



A proposal for

City of Lauderdale

Forensic Accounting Services

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Submitted by Forvis Mazars

ORIGINAL RLI 2025-044

**forvis
mazars**

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July 10, 2025

Kentrea Dykes
Purchasing and Contracts Manager
City of Lauderhill
5581 W. Oakland Park Blvd
Lauderhill, FL 33313

Dear Ms. Dykes:

We understand the City of Lauderhill (City) has a critical need for a qualified and experienced firm to conduct a detailed forensic audit, especially around U.S. Department of Health and Human Services (HHS) grants and Lauder Health and related to Prosperity Partnership (LHPP). We recognize the importance of this project in maintaining compliance with the requirements of the grants, policies and the Code of Ordinances of the City of Lauderhill, and the use of funds by subrecipients.

Navigating this environment can be difficult without a professional services firm with extensive public sector experience to provide helpful guidance and tools you require. Forvis Mazars is here to help.

Our firm has extensive experience in both conducting forensic projects of various types and conducting grant management policy and procedure assessments. Our firm has provided similar services to state and local governmental entities, not for profits, for profits, public school systems, and higher education public and private institutions. Our team of qualified professionals brings a wealth of knowledge and experience, having worked on complex cases that require a deep understanding of both financial systems and regulatory requirements. We pride ourselves on our ability to deliver detailed and precise forensic projects that meet the unique challenges faced by public sector entities, providing compliance support and fostering trust among stakeholders.

Forvis Mazars can provide the City with the forensic accounting services and the specific insight and knowledge you deserve. While forensic accounting services may look alike on paper, the quality of the service process, timing, and resulting ideas that can help manage risk and improve operational efficiency can vary among providers.

We believe our proposal will help you select our firm for efficient and objective services delivered by experienced professionals. You may reach us by phone or email as provided below.

Respectfully Presented,

A handwritten signature in black ink that reads "Julie Murdock".

Julie Murdock, CPA, CGMS, CTP
Managing Director / National Grants
Management Services Leader
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A handwritten signature in blue ink that reads "Wm. Blend".

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A handwritten signature in black ink that reads "Kim Swain".

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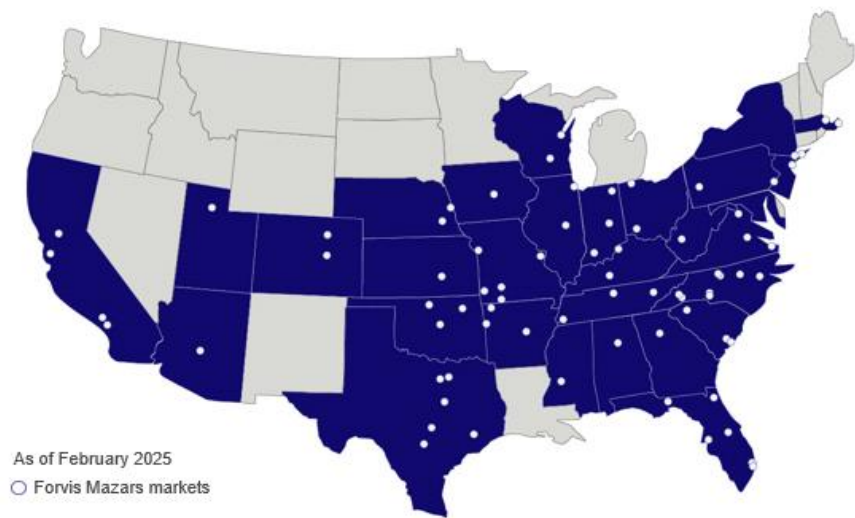
Our acceptance of this engagement is subject to completion of our normal client acceptance procedures. Upon acceptance, the actual terms of our engagement will be documented in a separate letter to be signed by you and us. The information provided in this proposal is intended for informational purposes only and may not be copied, used, or modified, in whole or in part, without Forvis Mazars prior written approval. Most statistical information in this proposal is as of May 31, 2024, unless otherwise noted.

Qualifications and Experience

Firm Overview

Forvis Mazars, LLP (Forvis Mazars) is a Delaware limited liability partnership and an independent member of Forvis Mazars Global Limited, a leading global professional services network. Forvis Mazars was formed in 2022 through the combination of two nearly 100-year-old firms, both committed to providing **Unmatched Client Experience®** (UCX) —BKD, established in Kansas City and Joplin, Missouri, in 1923, and Dixon Hughes Goodman LLP (DHG), established in Norfolk, Virginia, in 1932. The current name, Forvis Mazars, LLP, was created in 2024 when FORVIS and Mazars created a two-firm network.

Ranked among the largest public accounting firms in the United States, the firm’s 7,000 dedicated team members provide an UCX through the delivery of assurance, tax, and consulting services for clients in all 50 states and internationally through the global network.



Our professionals combine the insight and ideas of multiple disciplines to serve numerous industries, including:

- | | | |
|------------------------------|---------------|-------------------------|
| • Public Sector | • Nonprofit | • Education |
| • Financial Services | • Healthcare | • Private Client |
| • Commercial Products | • Insurance | • Private Equity |
| • Construction & Real Estate | • Dealerships | • Technology & Services |

Commitment to the State of Florida

Forvis Mazars serves over 800 public sector clients and is the largest provider of single audits nationally. Our firm has successfully expanded into strategic markets including Tampa, Boca Raton, and Fort Lauderdale to serve current and future clients. Forvis Mazars now has over 300 team members in the state of Florida and seven offices.

