

Agreement For Professional Services

This Agreement is dated and effective as of **February 13, 2025**, between the **Town of Munster, Indiana** (the "Town" as the "Client") through the Office of the Clerk-Treasurer and **Development Economic Finance Consulting LLC** (d.b.a. def Consulting, as the "Consultant").

This Agreement authorizes and describes the scope, schedule, and payment conditions for Consultant's work to provide and assist with certain economic development - finance professional services (the "Basic Services") for the period from **February 1, 2025 through April 30, 2025** in connection with general consulting and statutory reporting requirements related to the Annual Financial Report ("AFR") ending December 31, 2024 for designated municipal economic revitalization areas ("ERA") in the Town, (the "Project").

Client's Authorized Representative: Wendy Mis, Clerk-treasurer – Town of Munster, Indiana

Address: 1005 Ridge Road
Munster, Indiana 46321

Telephone: (219) 836-6942 email: wmis@munster.org

Consultant: Daniel Botich, President + Sr. Development Economic Finance Professional

Address: 214 E. South Street
Crown Point, Indiana 46307

Telephone: 219.680.0825 email: DEF.dbotich@outlook.com

Scope: The Basic Services pursuant to the following Project tasks that may be authorized within the Project budget for this Agreement are detailed below.

1. Preparation of a listing (schedules and workpapers) of direct and indirect ERA assessed valuation deductions (Tax Abatements) impacting the Town as a taxing unit, pursuant to State Board of Accounts (SBOA) requirements for upload into Gateway as it relates to the Town's AFR for FY 2024 ending December 31, 2024.

"The Basic Services to be provided by the Consultant above are not intended or implied to be "municipal financial products," meaning municipal derivatives, guaranteed investment contracts, and investment strategies, as defined by the Section 975 of Title IX of the Dodd-Frank Wall Street Reform and Consumer Protection Act (2010) ("Dodd-Frank Act") amended Section 15B of the Securities Exchange Act of 1934 ("Exchange Act"), which must be provided to the Client by a qualified municipal advisor that: (i) is registered with the Securities and Exchange Commission (the "SEC") and (ii) complies with the regulations of the Municipal Securities Rulemaking Board (the "MSRB").

Furthermore, the Basic Services identified above do not include: (1) serving as a "municipal advisor" for purposes of the registration requirements of Section 975 of the Dodd-Frank Act or the municipal advisor registration rules issued by the Securities and Exchange Commission, or (2) advising the Client or staff regarding "municipal financial products" or the issuance of municipal securities, including advice with respect to the structure, timing, terms, or other similar matters concerning such products or issuances.

Other Available Services:

The following professional services will not be provided under this Agreement but are professional services identified as broader services that may be provided to the Client under a separate agreement to assist in the monitoring of approved ERA Assessed Valuation Deductions (Tax Abatements), including the following:

1. Economic Revitalization Area (ERA) Assessed Valuation Deduction (Tax Abatement) Monitoring Report.
 - ERA Monitoring. Data collection, review and preparation of a Monitoring Report for submission and presentation to the Town of active Tax Abatements (real property vacant building deductions, real property improvement deductions, and depreciable personal property deductions) approved by the Town's Common Council, pursuant to I.C. 6-1.1-12.1 titled Deduction for Rehabilitation or Redevelopment of Real Property in Economic Revitalization Areas, since January 1, 2015 (the prior 10 years) to determine annual tax levy impacts, tax revenue impacts and roll-off of assessed valuation deductions.
 - ERA Filing Packets. Preparation of filing packets to existing property owners approved for an assessed valuation deduction (Tax Abatement) and within a qualified abatement period including the January 1, 2025 assessment date specific to required filings on or prior to May 10, 2025 to the respective Offices of the Lake County Auditor, the Lake County Assessor, and the Town's' Common Council.
 - FORM CF-1 Review. Assistance to the Town's Common Council with the review of FORM CF-1 (Compliance Forms) filed in a timely manner, including the facilitation of the consideration and approval process prior to submission to the Lake County Auditor or other required entities for application of the January 1, 2025 assessment date ERA assessed valuation deductions (Tax Abatements).
 - Imposed Fees. Calculation of imposed fees to be applied to an assessed valuation deduction (Tax Abatement) pursuant to IC 6-1.1-12.1-14 as a condition of an approved FORM SB-1. Communications with the Office of the Lake County Auditor to apply (and manually bill) the imposed fee for collection and distribution to the economic development entity as director by the FORM SB-1 approving resolution.
2. Assistance to the Commission in the preparation for approval processes for a new or expansion of an ERA or an Economic Development Target Area (EDTA) as it applies to economic development actions of the Town's Common Council, including the documents, filings and analyses necessary for consideration and the approval process pursuant to the I.C. 6-1.1-12.1 titled Deduction for Rehabilitation or Redevelopment of Real Property in Economic Revitalization Areas.

