

TOWN OF PLATTSBURGH
REQUEST FOR PROPOSALS
FOR
PROFESSIONAL AUDITING
SERVICES

TOWN OF PLATTSBURGH
151 BANKER ROAD PLATTSBURGH, NEW YORK 12901

TOWN OF PLATTSBURGH

REQUEST FOR PROPOSALS

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TOWN OF PLATTSBURGH

REQUEST FOR PROPOSALS

I. INTRODUCTION

A. General Information

The Town of Plattsburgh (Town) is requesting proposals from qualified firms of certified public accountants to audit its financial statements for the fiscal years ending December 31, 2026, 2027 and 2028. The audit is to be performed in accordance with generally accepted standards as set forth by the American Institute of Certified Public Accountants, generally accepted government auditing standards set forth for financial audits in the General Accounting Office's (GAO) Government Auditing Standards (1994) and the provisions of the Amended Single Audit Act (1996) and U.S. Office of Management and Budget (OM) Circular A-133 (1997) as well as the following additional requirements:

There is no expressed or implied obligation for the Town of Plattsburgh to reimburse responding firms for any expenses incurred in preparing proposals in response to this request.

An appointment and on-site inspection may be scheduled by any firm interested in submitting a proposal at the Business Office, Plattsburgh, New York to answer questions about the engagement. Any inquiries concerning the request for proposals should be addressed to Jennifer Whitney, Finance Manager.

To be considered, THREE copies of a proposal must be received by the Town Clerk at 151 Banker Road, Plattsburgh, New York 12901 by 4:00 p.m. by July 31, 2026. The Town reserves the right to reject any or all proposals submitted.

During the evaluation process, the Town reserves the right, where it may serve the Town's best interest, to request additional information or clarifications from proposals, or to allow corrections of errors or omissions. At the discretion of the Town, firms submitting proposals may be requested to make oral presentations as part of the evaluation process.

The Town reserves the right to retain all proposals submitted and to use any ideas in a proposal regardless of whether that proposal is selected. Submission of a proposal indicates acceptance by the firm of the conditions contained in this request for proposals, unless clearly and specifically noted in the proposal submitted and confirmed in the contract between the Town of Plattsburgh and the firm selected.

It is anticipated the selection of a firm will be completed by August 6, 2026. Following notification of the selected firm it is expected a contract will be executed between both parties by September 15, 2026.

B. Term of Engagement

A three-year contract is for the fiscal years ending December 31, 2026, December 31, 2027, and December 31, 2028.

C. Subcontracting

No subcontracting will be allowed without the express prior written consent of the Town of Plattsburgh.

II. NATURE OF SERVICES REQUIRED

A. General

The Town of Plattsburgh is soliciting the services of qualified firms of certified public accountants to audit its financial statements for the fiscal years ending December 31, 2026, 2027 and 2028. The audits are to be performed in accordance with the provisions contained in this request for proposals.

In addition, an audit of the financial records of one of the following units each year the contract is in effect ; the Town Clerk, The Tax Receiver and the two Town Justices (2).

The Town may also require the chosen firm to file the Annual Financial Report in a timely manner on the Town's behalf with OSC.

B. Scope of Work to be Performed

The Town of Plattsburgh desires the auditor to express an opinion on the fair presentation of its financial statements in conformity with generally accepted accounting principals.

C. Auditing Standards to be Followed

To meet the requirements of this request for proposals, the audit shall be performed in accordance with:

Generally accepted auditing standards as set forth by the American Institute of Certified Public Accountants, generally accepted government auditing standards set forth in the U.S. General Accounting Office's Government Auditing Standards (2003), the provisions of the Amended Single Audit Act (1996) and the provisions of U.S. Office of Management and Budget (OMB) Circular A-133 (1997).