Our Florida Presence



Florida Office Locations

- Boca Raton
- Fort Lauderdale
- Jacksonville
- Miami
- Orlando
- Tallahassee
- Tampa Bay

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Public Sector Industry Insight

The Public Sector Practice at Forvis Mazars is driven by our commitment to forward vision. As a public entity, you face many challenges including new funding, new compliance regulations, and continued pressure to provide improved services with fewer resources. Forvis Mazars brings together experience and insight to help you achieve your specific financial, operational, and risk management objectives. Our professionals are armed with relevant public sector experience, top-tier data analytics tools, and process knowledge to help you address the risks and challenges of trying to do more with less. Our services are tailored to each client and can help you improve service delivery outcome; comply with policy requirements; reduce costs; and address fraud, waste, and abuse.

To reinforce our commitment to the public sector, our advisors routinely attend conferences focused on industry issues and trends. They also receive continuing professional education (CPE) to stay informed of industry regulatory updates and other general accounting issues, averaging approximately 60 hours of formal training annually.

This dedication also extends to involvement on national industry committees, such as GASB and American Institute of CPAs (AICPA).

Shauna Woody-Coussens, managing director and leader of our Public Sector Advisory Services practice, is a member of the AGA and regional AGA chapters, the Government Finance Officers Association (GFOA) and state GFOA organizations, and the Association of Certified Fraud Examiners (ACFE) and regional ACFE organizations. Shauna is a sought-after speaker on fraud in the public sector and recently spoke at the AICPA's 2024 Governmental & Not-for-Profit Training Conference.

Karen Kurtin, the practice leader of our Government Outsourced Accounting Services team has more than a decade of experience. She is a Certified Fraud Examiner and former municipal finance director. As well as a member of the American Institute of CPAs, Texas Society of CPAs, GFOA, GFOA Texas, Association of Certified Fraud Examiners.

Partner Lindsey Oakley, who currently serves in Forvis Mazars' professional standards group, is the chair of the Executive Committee of the AICPA Governmental Audit Quality Center. She also serves on the Comptroller General's Advisory Council on *Government Auditing Standards*.

Chris Telli, a partner in our Colorado Springs office, is a member of the GFOA GAAFR Technical Advisory Board. This board reviews content and provides advice and technical suggestions on supplements to Governmental Accounting, Auditing, and Financial Reporting (the "Blue Book"). He is also a member of the AICPA State and Local Government Expert Panel, a panel of individuals knowledgeable of the state and local government industry that deliberates and forms consensus on key industry matters.

Amy Shreck, a partner in our Omaha office, is a former GASB practice fellow and currently is a member of the GFOA Accounting, Auditing, and Financial Reporting Committee. This committee assists finance officers applying auditing and accounting standards to create transparency in financial reports and works closely with the GASB, AICPA and other organizations to recommend best practices in government finance operations.

Bill Blend, a managing director based in the Orlando office, is a member of the Governmental Accounting Standards Advisory Council (GASAC). The primary function of the GASAC is to advise the GASB on issues related to projects on the Board's agenda, possible new agenda items, project priorities, procedural matters that may require the attention of the GASB, and other matters as requested by the chair of the GASB. GASAC meetings provide the Board with an opportunity to obtain and discuss the views of a very diverse group of individuals from varied professional and occupational backgrounds.

Becca Kiser, a senior manager in our Little Rock office, recently completed a term as a practice fellow at GASB's headquarters, where she is helped to formulate standards and assisted with technical inquiries. Becca re-joined Forvis Mazars in late 2024 and is now able use her firsthand experience at GASB to help clients better understand GASB standards and the thought process behind those standards.

Forvis Mazars advisors also actively serve as participants, exhibitors, speakers, and sponsors in regional and national associations for governmental organizations.

Public Sector Experience

Being a public servant isn't for the faint of heart. Aging infrastructure, limited revenue sources, regulatory changes, and ever-present budgetary constraints are only a few of the many challenges you face as you strive to meet the needs of your residents, customers, and communities. Our advisors have the knowledge and experience to provide the support the City needs to help you move forward with confidence.

Public Sector Services & Support

The Reporting Solution

TRS is a web-based platform that helps clients dynamically build financial reports in real-time, streamlining and simplifying the annual reporting process.

Financial Management Consulting

Our suite of financial management consulting services can help clients gain insight to efficiently spend public funds and drive improvement.

Grants Management Services

We can help clients create, broaden, or improve process efficiency at every stage of the grant life cycle.

Operations Management Consulting

We can help clients develop practical management tools to provide insight into the City's performance.

Risk Management Consulting

We can help build a risk management program, set strategies, and provide tools to apply across your organization.