Schedule:

Professional services to be provided from **February 1, 2025 through April 30, 2025** unless extended under mutual agreement of both parties in writing as a supplement to this Agreement, as required, as needed and as authorized by the Client pursuant to scope of services identified.

Payment:

The Consultant's professional fees to complete **the Basic Services under the Scope of this Agreement as authorized are a not-to-exceed ("NTE") amount of \$1,325.00** (One Thousand Three Hundred Twenty-five Dollars).

The Consultant anticipates **estimated expenses related to the Basic Services under the Scope of this Agreement to be \$0.00**; however, if expenses incurred exceeds the estimated amount, expenses shall be authorized by the Client in advance.

It is agreed that after 95% of the estimated compensation has been earned and if it appears that:

- (i) Completion of the authorized or requested services cannot be accomplished within the remaining 5% of the NTE amount, or
- (ii) The Client desires to continue said Agreement's professional services beyond the NTE amount,

the Consultant and the Client will confer to determine the basis for completing said Basic Services under the Scope and/or continuation of professional services, including a potential amendment to this Agreement to adjust the not-to-exceed amount accordingly.

The Client and Consultant select the hourly basis for payment of professional services provided by the Consultant. Consultant shall be compensated monthly. Monthly charges for services shall be based on Consultant's current billing rates for applicable employees plus charges for expenses.

Below is a list of current Consultant staff identified to provide professional services to the Client under this Agreement. Should employment or staffing assigned change, the Consultant will notify the Client of said staffing change(s) and assignment(s) by name and billing title such that hourly rates will remain consistent with billing titles identified herein as effective through December 31, 2025.

Staff Assignment	Hourly Rate
Administration	\$ 60.00
ED-Finance Professional / Research Analyst	\$ 115.00
Daniel Botich: Sr. ED-Finance Professional	\$ 230.00

Other Terms and Conditions:

This Agreement supersedes all prior contemporaneous oral or written agreements and represents the entire understanding between Client and Consultant with respect to the professional services to be provided by the Consultant hereunder.

This Agreement may not be amended except by written agreement signed by the authorized representatives of each party.

Agreement Signature and Execution:

By signing this Agreement below, both parties agree to the contents and conditions of this Agreement. Upon signature and date, this Agreement is deemed to be executed for purposes of providing professional services upon receipt.

[See Signature Page]

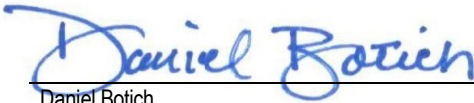
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SIGNATURE SECTION

Development Economic Finance Consulting LLC
D.B.A.: def Consulting

Town of Munster, Indiana

By: 
Daniel Botich

By: _____

Title: President

Title: _____

Dated: February 13, 2025

Dated: _____

Request for Taxpayer Identification Number and Certification

**Give Form to the
 requester. Do not
 send to the IRS.**

▶ Go to www.irs.gov/FormW9 for instructions and the latest information.