D. Reports to be Issued

Following completion of the audit of the fiscal year's financial statements, the auditor shall issue:

1. Independent Auditor's Report on Basic Financial Statements with Accompanying Required Supplementary Information and Supplementary Information.
2. Management Discussion and Analysis
3. Statement of Net Positions
4. Statement of Activities
5. Balance Sheet – Town Funds
6. A Reconciliation of Fund Balances to Net Assets at bottom of Balance Sheet – Town funds or a separate Reconciliation of Balance Sheet - Town Funds to the Statement of Net Assets
7. Statements of Revenues, Expenditures, Expenditures and Changes in Fund Balances – Town Funds.
8. Reconciliation of Town Funds Revenues, Expenditures, and Changes in Fund Balances to the Statement of Activities
9. Statement of Fiduciary Net Position – Fiduciary Funds and Statement of Changes in Fiduciary Net Position – Fiduciary Funds
10. Notes to the Financial Statements
11. Schedule of Revenues, Expenditures, and Changes in Fund Balance – Budget and (Non-GAAP Basis) and Actual – General Fund
12. Schedule of Change from Adopted Budget to Revised Budget – General Fund
13. Schedule of use of Unreserved Fund Balance - General Fund (if applicable)
14. Schedule of Project Expenditures – Capital Project fund (if applicable)
15. Combined Balance Sheet – Non-Major Town Funds (if applicable)

16. Combined Statement of Revenues, Expenditures, and Changes in Fund Balance – Non-Major Town Funds (if applicable)
17. Schedule of Investment in Capital Assets, Net of Related Debt
18. Notes to Schedule of Federal Awards (if applicable)
19. Independent Auditor's Report on the Internal Control Structure Based on an Audit of General-Purpose Financial Statements Performed in Accordance with Government Auditing Standards.
20. Independent Auditor's Report on Compliance Based on an Audit of General-Purpose Financial Statements Performed in Accordance with Government Auditing Standards.
21. Schedule of Findings and Questioned Costs (if applicable)
22. Corrective Action Plan for A-133 audit findings for federal awards (if applicable)
23. Independent Auditor's Report on Internal Control Related to the Financial Statements and Major Program (if applicable)
24. Independent Auditor's Report on Compliance with Laws, Regulation, and the Provisions of Contracts or Grant Agreements (if applicable).
25. Annual Financial Report – if requested by The Town.

In the required report(s) on internal controls, the auditor shall communicate any reportable conditions found during the audit. A reportable condition shall be defined as a significant deficiency in the design or operation of the internal control structure, which could adversely affect the organization's ability to record, process, summarize and report financial data consistent with the assertions of management in the financial statements.

Reportable conditions that are also material weaknesses shall be identified as such in the report.

Nonreportable conditions discovered by the auditors shall be verbally reported to management.

Irregularities and Illegal Acts. Auditors shall be required to make an immediate, written report of all irregularities and illegal acts or indications of which they become aware to the Audit Committee of the Board of Education.

Reporting to the Town of Plattsburgh Board. Auditors shall assure themselves that the Town's governing board is informed of each of the following:

1. The auditor's responsibility under generally accepted auditing standards.
2. Significant accounting policies.
3. Management judgments and accounting estimates.
4. Significant audit adjustments.
5. Other information in documents containing audited financial statements.
6. Disagreements with management.
7. Management consultation with other accountants.
8. Major issues discussed with management prior to retention.
9. Difficulties encountered in performing the audit.

E. Special Considerations

1. A list of findings and other weaknesses from the Town's most recent financial statement audit are available upon request.

F. Working Paper Retention and Access to Working Papers

All working papers and reports must be retained, at the auditor's expense, for a minimum of three (3) years, unless the firm is notified in writing by the Town of Plattsburgh of the need to extend the retention period. The auditor is required to make working papers available, upon request, to the following parties or their designees:

Town of Plattsburgh

U.S. General Accounting Office

Parties designated by the federal or state government or by the Town of Plattsburgh as part of an audit quality review process

Auditors of entities of which the Town is a subrecipient of grant funds

In addition, the firm shall respond to the reasonable inquiries of successor auditors and allow successor auditors to review working papers relating to matters of continuing accounting significance.

III. DESCRIPTION OF THE TOWN

A. Name and Telephone Number of Contact Person

The auditor's principal contact with the Town of Plattsburgh will be Jennifer Whitney, Finance Manager, 518-562-6847.

A list of key personnel is attached.

B. Background Information

The Town of Plattsburgh is approximately 48 square miles. The Town offers a variety of services to its residents, including: ambulance services, street maintenance and improvements, water, sewer, snow removal, youth recreation programs and general government support. The Town derives the majority of the moneys to finance these services from real property taxes, sales tax, water and sewer rents, and State aid. The Town's fiscal year begins on January 1 and ends on December 31.