Representative Client Listing

- City of Lincoln, Nebraska
- Omaha Public Power District
- City of Frisco
- City of San Antonio, Texas
- MS Office of State Auditor
- Indianapolis Airport Authority
- Indiana Chamber of Commerce
- Platte River Power Authority
- Village of New Lenox
- Bloomington & Normal Water Reclamation District
- City of Phoenix
- City of Indianapolis
- City of Arlington
- Sedgwick County
- Jackson County
- Douglas County
- City of Colorado Springs
- City of Aurora
- City of Onslow

"Forvis Mazars advisors are willing to answer our questions, not only in the audit period, but throughout the year. Our advisors are available, professional, and responsive. Their expertise in government accounting is greatly appreciated, and they continue to be a huge resource for our team."

Melinda Jones

City of Lincoln, Nebraska

Forensic Audit Services

800+

Public Sector Clients Served

#1

Provider of Single Audits

Per Federal Audit Clearinghouse data for 2024 Year-Ends

Thought Leadership

Forvis Mazars is pleased to host annual Public Sector Seminars! These live, interactive CPE-eligible events cover hot topics in the industry and current challenges. In addition, we leverage insight and innovation to develop FORsights, our series of alerts, articles, and webinars tailored to the public sector industry to help you stay informed and prepared for what's next.

Clients Served

- State & Local Governments
- Airports
- Transportation Authorities
- Public Power & Utility Providers
- Tribal Governments
- Public Colleges & Universities



Understanding of the Services Being Requested

Forensic Audit Experience

Forvis Mazars formalized the delivery of forensic accounting and litigation support services under our Forensics & Valuation Services (FVS) practice on January 1, 2006. With our cutting-edge support services, our forensic services can be a valuable resource for you. Forvis Mazars has more than 80 professionals nationally with varying skillsets to assist with each unique investigative matter. Our forensics professionals concentrate their careers in helping resolve disputes through fraud investigations, litigation support services, data analytics, and digital forensics. Team members have achieved master's degrees and hold multiple certifications including Certified Public Accountant (CPA), Certified in Financial Forensics (CFF), Certified Fraud Examiner (CFE), Cyber-Threat Forensic Investigator (CTFI), and EnCase® Certified Examiner (EnCE®). Our professionals' diverse backgrounds provide the City with resources should an unanticipated question or issue arise.

Additionally, our forensic professionals are familiar with courtroom testimony, complying with and following the rules of evidence in state and federal jurisdictions, and working with attorneys in understanding their forensic needs. These include industry and service professionals, consulting attorneys, CPAs, forensic accountants, Certified Forensic Examiners, and digital forensics personnel.

Forensic accounting issues and investigations often require the combined effort of individuals with different skillsets. Our forensic professionals have the experience to help clients from the beginning to the end of an investigation and across many different types of issues. Our FVS professionals will work closely, as needed, with our Data Analytics and Digital Forensics professionals to provide clients with a cohesive team to address the many facets of complex forensic audits and investigations including managing large structured and unstructured data sets, complex digital forensic issues, and advanced forensic data mining.

Grant Management Experience

Our Grants Management Services practice assists clients daily with compliance, technical assistance, and assessments. Our forward vision on evolving Uniform Guidance and federal and state regulations helps keep our clients moving with momentum. We help organizations across the country successfully manage grant funds while continuing to serve their communities and fulfill their day-to-day responsibilities. We want to put our experience to work for you by providing services for each stage of the grant life cycle. Our approach integrates project management principles into each component to help you benefit from our commitment to helping you accomplish your mission with transparency and accountability.

Together We Can:

With dedicated forensics and grants management practices, we are perfectly situated to provide the City a tailored approach. Together, with the City, we can:

1 Conduct a Forensic Audit of Grant Funds

Conduct a forensic audit of grant funds awarded to the City of Lauderhill by the U.S. Department of Health and Human Services and each grant awarded to the City that are related to the Lauderhill Health and Prosperity Partnership (LHPP).

2 Investigate Compliance

Investigate compliance of referenced grants with the requirements of the grant, policies, and Code of Ordinance of the City of Lauderhill.

3 Survey the Use of Grant Funds

Survey the use of grant funds by grant subrecipients to see if they are in compliance with the requirements of the grants, policies, and the Code of Ordinance of the City of Lauderhill.

4 Prepare a Calendar

Prepare a calendar to include each element outlined in the Commission Resolution 25R-6178.

5 Assess the Schedule of Expenditures

Assess the schedule of expenditures of Federal and State awards in accordance with the Federal and Florida Single Audit Act, respectively.

6 Issue a Summary Report

Issue a report summarizing the engagement including the observations and findings resulting from the audit performed; evidence gathered; and the extent, if any, of city losses and potential steps to be taken to avoid losses in future.

7 Present Findings

Present findings to the full Commission at a meeting or workshop.

8 Retain Working Papers

Retain working papers and reports for a minimum of three (3) years, and make them available, upon request.

Sample Client Sectors	Sample Funding Sources
<ul style="list-style-type: none">• Municipal Governments• County Governments• State Governments• State Agencies• Tribal Governments• Economic Development Authorities• Healthcare Systems• Nonprofit Entities• For-Profit Entities• Departments of Education	<ul style="list-style-type: none">• Health and Human Services (HHS)• Federal agencies grant programs• State-funded grant programs• Federal Emergency Management Agency (FEMA)• Small Business Administration (SBA)• The Coronavirus Aid, Relief, and Economic Security (CARES) Act• American Rescue Plan Act (ARPA)• Infrastructure Investment & Jobs Act (IIJA)• Inflation Reduction Act (IRA)• Housing and Urban Development (HUD)• United States Department of Agriculture (USDA)

Technical Approach

Forvis Mazars generally takes a risk-based approach to your audit. The forensic audit will focus on compliance reviews and may include, but may not be limited to, the following areas:

1 Regulatory Compliance Assessment

- Inspect policies and procedures related to financial management, grant administration, and reporting.
- Study compliance with the applicable grant guidance, Uniform Guidance (2 CFR Part 200), and other applicable federal and state regulations identified by the City of Lauderhill.
- Assess for adherence to local ordinances identified by the City and applicable grant guidance.

