



OGLETREE, DEAKINS, NASH,
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April 30, 2024

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

PERSONAL AND CONFIDENTIAL

Bill No. 91236773
Client.Matter # 072684.000001

Re: Town of Longboat Key - General Benefits

For professional services rendered through March 31, 2024, in connection with the above-referenced matter as outlined on the attached detailed billing sheets:

Fees	\$10,801.00
Expenses.....	\$0.00
Total Due This Bill.....	\$10,801.00

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

Credit to Ogletree Deakins Nash Smoak & Stewart / Please include bill numbers / Federal Tax ID: 57-1044820 / UEI#: HJ1HV7QNBAM8

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 March 31, 2024

Date	Initials	Description	Hours	Amount
03/08/24	DSR	Prepare for and hold conference with Eric Penkert regarding operational error for matching contributions on Police 401(a) Plan and Town of Longboat Key 401(a) Plan.	0.70	479.50
03/08/24	EDP	Continue analyzing qualified plan correction issues.	1.90	1,159.00
03/12/24	DSR	Analyze plan documentation for Police 401(a) plan and General 401(a) plan; prepare for and hold conference with Eric Penkert regarding correction methodology for operational errors for matching contributions on Police 401(a) Plan and Town of Longboat Key 401(a) Plan.	3.20	2,192.00
03/12/24	EDP	Continue analyzing scope of 401(a) plan correction issues.	0.70	427.00
03/13/24	DSR	Prepare for and hold conference with Susan Smith, Lisa Silvertooth, Carolyn Brown, Nicolette Snyder, David Wheeler, and Eric Penkert regarding identification of plan errors for Police 401(a) Plan and Town of Longboat Key 401(a) Plan and strategies to bring into compliance.	2.90	1,986.50
03/13/24	EDP	Videoconference with Susan Smith, Lisa Silvertooth and others regarding retirement plan corrections.	1.30	793.00
03/13/24	EDP	Attend additional call with Susan Smith and Lisa Silvertooth regarding additional retirement plan correction issues.	0.30	183.00
03/14/24	EDP	Continue analyzing retirement plan correction issues.	2.80	1,708.00
03/20/24	DSR	Prepare for and hold conference with client team, Nationwide, David Wheeler, and Eric Penkert regarding plan document and operational issues for Police 401(a) plan and General 401(a) plan.	2.20	1,507.00
03/20/24	EDP	Preparation for and videoconference with Nationwide and Longboat teams regarding correction issues.	0.60	366.00
Total Services:			16.60	10,801.00

Timekeeper Summary

Timekeeper	Title	Rate	Hours	Amount
Eric D. Penkert	Shareholder	610.00	7.60	4,636.00
David S. Rosner	Shareholder	685.00	9.00	6,165.00

TOTAL FEES	\$10,801.00
TOTAL EXPENSES	\$0.00
TOTAL THIS BILL	\$10,801.00

Magda McDowell

From: Howard Tipton
Sent: Tuesday, May 7, 2024 11:46 AM
To: Susan L. Smith; Maggie Mooney
Cc: Magda McDowell; Lisa Silvertooth; Carolyn Brown
Subject: RE: Ogletree Deakins invoice 91236773_001.pdf

Categories: Green category

Approved for payment.

Tip







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

"Premier Community, Exceptional Service"



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www.longboatkey.org



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 @longboatkey7189

From: Susan L. Smith <ssmith@longboatkey.org>
Sent: Tuesday, May 7, 2024 8:55 AM
To: Maggie Mooney <mmooney@flgovlaw.com>; Howard Tipton <h tipton@longboatkey.org>
Cc: Magda McDowell <MMcDowell@longboatkey.org>; Lisa Silvertooth <lsilvertooth@longboatkey.org>; Carolyn Brown <CBrown@longboatkey.org>
Subject: Ogletree Deakins invoice 91236773_001.pdf

Morning Tip and Maggie,
I have verified conference call dates and hours.
Please approve for payment.
I will get an update from Eric on where they are with the VCP.
Thank you,
Sue