The Town has one bargaining unit that covers highway, water and sewer, and building maintenance personnel (approx. 32), additionally department heads (approx. 10), and office personnel (approx. 14). Total annual payroll is approximately \$4.3 million.

The Town has a total budget of approximately \$24 million and has a five (5) member Town Board which is comprised of the Town Supervisor and four (4) Councilors.

The accounting and financial reporting functions of the Town are centralized. The Town's accounting and financial reporting functions are computerized and fully integrated

More detailed information on the Town and its finances can be found in the Town's latest financial statements and budget documents.

C. Fund Structure

The Town uses the following fund types in its financial reporting:

- General Fund
- Highway Fund
- Storm Drain Fund
- Street Lighting Fund
- Sewer Fund
- Water Fund
- Water and Sewer Fund
- Ambulance Fund
- Capital Fund
- Cemetery Fund
- Custodial Fund

D. Budgetary Basis of Accounting

The Town of Plattsburgh prepares its budget on a basis consistent with a modified accrual basis of accounting. Appropriations lapse at fiscal year end and encumbrances are shown as a reservation of fund balance and are honored through subsequent year's expenditures.

E. Pension and Other Plans

The Town of Plattsburgh participates in the NYS and Local Employees' Retirement System, a cost sharing multiple-employer, public employee retirement systems

F. Component Units and Joint Venture

The Town of Plattsburgh is defined, for financial reporting purposes, in conformity with the Government Accounting Standards Board's Codification of Governmental Accounting and Financial Reporting Standards, Section 2100 (with the source being GASB Statements 14, 34 and 39 and GASB Technical Bulletin 2004-1). Using these criteria, it has been determined that Town does not have a component unit that is included in the Town's financial statements.

G. Magnitude of Finance Operations

All financial accounting and reporting is handled through the business office.

Number of vendors the Town regularly does business with: 350

Number of purchase orders generated in a year: 200

Number of non-payroll checks issued in a year: 2,500

Number of paychecks distributed in a pay period: 75-95

H. Availability of Prior Audit Reports and Working Papers

Interested responders who wish to review prior years' audit reports and management letters should contact Jennifer Whitney at the Business Office, 151 Banker Road, Plattsburgh, New York, 12901. The Town will use its best efforts to make prior audit reports and supporting working papers available to responders to aid their response to this request for proposals.

IV. TIME REQUIREMENTS

A. Proposal Calendar

The following is a list of key dates up to and including the date proposals are due to be submitted:

Request for proposals issued	June 26, 2026
Due date for notification of interest	July 17, 2026

Due date for proposals

July 31, 2026

B. Notification and Contract Dates

Selected firm notified

August 7, 2026

Contract date

September 4, 2026

C. Date Final Report is Due

The report on the financial statements of the Town, Single Audit and Related Reports, are due April 15th.

The final report and six signed copies should be delivered to the Finance Manager at the Business Office. Additionally, the final report should be provided to the Finance Manager in electronic format.

V. ASSISTANCE TO BE PROVIDED TO THE AUDITOR AND REPORT PREPARATION

A. Business Office and Clerical Assistance

The business office staff and responsible supervisory/management personnel will be available during the audit to assist the firm by providing information, documentation and explanations. The preparation of confirmations will be the responsibility of the auditor.

In addition,

B. Electronic Data Processing (EDP) Assistance

Business office staff will be available to assist the auditor in performing the engagement and will provide financial analyses for analytical purposes and prepare detailed supporting schedules for individually significant account balances. In addition, accounting office staff may assist in the preparation of spreadsheets and schedules at the auditor's request.

C. Work Area, Telephones, Photocopying and FAX Machines

The Town of Plattsburgh will provide the auditor with reasonable workspace, desks and chairs. The auditor will also be provided with access to a telephone line, photocopying facilities, internet and a FAX machine subject to minimal use and availability.

D. Report Preparation

Report preparation, editing and printing shall be the responsibility of the auditor.

VI. PROPOSAL REQUIREMENTS

A. General Requirements

1. Submission of Notification of Interest

Firms interested in submitting a proposal must submit, verbally or written, by July 17, 2026, their "Notification of Interest" in the format attached to the letter transmitting this Request for Proposals. Failure to do so will disqualify firms from submitting a proposal.