2 Grant Management and Oversight

- Survey grant applications, award letters, budgets, and expenditure reports.
- Inspect internal controls over grant funding allocations, drawdowns, and reporting.
- Study a sample of grant-funded transactions for allowability, eligibility, and documentation.
- Inspect compliance with grant-specific terms and conditions, including matching requirements and performance reporting.

3 Use of Public Funds

- Study expenditures for compliance with approved budgets and funding restrictions.
- Appraise procurement and contracting practices for compliance with competitive bidding and conflict-of-interest policies.
- Identify potential unallowable, unsupported, or questionable costs.

4 Financial Transparency and Reporting

- Study the timeliness, accuracy, and completeness of financial reports submitted to oversight agencies and the public.
- Assess for compliance with public disclosure requirements, including City and FOIA obligations.
- Inspect the accessibility and clarity of financial information provided to stakeholders.

5 Corrective Action Monitoring

- Study prior compliance audits or monitoring reports and access the subrecipient's response to findings.
- Consider the implementation and effectiveness of corrective action plans.
- Identify recurring issues or systematic weaknesses in compliance oversight.

Methodology: Our methodology will include:

- Studying internal policies and procedures alongside applicable local, state, and federal regulations to create compliance benchmarks.
- Selecting and testing a sample of expenditures and grant-funded activities for compliance with funding restrictions, documentation standards, and allowability.
- Inspecting grant management practices, including funding allocation, reporting, and adherence to grantor requirements.
- Considering the accuracy, timeliness, and accessibility of financial reports and public disclosures.
- Investigating prior audit findings and assessing the City's implementation and monitoring of corrective actions.

Access: To perform this scope of work, we may need access to the following information and data, if applicable:

- Internal financial policies and procedures
- Grant management manuals or guidance
- Procurement and contracting policies
- Policies related to financial oversight

- Applicable federal, state, and local regulations
- Grant applications, award letters and agreements
- Grant budgets and amendments
- Drawdown requests and reimbursement documentation
- Grant expenditure reports and supporting invoices
- Performance and compliance reports submitted to grantors
- General ledger and transaction-level data for the Scope Period exported to Excel
- Budget-to-actual reports for funds, including grants
- Documentation for the sampled expenditures (e.g., POs, invoices, approvals)
- Payroll records for grant-funded positions
- Capital project funding and expenditure records
- Vendor master list
- Procurement records, including bids, quotes, and contracts
- Conflict of interest disclosures
- Sole-source justifications
- Annual financial reports
- Reports submitted to federal agencies
- FOIA request logs and responses related to financial matters
- Prior internal and external audit reports
- Monitoring reports from grantors or oversight agencies
- Corrective action plans and implementation status updates
- Correspondence related to audit findings or compliance issues
- Interviews/walkthroughs with:
 - Finance staff
 - Grants staff
 - Compliance staff

Standard Audit Plans: Based upon our experience, we have created standard audit plans which will be executed as follows:

- We will meet with those charged with governance to discuss the intended audit plans and provide opportunity for the City to give input into the process; this initial meeting will assist in establishing clear communication lines.
- We will then form an understanding of the internal control structure and internal reporting and will create the final audit plans as well as final fieldwork test programs.
- We will be performing interim testing, other initial planning, and discussion to give preliminary feedback, as deemed necessary.
- Once fieldwork is complete, the partner will complete his/her review and submit the work to the concurring review partner.
- When reviews have been completed and the work is substantially complete, we will meet with those charged with governance and management to provide the required communication and discuss any remaining issues.

Specific Deliverables

Forvis Mazars understands the importance of regular updates and communication surrounding the status of any project and the findings to date on these projects. We are prepared to complete a written progress report every four weeks in order to share the status, progress, and direction of our work. We will also include any preliminary findings, conclusions, and recommendations as we progress on the forensic audit which will aid in allowing the City to begin implementing any corrective actions immediately. We understand that any timeline submitted will need to be approved by your designated forensic audit leadership and will modify and/or update initial submissions if requested. We have provided a sample timeline below. The timeline is intended to be a representative sample and will be modified based on our final scoping and planning.

We will work with the City administration on a communication plan and deliverable schedule that meets your needs. We will provide the following deliverables to enable transparency, accountability, and actionable outcomes for the City.

Draft Forensic Report

Three weeks prior to the due date of the final forensic audit report, we will provide a written draft of the report which will detail our findings and recommendations. This will allow your designated leadership team for the forensic audit to review and respond to preliminary conclusions, encourages factual accuracy, and allows for clarification or submission of additional documentation for consideration. The City administration may also provide written responses to the findings to be included in the final forensic audit report, if so desired.