Print or type. See Specific Instructions on page 3.	1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.	
	2 Business name/disregarded entity name, if different from above	
	3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes.	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):
	<input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate	Exempt payee code (if any) _____
	<input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____ Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.	Exemption from FATCA reporting code (if any) _____
	<input type="checkbox"/> Other (see instructions) ▶ _____	<small>(Applies to accounts maintained outside the U.S.)</small>
	5 Address (number, street, and apt. or suite no.) See instructions.	Requester's name and address (optional)
6 City, state, and ZIP code		
7 List account number(s) here (optional)		

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number									
or									
Employer identification number									

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	Signature of U.S. person ▶	<i>Daniel A. Botich</i> Daniel A. Botich, President	Date ▶	February 13, 2025
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General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.



Daniel A. Botich *Da*

President + Economic Development Finance Professional
Development Economic Finance Consulting LLC

Dan founded and established Development Economic Finance Consulting LLC (dba: DEF Consulting) in January 2024 to assist municipal and private clients with land development and economic finance professional services necessary to close on deals, which includes redevelopment and economic development planning as well as economic development finance modeling with to goal of making opportunities a reality to be implemented and constructed.

YEARS OF EXPERIENCE

Industry: 37 years

EDUCATION

Master of Public Affairs - Public Administration
Indiana University School of Public and Environmental Affairs (SPEA)- 2002

Certificate: Public Management
Indiana University School of Public and Environmental Affairs (SPEA)- 1997

Bachelor of Arts
Urban Studies / Economics
Columbia University-New York 1987

TEACHING

Adjunct Professor,
Calumet College of St. Joseph

Undergraduate Programs:
Business Management Department

Master's Programs:
Master of Science in Management Master of Public Administration

PERIODICAL CONTRIBUTOR

"Building Indiana News"
An economic development periodical published bi-monthly.
Crown Point, Ind. Contributing Writer on Economic Development / Financial Incentive topics.
(2016-Present)

D Development
E Economic
F Finance

Consulting LLC



Dan is an economic development, planning and creative financial incentive professional with experience in land use planning, public administration, economic development and municipal finance. He has a technical and practical understanding of state economic development, redevelopment and planning law, entitlement programs, taxable and tax-exempt municipal bonding financings, tax abatement and tax impact studies. He also has extensive knowledge in the management and administration of municipal government and develops strong relationships with key business and community leaders which has resulted in the successful implementation of multiple planning and economic development projects to the benefit of both the public and private sectors.

Dan began his career as a land use/urban design planner which transitioned into economic development and municipal finance as a practical means to implement both publicly supported land-use plans, including master, redevelopment and economic development plans and the supporting resolutions and ordinances necessary to implement projects. He is a prominent and trusted advising consultant in tax increment financings from the planning stages through approval and potential bonding for project implementation. In addition, Dan has prepared economic development tax modeling for private investments, tax impact analyses, fiscal plans for municipal annexations and cost of service studies to complement his land use and economic development expertise.

Dan demonstrates an ability to serve clients' interests to provide creative solutions to unique issues and problems facing the public and private sectors.

Dan also has been an adjunct professor for Calumet College of St. Joseph (Whiting, IN) since 2012 instructing student in the following departmental programs:

Undergraduate Programs:

- Macro- and Micro-economics in the undergraduate Business Management Program.

Master's Candidate Programs:

- Finance Management, Project Management, Operations Management, and Statistical Techniques I in the Master of Science in Management (MSM) Program.
- Fiscal Budgeting, Planning & Public Management in the Masters of Science in Public Administration (MPA) Program, predominantly instructing Chicago Police Department upper-management and Chicago Metropolitan Area police officers and public safety graduate candidate students.

In addition, Dan is a contributing writer on economic development topics for Building Indiana, as published (bi-monthly) by Building Indiana Media Group, a Diversified Marketing Strategies Company.

PAST WORK EXPERIENCE:

- Short Elliott Hendrickson Incorporated (SEH®) – Associate Sr. Economic Development Professional (2016-2024)
- Cender & Company, LLP, Executive – Municipal Financial Advisor (2003-2016)
- Crowe Chizek (Crowe Horwath), Engagement Manager – State & Local Government Group (2000-2003)
- City of Whiting, Indiana, Director of Planning/City Planner (1990-2000)
- Trkla Pettigrew Allen & Payne (TPAP), Chicago, IL. Associate Planner (1987-1990)