2. On-site Inspections

An on-site inspection of the Town may be arranged for firms interested in submitting proposals. Accounting Office staff will be available to discuss their areas of responsibility and other Town staff, upon request through the Finance Manager, may be available with a prior scheduled appointment.

3. Inquiries

Inquiries concerning the Request for Proposals and the subject of the Requests for Proposals must be made to:

Jennifer Whitney, Finance Manager
Town of Plattsburgh
151 Banker Road, Plattsburgh, New York 12901
(518) 562-6847
jenniferw@townofplattsburghny.gov

4. Submission of Proposals

The following material is required to be received by (July 31, 2026, for a proposing firm to be considered.

a. A master copy of the Technical Proposal to include the following:

i. Title Page

Title Page showing the request for proposals subject; the firm's name; the name, address and telephone number of the contact person; and the date of the proposal.

ii. Table of Contents

iii. Transmittal Letter

A signed letter of transmittal briefly stating the responder's understanding of the work to be done, the commitment to perform the work within the time period, a statement why the firm believes itself to be best qualified to perform the engagement and a statement that the proposal is a firm and irrevocable offer.

iv. Detailed Proposal

The detailed proposal should follow the order set forth in Section VI B of this Request for Proposals.

- b. The proposal shall submit a dollar cost bid in a sealed envelope marked as follows:

SEALED DOLLAR COST BID PROPOSAL
FOR
TOWN OF PLATTSBURGH

FOR
PROFESSIONAL AUDITING SERVICES

- c. Proposers should send the completed proposal consisting of the two separate envelopes to the following address:

Town Clerk
Town of Plattsburgh
151 Banker Road
Plattsburgh, New York 12901

B. Technical Proposal

- General Requirements

The purpose of the Technical Proposal is to demonstrate the qualifications, competence, and capacity of the firms seeking to undertake an independent audit of the Town of Plattsburgh in conformity with the requirements of this Request for Proposals. As such, the substance of proposals will carry more weight than their form or manner of presentation. The Technical Proposal should demonstrate

the qualifications of the firm and of the particular staff to be assigned to this engagement. It should also specify an audit approach that will meet the Request for Proposals requirement.

THERE SHOULD BE NO DOLLAR UNITS OR TOTAL COSTS INCLUDED IN THE TECHNICAL PROPOSAL DOCUMENT.

The Technical Proposal should address all the points outlined in the Request for Proposals (excluding any cost information which should only be included in the sealed dollar cost bid). The proposal should be prepared simply and economically, providing a straightforward, concise description of the proposer's capabilities to satisfy the requirements of the Request for Proposals. While additional data may be presented, the following subjects, items Nos. 2 through 9, must be included. They represent the criteria against which the proposal will be evaluated.

- Independence

The firm should provide an affirmative statement that it is independent of the Town of Plattsburg has defined by generally accepted auditing standards/the U.S. General Accounting Office's Government Auditing Standards (1994).

- Prior single Audit Experience

The firm should include prior or current engagements pursuant to the Amended Single Audit Act and Office of Management and Budget Circular A-133.

- Firm Qualifications and Experience

The proposer should state the size of the firm, the size of the firm's governmental audit staff, the location of the office from which the work on this engagement is to be performed and the number and nature of the professional staff to be employed in this engagement on a full-time basis and the number and nature of the staff to be so employed on a part-time basis.

The firm is also required to submit a copy of the report on its most recent external quality control review, with a statement whether that quality control review included a review of specific government engagements.

The firm shall also provide information on the results of any federal or state desk review or field reviews of its audits during the past three (3) years. In addition, the firm shall provide information on the circumstances and status of any disciplinary action taken or pending against the firm during the past three (3) years with the state regulatory bodies or professional organizations.

- Partner, Supervisory and Staff Qualifications and Experience

Identify the principal supervisory and management staff, including engagement partners, managers, other supervisors and specialists, who would be assigned to the engagement. Indicate whether each such person is registered or licensed to practice as a certified public accountant in New York State. Provide information on the government auditing experience of each person, including information on relevant continuing professional education for the past three (3) years and membership in professional organizations relevant to the performance of this audit.