Final Forensic Report

The final forensic audit report will be a detailed written report including:
Forensic Audit Services

- Executive summary of findings
- Scope of services performed
- Detailed analysis of each forensic audit area
- Supporting documentation exhibits
- Identification of control weaknesses, noncompliance, and potential fraud, waste, abuse, or mismanagement
- Recommendations for:
 - Strengthening internal controls
 - Enhancing regulatory compliance
 - Improving financial transparency and governance

If the City administration provides written responses to the draft forensic audit report, the final report can also include a corrective action plan matrix with suggested timelines and responsible parties.

Presentation to Full Commission

As requested, Forvis Mazars can present findings to the full Commission at a meeting or workshop.

Assigned Staff

Overview of Assigned Staff

Key Personnel



Julie Murdock
Client Relationship Executive /
Grants Management Services



Kim Swain
Engagement Executive – Grants
Management Services



Darshana Shyamsunder
Project Manager



Cecilia Farris
Project Staff

Additional Resources



Robert Sprague
Subject Matter Advisor – Forensic
Services



Karen Kurtin
Subject Matter Advisor – GASB &
GAAP

Credentials Licenses of Assigned Staff

Staff Member	Project Role	Licenses, Certifications, and Memberships
Julie Murdock	Client Relationship Executive – Grants Management Services	Certified Public Accountant (CPA), Certified Grants Management Specialist (CGMS), Certified Treasury Professional (CTP®), TXCPA, Association for Financial Professionals
Kim Swain	Engagement Executive – Grants Management Services	Certified Grants Management Specialist (CGMS), Grant Professionals Credentialed (GPC), Project Management Professional (PMP)
Robert Sprague	Subject Matter Advisor – Forensic Services	Certified Public Accountant (CPA), Certified Fraud Examiner (CFE)
Karen Kurtin	Subject Matter Advisor – GASB and GAAP	Certified Public Accountant (CPA), CFE (Certified Fraud Examiner), Certified Government Finance Office (CGFO), American Institute of CPAs, TXCPA, Association of Certified Fraud Examiners (ACFE), Dallas ACFE Government Finance Officers Association of the United States and Canada (GFOA), GFOAT, GFOA's Special Review Committee
Darshana Shyamsunder	Project Manager	Certified Grants Management Specialist (CGMS)
Cecilia Farris	Project Staff	National Grants Management Association member

Resumes of Assigned Staff

We take team selection seriously and have a highly qualified team of advisors to meet your needs. Previous experience is a primary determinant for assigning professionals to your engagement, and we have assigned individuals who are experienced in working within the public sector industry to your engagement.



Julie Murdock, CPA, CGMS, CTP

Managing Director / Client Relationship Manager

972.361.3765

julie.murdock@us.forvismazars.com

As practice leader of the Grants Management Services line, Julie has more than 25 years of financial and grants management experience in the public sector, nonprofit, and commercial industries. Her knowledge includes, grants management and compliance, and audit preparation, including Single Audits, grant writing, coordination of grant applications and RFPs, financial reporting, and board governance.

In addition to meeting the accounting and advisory needs of her clients, she is a trusted professional offering strategic planning, cash forecasting, and financial operational assessments. She has additional experience leading forensic engagements capital campaigns and construction services as well as system implementations.

Julie serves as subject matter advisor and engagement executive involving many funding sources, including the Infrastructure Investment and Jobs Act, American Rescue Plan, CARES Act, and the Department of Education (ESSER I, II, and III; and EANS). She also has experience managing multiple other federal and state grants through the U.S. Department of Energy, U.S. Department of Health and Human Services, U.S. Department of Housing and Urban Development, U.S. Department of Justice, and U.S. Department of Labor.

She actively interacts with boards, commissioners, and councils, including preparing clear, concise, and timely reports and presentations. She has extensive experience applying her analytical skills to Uniform Guidance, contract compliance, and aligning financial resources and program compliance requirements.

In her prior experience as a chief financial officer, Julie was a member of the senior leadership team in a high-growth environment with oversight for finance, grants administration, treasury, risk management, contract administration, human resources, technology, facilities, and retail operations. She actively participated in board and executive committee meetings and served as staff liaison with audit and finance committees, including multiple investment committees.

She is a member of TXCPA and Association for Financial Professionals and is a Certified Treasury Professional (CTP).

Julie is a graduate of Texas A&M University, College Station, with a B.S. degree in economics, and a graduate of University of Dallas, Irving, Texas, with an M.B.A. degree.



Kim Swain, CGMS, GPC, PMP

Director / Engagement Executive

417.520.5394

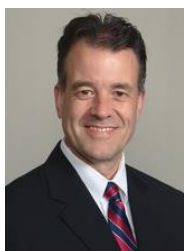
kim.swain@us.forvismazars.com

Kim is a grants management director with Forvis Mazars. She has nearly 20 years of grant writing and management experience, including 10 years as a grants director for a sovereign nation. Kim has been

awarded more than 150 competitive grants totaling \$40 million. She also has provided grant writing, research, and grant compliance services that have repeatedly resulted in innovative revenue growth and increased margins. Her consulting and advisory services include strategy development, relationship management, concept implementation, project and program development, budget preparation, grant writing, grant management, and grant compliance.

