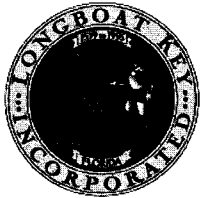


Magda McDowell

From: Howard Tipton
Sent: Monday, April 8, 2024 9:03 AM
To: Susan L. Smith; Magda McDowell; Maggie Mooney
Subject: RE: Tax Attorney invoice

Ok to pay, although at \$600/hour we will certainly want to make any future engagement time as brief as possible.



Howard N. Tipton
Town Manager
Town of Longboat Key
501 Bay Isles Road
Longboat Key, Florida 34228
(941) 316-1999
htipton@longboatkey.org

"Premier Community, Exceptional Service"



Follow the Town
www.longboatkey.org



 **TownofLBK**
 **TownofLBK**
 **townoflbk**
 **@longboatkey7189**

From: Susan L. Smith <ssmith@longboatkey.org>
Sent: Monday, April 8, 2024 8:00 AM
To: Magda McDowell <MMcDowell@longboatkey.org>; Maggie Mooney <mmooney@flgovlaw.com>; Howard Tipton <htipton@longboatkey.org>
Subject: Tax Attorney invoice

Maggie/Tip – Please approve.

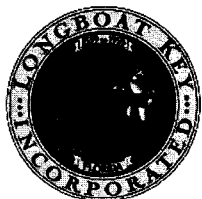
I have confirmed the Teams Meeting on 2/22.

There was another meeting on 3/13 that should be coming.

Magda – Please track this category on your spreadsheet : "Tax Attorney – 401 Plans"

Thank you,

Sue



Susan Smith, CGFO
Finance Director
Town of Longboat Key
501 Bay Isles Road
Longboat Key, Florida 34228
(941) 316-6882
ssmith@longboatkey.org

"Premier Community, Exceptional Service"

Magda McDowell

From: Maggie Mooney <mmooney@flgovlaw.com>
Sent: Monday, April 8, 2024 8:39 AM
To: Magda McDowell
Cc: Susan L. Smith
Subject: RE: Tax Attorney invoice

CAUTION: This Message Is From an External Sender

Exercise caution when opening attachments or clicking links, especially from unknown senders.

Report Suspicious

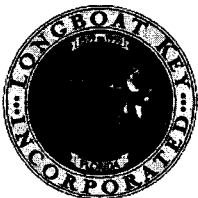
Per Sue's confirmation of services rendered, ok to pay.
-Maggie

Maggie D. Mooney, Esq.
Persson, Cohen, Mooney, Fernandez & Jackson, P.A.
6853 Energy Court
Lakewood Ranch, FL 34240-8523
Office: (941)306-4730
Email: mmooney@flgovlaw.com

Board Certified by the Florida Bar in City, County & Local Government Law

From: Susan L. Smith <:ssmith@longboatkey.org>
Sent: Monday, April 8, 2024 8:00 AM
To: Magda McDowell <MMcDowell@longboatkey.org>; Maggie Mooney <mmooney@flgovlaw.com>; Howard Tipton <htipton@longboatkey.org>
Subject: Tax Attorney invoice

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Thank you,
Sue



Susan Smith, CGFO
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Town of Longboat Key
501 Bay Isles Road
Longboat Key, Florida 34228
(941) 316-6882
ssmith@longboatkey.org

“Premier Community, Exceptional Service”

Ogletree Deakins



**OGLETREE, DEAKINS, NASH,
SMOAK & STEWART, P.C.**

Attorneys at Law

Administrative Office
50 International Drive
Patewood IV, Suite 300
Greenville, SC 29615
Telephone: (864) 241-1801
Facsimile: (864) 241-1908
www.ogletreedeakins.com

March 31, 2024

Susan L. Smith
Finance Director
Town of Longboat Key
501 Bay Isles Road
Longboat Key, FL 34228

Tax Attorney - 401 Plans

PERSONAL AND CONFIDENTIAL

Bill No. 91207239
Client.Matter # 072684.000001

Re: Town of Longboat Key - General Benefits

For professional services rendered through February 29, 2024, in connection with the above-referenced matter as outlined on the attached detailed billing sheets:

Fees	\$2,257.00
Expenses.....	\$0.00
Total Due This Bill.....	\$2,257.00

001-10-11-531.3106 Other Atty

ok to pay / See

Wire Payments		ACH Payments		Check Payments
TD Bank NA	ABA #: 0311-0126-6	TD Bank	ABA #: 053902197	PO Box 89
300 Delaware Ave	Account #: 7100526246	102 South Main St	Account #: 7100526246	Columbia, SC 29202
Wilmington, Delaware 19801	Swift Code: NRTHUS33XXX	Greenville, SC 29601		

Credit to Ogletree Deakins Nash Smoak & Stewart / Please include bill numbers / Federal Tax ID: 57-1044820 / UEI#: HJ1HV7QNBA8

Payable upon receipt. Direct inquiries to the billing attorney or the Account Services Department (864) 241-1801.
If you would like to receive your bills via e-mail, please notify FinOps@ogletreedeakins.com

Atlanta • Austin • Berlin (Germany) • Birmingham • Boston • Charleston • Charlotte • Chicago • Cleveland • Columbia • Columbus • Dallas • Denver • Detroit Metro • Greenville • Houston
Indianapolis • Kansas City • Las Vegas • London (England) • Los Angeles • Memphis • Mexico City (Mexico) • Miami • Milwaukee • Minneapolis • Montréal (Canada) • Morristown
Nashville • New Orleans • New York City • Oklahoma City • Orange County • Paris (France) • Philadelphia • Phoenix • Pittsburgh • Portland, ME • Portland, OR • Raleigh
Richmond • Salt Lake City • St Louis • St. Thomas • Sacramento • San Antonio • San Diego • San Francisco • Seattle • Stamford • Tampa • Toronto (Canada) • Torrance • Tucson • Washington

Susan L. Smith
Finance Director
Town of Longboat Key
501 Bay Isles Road
Longboat Key, FL 34228

Re: Town of Longboat Key - General Benefits

For professional services rendered through February 29, 2024

Date	Initials	Description	Hours	Amount
02/22/24	EDP	Video conference with Nicolette Snyder, Susan Smith, Lisa Silvertooth, and David Wheeler (Graystone – MS) regarding retirement plan correction issues.	0.70	427.00
02/22/24	EDP	Analyze retirement plan correction issues.	1.40	854.00
02/28/24	EDP	Continue analyzing qualified plan correction issues.	1.60	976.00
Total Services:			3.70	2,257.00

Timekeeper Summary

Timekeeper	Title	Rate	Hours	Amount
Eric D. Penkert	Shareholder	610.00	3.70	2,257.00

TOTAL FEES	\$2,257.00
TOTAL EXPENSES	\$0.00
TOTAL THIS BILL	\$2,257.00