Provide as much information as possible regarding the number, qualifications, experience and training, including relevant continuing professional education, of the specific staff to be assigned to this engagement. Indicate how the quality of staff over the term of the agreement will be assured.

Engagement partners, managers, other supervisory staff and specialists may be changed if those personnel leave the firm, are promoted or are assigned to another office. These personnel may also be changed for other reasons with the express prior written permission of the Town. However, in either case, the Town retains the right to approve or reject replacements.

Consultants and firm specialists mentioned in response to this Request for Proposals can only be changed with the express prior written permission of the Town, which retains the right to approve or reject replacements.

Other audit personnel may be changed at the discretion of the Proposer provided that replacements have substantially the same or better qualifications or experience.

- **Similar Engagements with Other Town**

For the firm's office that will be assigned responsibility for the audit, list the most significant engagements (maximum 5) performed in the last five years that are similar to the engagement described in the Request for Proposals.

Indicate the scope of work, date, engagement partners, total hours, and the name and telephone number of the principal client contact.

- **Specific Audit Approach**

The proposal should set forth a work plan, including an explanation of the audit methodology to be followed, to perform the services required in Section II of this request for Proposals. In developing the work plan, reference should be made to such sources of information as the Town's budget and related materials, organizational chart, programs, and financial and other management information systems.

**NO DOLLARS SHOULD BE INCLUDED IN THE TECHNICAL
PROPOSAL**

Proposers will be required to provide the following information on their audit approach:

- a. Proposed segmentation of the engagement.
- b. Level of staff and number of hours to be assigned to each proposed segment of the engagement.
- c. Sample size and type and extent of testing
- d. Approach to be taken to gain and document an understanding of the Town's internal control structure.
- e. Approach to be taken in determining laws and regulations that will be subject to audit test work.
- f. Approach to be taken in drawing audit samples for purposes of tests of compliance.
- Identification of Anticipated Potential Audit Problems
The proposal should identify and describe any anticipated potential audit problems, the firm's approach to resolving these problems and any special assistance that will be requested from the Town.
- Report Format

The proposal should include sample formats for required reports.

C. Sealed Dollar Cost Bid

1. Total All-Inclusive Maximum Price

The sealed dollar cost bid should contain all pricing information relative to performing the audit engagement as described in this Request for Proposals. The total-inclusive maximum price to be bid is to contain all direct and indirect costs including all out-of-pocket expenses.

The Town will not be responsible for expenses incurred in preparing and submitting the technical proposal or the sealed dollar cost bid. Such costs should not be included in the proposal.

The first page of the sealed dollar cost bid should include the following information:

- a. Name of firm
 - b. Certification that the person signing the proposal is entitled to represent the firm, empowered to submit the bid, and authorized to sign a contract with the Town.
 - c. A total All-Inclusive Maximum Price for the December 31, 2026 _____, December 31, 2027 _____ and December 31, 2028 _____, engagement .
 - d. A total All-Inclusive Maximum Price for audit of the financial records of one of the following units: the Town Clerk, the Tax Receiver and the two Town Justices for the Year ended the December 31, 2026 _____, December 31, 2027 _____, and December 31, 2028 _____.
 - e. A total All-Inclusive Maximum Price for the completion and submission of the Annual Financial Report for the Year ended the December 31, 2026 _____, December 31, 2027 _____, and December 31, 2028 _____.
2. Rates by Partner, Specialist, Supervisory and Staff Level Times Hours Anticipated for Each.
 3. Rates for Additional Professional Services
 4. Manner of Payment
Progress payments will be made on the basis of hours of work completed during the course of the engagement and out-of-pocket expenses incurred in accordance with the firm's dollar cost bid proposal. Ten percent (10%) will be withheld from each billing pending delivery of the firm's final reports.

VII. FINAL SELECTION

- A. Town Board will approve a firm based upon the recommendation of the Supervisor and Finance Manager.

B. It is anticipated that a firm will be selected by August 6, 2026. Following notification of the firm selected, it is expected a contract will be executed between both parties by September 4, 2026.

C. Right to Reject Proposals

Submission of a proposal indicates acceptance by the firm of the conditions contained in this Request for Proposals unless clearly and specifically noted in the proposal submitted and confirmed in the contract between the Town and the firm selected.