Before joining Forvis Mazars, her grants experience included directing, developing, and managing the grant process from pre- to post-award for 30+ grants annually (from more than 15 federal agencies) including planning, budgeting, strategy, program/project development, and project management. In addition, she oversaw financial management and procurement for compliance, establishing procedures for internal controls to monitor compliance with federal grants rules and regulations, specifically 2 CFR Part 200. Kim also confirmed satisfactory documentation of files for each grant-funded project for tracking and reporting purposes.

Kim is a graduate of John Brown University, Siloam Springs, Arkansas, with a B.S. degree in organizational management.



Bob Sprague, CPA, CFE

Managing Director / Subject Matter Advisor – Forensic Services
312.776.2768
bob.sprague@us.forvismazars.com

Bob is a member of the Forensics & Valuation practice unit. He focuses on providing fraud investigation, forensic accounting, and litigation consulting services. His experience encompasses a wide spectrum of financial consulting matters spanning multiple industries and client types. Bob works closely with corporate stakeholders, in-house and outside counsel, auditors, and special committees on forensic and fraud investigations with an emphasis on SEC enforcement matters and fraudulent financial reporting.

His experience also includes investigations related to the Foreign Corrupt Practices Act, commercial litigation involving technical accounting issues, assisting clients with post-acquisition accounting disputes, and conducting proactive compliance-related work, such as anti-corruption assessments and broader compliance program related assessments, on behalf of public and private companies.

Prior to joining the Forensics & Valuation practice unit, Bob spent more than 22 years working for two global professional service firms. He also worked as an enforcement accountant in the enforcement division of the SEC, where he investigated potential securities laws violations. Bob's prior experience also included conducting financial statement audits on behalf of multinational public and private companies.

He participates in more than 50 hours of continuing education each year, including delivering courses related to fraud investigation and forensic accounting at industry conferences, to audit practitioners, to clients, and to law firms. He spent more than 10 years as an adjunct professor teaching a series of forensic accounting courses in a graduate certificate program in forensic accounting at Northeastern University.

Bob is a graduate of Bates College, Lewiston, Maine, with a B.S. degree in economics, and a graduate of Northeastern University, Boston, Massachusetts, with an M.B.A. degree and an M.S.A. degree.

**Darshana Shyamsunder, CGMS**

Manager / Project Manager

629.900.2186

darshana.shyamsunder@us.forvismazars.com

A member of the Grants Management Services line, Darshana has more than 13 years of grant administration and project management experience. Her key experience includes grant writing, grants management, strategic planning, and program operations. Her grants management experience includes working on projects involving IRS, CARES Act, and ARPA funding.

Prior to joining FORVIS, she worked in both nonprofit and for-profit industries in India and the U.S., serving in a variety of roles related to the operational and financial growth of organizations. She actively participated in board and executive committee meetings and served as staff liaison for strategic planning of social impact solutions.

Darshana is a member of the National Grants Management Association.

She is a graduate of Villanova University, Pennsylvania, with an M.P.A. degree, specializing in nonprofit leadership, and a graduate of Nirmala Niketan, Mumbai, India, with a B.Sc. degree in human development.

**Cecilia Farris**

Senior Consultant / Project Staff

281.501.4932

cecilia.farris@us.forvismazars.com

A member of the Grants Management Services line, Cecilia is an experienced project manager who provides grants management assistance to clients from various public sector entities. Cecilia has extensive experience managing and monitoring funds from the following federal sources: American Rescue Plan Act (ARPA), Coronavirus State and Local Fiscal Recovery Funds (SLFRF), U.S. Department of Justice (DOJ), Elementary and Secondary School Emergency Relief (ESSER), U.S. Department of Housing and Urban Development (HUD), and Texas Community Development Block Grant Disaster Recovery (CDBG-DR) funds.

Prior to joining Forvis Mazars, she also worked in the grants management industry where she gained experience in every stage of the grants management life cycle. She has managed programs funded by HUD and CDBG-DR funds. Her responsibilities as a project manager included writing policies and procedures; planning; and people, resource, and program management.

Cecilia is a 2018 graduate of Texas A&M University, Corpus Christi, with a B.B.A. degree in economics.



Karen Kurtin, CPA, CFE, CGFO

Director / Subject Matter Advisor – GASB & GAAP

469.218.91173

karen.kurtin@us.forvismazars.com

The practice leader of the Government Outsourced Accounting Services team, Karen has more than 17 years of public sector experience; this includes 11 years providing audit services to government entities and six years managing finance for a Texas municipality. She also has experience with annual report writing, year-end accruals, audit interface, Popular Annual Financial Report creation, and a myriad of other outsourced accounting and finance needs for the public sector. As a member of the firm's Public Sector Advisory practice unit, Karen serves governmental entities across the country.

In her prior role as the finance director of a Texas municipality, she performed a variety of supervisory, professional, administrative, and technical accounting and finance functions. Her duties involved regular presentations to the town council, budget preparation, monthly journal entry approval, monthly financial and investment report preparation, and year-end pension, post-employment benefit, lease, and capital asset entries, as well as interfacing with independent auditors. Karen also served as investment officer and maintained the town's cash and investment portfolio and supervised utility billing customer service and municipal court.

