



STATEMENT OF WORK
Between Town of Yorktown, IN (“CLIENT”)
and Stone Municipal Group (“SMG”)

October 4, 2024

To Mr. Chase Bruton,

Thank you for the opportunity to assist the Town of Yorktown, IN with financial and accounting consulting services. To assist your team on financial consulting services related to town and utility budget planning, we would suggest the following scope of services:

Budget Advisory Services

- Level 1:
 - Annual Budget Calendar Preparation
 - Sustainability Report
 - Tax Rate Forecast
 - Levy Recommendations
 - Budget Policy Review
 - Investment Guidance
 - Ad hoc Questions
 - Current Year Spend Forecast
 - Process Improvements
 - Levy Appeal Petitions
 - Limited GATEWAY Assistance for Budget
- Level 2:
 - Level 1 plus:
 - Full GATEWAY Support for Budget
 - Involvement with departments on budget requests
 - Personnel Cost forecasting
 - 3 Year Plan
 - Utility Budget Preparation

Management Representatives

Chase Bruton, Town Manager

Fee Structure

Compensation for the above services will be:

Level 1 will be billed at \$4000 per month

Level 2 will add an additional \$2500 per month, total of \$6500 per month

Project Authorization

If you are in agreement with the proposed approach, fees, and expenses outlined herein, please sign and date below and return one copy at your earliest convenience via email.

Thank you for the opportunity to work with you and your team on this important project.

Best regards,

Adam D. Stone, CPA

Adam Stone | Stone Municipal Group

I hereby accept the terms and conditions of the aforementioned project provided to the Town of Yorktown and Stone Municipal Group.

Level of Service Requested (1 or 2) _____

Signature of Acceptance

Date of Acceptance

Printed Name and Title