The Town reserves the right without prejudice to reject any or all proposals.

APPENDIX A

LIST OF KEY PERSONNEL

Elected Officials

- **Charles Kostyk, Town Supervisor:** 518-562-6810
- **Dana Isabella, Councilor/Deputy Supervisor:** 518-562-6810
- **Daniel Bosley, Councilor:** 518-562-6810
- **Ilona Kelting, Councilor:** 518-562-6810
- **Town Wood, Councilor:** 518-562-6810
- **Jackie Bellew, Tax Receiver:** 518-562-6835
- **Jonathan White, Town Clerk:** 518-562-6830
- **James Joyce, Town Justice:** 518-568-6870
- **Kristopher Michaud, Town Justice:** 518-568-6870
- **Greg Burnell, Highway Superintendent:** 518-562-6880

Town Employees

- **Jennifer Whitney, Finance Manager/Budget Officer:** 518-562-6839
- **Scott Stoddard, Water and Wastewater Director** 518-562-6890

APPENDIX B

PROPOSER GUARANTEES

- I. The Proposer certifies it can and will provide and make available, as a minimum, all services set forth in Nature of Services Required.
- II. The Proposer has read Appendix and Contractual Requirements and agrees that the rights and prerogatives as detailed are retained by the Town of Plattsburgh.
- III. The Proposer agrees to be bound by the contractual requirements delineated in Appendix.

Signature of Official:

Name (typed):

Title:

Firm:

Date:

APPENDIX C

PROPOSER WARRANTIES

- I. Proposer warrants that it is willing and able to obtain an errors and omissions insurance policy providing a prudent amount of coverage for the willful or negligent acts, or omissions of any officers, employees or agents thereof.
- II. Proposer warrants that it will not delegate or subcontract its responsibilities under an agreement without the prior written permission of the Town of Plattsburgh.
- III. Proposer warrants that all information provided by it in connection with this proposal is true and accurate.

Signature of Official:

Name (typed):

Title:

Firm:

Date:

APPENDIX D

NON-COLLUSIVE BIDDING CERTIFICATE

Made pursuant to Section 103-d of the General
Municipal Law of the State of New York

By submission of this bid, each bidder and each person signing on behalf of any bidder certified, and, in the case of a joint bid, each party thereto certifies as to its own organization, under penalty of perjury that to the best of knowledge and belief:

1. The prices in this bid have been arrived at independently without collusion, consultation, communication, or agreement, for the purpose of restricting competition, as to any matter relating to such prices with any other bidder or with any competitor;
2. Unless otherwise required by law, the prices which have been quoted in this bill have not been knowingly disclosed by the bidder and will not knowingly be disclosed by the bidder prior to opening, directly or indirectly, to any other bidder or to any competitor;
3. No attempt has been made or will be made by the bidder to induce any other person, partnership or corporation to submit or not to submit a bid for the purpose of competition.

Verification by Subscription and Notice under Penal Law Section 210.45

It is a crime, punishable as a Class A Misdemeanor under the laws of the State of New York, for a person, in and by a written instrument, to knowingly make a false statement, or to make a statement which such person does not believe to be true.

Affirmed under penalty of perjury.

By: _____

Title: _____

Sworn to before me this _____
day of _____, 2026

Notary Public

APPENDIX E

SCHEDULE OF AUDIT QUOTATIONS

	AS PROPOSED		
	<u>2026</u>	<u>2027</u>	<u>2028</u>
Audit of general-purpose financial statements, and All other services not separately listed below.	_____	_____	_____
Audit of the financial records of one of the following Each year in conjunction with the general audit: the Town Clerk, Tax Receiver, and Town Justices (2)	_____	_____	_____
Single Audit (If Applicable)	_____	_____	_____
Annual Financial Report (If Requested)	_____	_____	_____
TOTAL ALL-INCLUSIVE MAXIMUM PRICE	\$ _____	\$ _____	\$ _____

APPENDIX F

SCHEDULE OF FEES FOR ADDITIONAL SERVICES AND AUDITS IF REQUESTED BY TOWN OF PLATTSBURGH

	<u>HOURLY RATE</u>
PARTNERS	_____
MANAGERS	_____
SUPERVISORY STAFF	_____
STAFF	_____
OTHER (SPECIFY)	_____