Karen's career as senior manager at a predecessor firm to Forvis Mazars included supervising the audit team, communicating audit results to city council and management, and authorizing the signing and release of audit reports.

She is a Certified Fraud Examiner (CFE) and Certified Government Finance Officer (CGFO). She is a member of the American Institute of CPAs, TXCPA, Government Finance Officers Association of the United States and Canada (GFOA), GFOAT, Association of Certified Fraud Examiners, and Dallas ACFE. In addition, she serves on the GFOA's Special Review Committee.

Karen is a graduate of Texas A&M University, College Station, with a B.S. degree in mathematics, and a graduate of The University of Texas at Dallas, with an M.S. degree in accounting and information management.

Price proposal

Our goal is to be candid, punctual, answer your questions about fees upfront, and avoid fee surprises. We set our fees by evaluating a number of variables: the complexity of the work, the project's scope, the time we will spend, and the level of professional staff needed. Our fee is estimated to be \$74,000. We will not exceed this amount without your prior written consent. The blended hour rate is expected to be \$285, which represents a discount of over 35% of our market rates. In addition to our quoted fee, you will be billed travel costs and an administrative fee of 5%. This fee covers items such as copies, postage and other delivery charges, supplies, technology-related costs, such as computer processing, software licensing, research and library databases, and similar expense items.

Our fees may increase if our duties or responsibilities change because of new rules, regulations, accounting or auditing standards. We will consult with you should this happen.

Hourly Rates

Any work outside the proposed scope will be billed according to our hourly rates.

Staff Level	Hourly Rates
Partner / Principal / Managing Director	\$340
Director / Senior Manager	\$315
Manager	\$300
Senior Associate / Senior Consultant	\$235
Associate / Consultant	\$215

Our professional hourly rates may increase during a calendar year. We reserve the right to submit to the City an hourly rate adjustment request thirty (30) days prior to the effective date of the increase.

Appendix

Exceptions to Terms and Conditions

Upon being selected as the successful bidder, Forvis Mazars may require modification to the terms and conditions, as referenced in the Request for Letters of Intent, to comply with professional standards and/or firm policies. As Forvis Mazars has successfully resolved similar terms and conditions with other municipalities, we are confident the parties can successfully negotiate a mutually acceptable agreement. Forvis Mazars sincerely appreciates the City's understanding and consideration. We look forward to working with the City on this engagement.

Helping You Unlock Additional Value

We would strive to create a rapport with the City that enables you to discuss new accounting issues or unusual transactions with us throughout the year. We would value these interactions with you and consider many of these included in the scope of our fees. If these discussions evolve into a broader project requiring additional research, procedures, or analysis, we will proactively discuss any added scope and fees with you. In addition, we have identified the following potential services that we believe could benefit you.



Public Sector Advisory Services

Our Public Sector practice has the experience to help you improve your operations and management across a wide range of local government functions. We can help you drive improvement by employing competitive tools. In addition, using performance measurement and data analytics techniques to identify service cost and quality issues, Forvis Mazars can help you find ways to more efficiently and effectively spend public funds.



Grants Management Services

We have helped government entities across the country successfully manage grant funds while continuing to serve their communities. We can support you at any point within the three phases of the grant life cycle: pre-award, award, and post-award. Our approach integrates project management principles into each component to help you benefit from a well-established method for accomplishing your mission with transparency and accountability.



Grants Management Services – BRIC Program

We bring a dedicated grants management team with extensive grant writing, application management, compliance, administration, and monitoring experience. We have helped entities in various industries across the country successfully manage grant funds so they can continue to serve their communities and fulfill their day-to-day responsibilities. We can support you at any point within the three phases of the grant life cycle: pre-award, award, and post-award.

U.S. Presence

Leading U.S. Firm

\$2.2bn

Revenue (FY2024)*

75

Markets

30

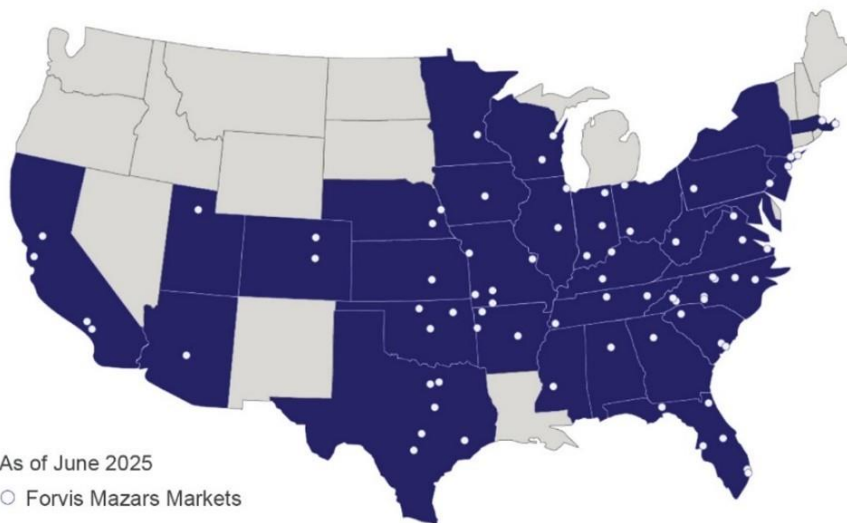
States

600+

Partners & Principals

7,000+

Employees



As of June 2025

○ Forvis Mazars Markets

Alabama

Birmingham

Arizona

Phoenix

Arkansas

Fort Smith
Little Rock
Rogers

California

Irvine
Los Angeles
Sacramento
San Jose

Colorado

Colorado Springs
Denver

Florida

Boca Raton
Fort Lauderdale
Jacksonville
Orlando
Tallahassee
Tampa Bay

Georgia

Atlanta

Illinois

Chicago
Decatur

Indiana

Evansville
Fort Wayne
Indianapolis

Iowa

Des Moines

Kansas

Wichita

Kentucky

Bowling Green
Louisville

Massachusetts

Boston Brewster
Boston-Chestnut Hill

Minnesota

Minneapolis

Mississippi

Jackson

Missouri

Branson
Joplin
Kansas City
Springfield
St. Louis

Nebraska

Lincoln
Omaha

New Jersey

Iselin

New York

Long Island
New York City

North Carolina

Asheville
Charlotte SouthPark
Charlotte Uptown
Greensboro
Greenville
Hendersonville
Raleigh
Winston-Salem

Ohio

Cincinnati
Toledo

Oklahoma

Enid
Oklahoma City
Tulsa

Pennsylvania

Fort Washington
Pittsburgh

South Carolina

Charleston
Greenville
Summerville

Tennessee

Knoxville
Memphis
Nashville

Texas

Austin
Dallas
Fort Worth
Houston
San Antonio
Waco

Utah

Salt Lake City

Virginia

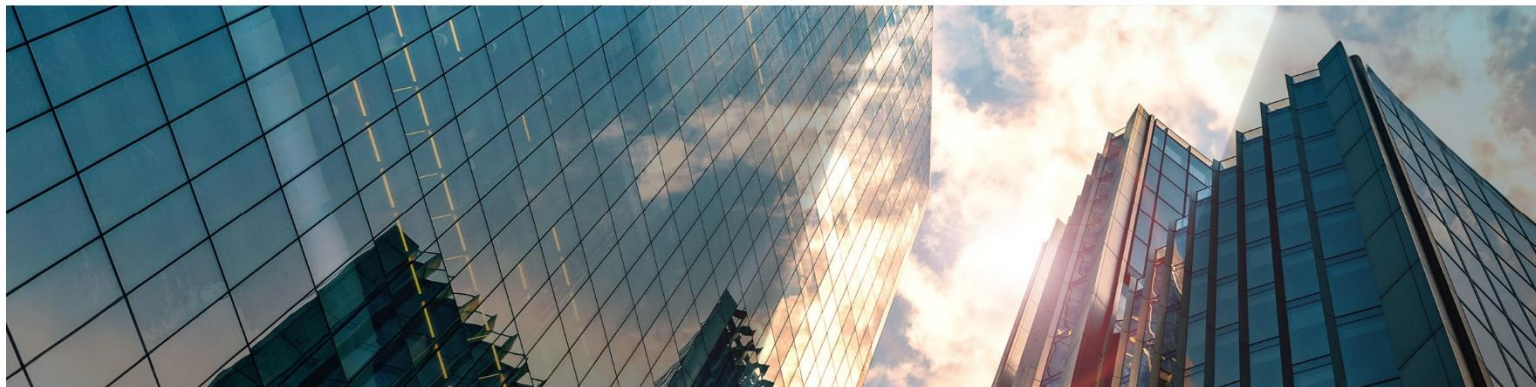
Norfolk
Richmond
Tysons

West Virginia

Charleston

Wisconsin

Appleton
Madison



Forvis Mazars

Overview

With a legacy spanning more than 100 years, Forvis Mazars is committed to providing a different perspective and an unmatched client experience that feels right, personal and natural. We respect and reflect the range of perspectives, knowledge and local understanding of our people and clients. We take the time to listen to deliver consistent audit and assurance, tax, advisory and consulting services worldwide.

We nurture a deep understanding of our clients' industries, delivering greater insight, deeper specialization and tailored solutions through people who listen to understand, are responsive and consult with purpose to deliver value.

Deep industry understanding

Forvis Mazars' deep understanding of industry-specific environments, issues and trends helps us anticipate and address evolving needs to prepare you for strategic opportunities ahead.

Every industry is different, and we put a strong focus on specific industry experience and knowledge of your complex and evolving environment. We provide a range of audit and assurance, tax, advisory and consulting services to help your business by bringing together experienced professionals from all over the globe who understand local contexts and cultures.

We serve global industries including:

- Financial Services
- Manufacturing & Distribution
- Technology, Media & Telecommunications
- Life Sciences
- Private Equity

\$5B

combined revenue
(2023)

100+

combined countries,
territories & markets

400+

combined offices
& locations

1,800+

combined partners

40,000+

combined team members

forvismazars.com/global

Forvis Mazars is the brand name for the Forvis Mazars Global network (Forvis Mazars Global Limited) and its two independent members: Forvis Mazars, LLP in the United States and Forvis Mazars Group SC, an internationally integrated partnership operating in over 100 countries and territories. Forvis Mazars Global Limited is a UK private company limited by guarantee and does not provide any services to clients. Visit forvismazars.com/global to learn more about the global network.

**forvis
mazars**

Contacts

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