

LEGISTAR # 200509
Attachment M

EXHIBIT C

REFERENCES FORM

Company Name of Bidder: Lippes Mathias Wexler Friedman LLP

Provide current contact information for three references of similar scope performed within the past three years.

✓

1 Dates services were provided February 2021 to April 2021
Company Name _____
Address 57 Lake Road
City/State/Zip Morristown, New Jersey 07960
Contact Name Nicole Keenan
Phone Number (847) 971- 8963
Email Address nicolepariano@gmail.com

✓ 2

Dates services were provided September 2020- December 2020
Company Name _____
Address 194 Ashby Landing Way
City/State/Zip St. Augustine, FL 32086
Contact Name Julie Frady
Phone Number (904) 386-4900
Email Address julesfradyn@gmail.com

✓ 3

Dates services were provided May 2020-February 2021
Company Name _____
Address 1031 1st Street South, Apt. 403
City/State/Zip Jacksonville Beach, Florida 32250
Contact Name Melissa Schultz
Phone Number (904) 233-5764
Email Address _____

REFERENCE CHECK

Bid Title: Probate Legal Services for Heirs Property Program Bid#: CRAX-210034-GD

COMPANY NAME

REFERENCE INFORMATION BASED ON REFERENCES PROVIDED IN FIRM'S RESPONSE TO BID SOLICITATION.						
COMPANY	Lipps Mathias Wexler Friedman LLP					
ADDRESS						
PHONE						
PERSON CONTACTED	Julie Frady 904-386-4900					
DATE CONTACTED	6/1/2021					
What services were provided?:	Probate - Estate planning, probate on mothers will, advance direction					
QUESTION	5 Excellent	4 Good	3 Average	2 Fair	1 Poor	
1 Rate the level of customer service you feel this firm provides. Quick efficient, open communication emails	X					
2 Rate this company's resource personnel allocation in maintaining your account.	X					
3 Rate the accuracy of this firm's invoicing.	X					
4 Rate this firm's adherence to <u>schedules</u> in your contract specifications.	X					
5 Rate this firm's response to emergency requests. Urgent Estate, 3 days, turnaround	X					
6 What is your overall evaluation of this firm – based on your experience? Excellent communication, knew nothing, but Lipps was very friendly, prefers lots	X					
GRAND TOTAL						

Signature of Person Completing Reference Check: Cheleen Baskatos Date 6/1/2021

REFERENCE CHECK

Bid Title: Probate Legal Services for Heirs Property Program Bid#: CRAX-210034-GD
COMPANY NAME

REFERENCE INFORMATION BASED ON REFERENCES PROVIDED IN FIRM'S RESPONSE TO BID SOLICITATION.					
COMPANY	<i>Lippes Mathias Wexler Friedman LLP</i>				
ADDRESS					
PHONE					
PERSON CONTACTED	<i>Nicole Keenan 847-971-8963</i>				
DATE CONTACTED	<i>3/20/2021</i>				
What services were provided?:	<i>probate w/Mother's Estate</i>				
QUESTION	5 Excellent	4 Good	3 Average	2 Fair	1 Poor
1 Rate the level of customer service you feel this firm provides. <i>Responsive, Answered Questions</i>	✓				
2 Rate this company's resource personnel allocation in maintaining your account.	✓				
3 Rate the accuracy of this firm's invoicing.	✓				
4 Rate this firm's adherence to schedules in your contract specifications. <i>Quick</i>	✓				
5 Rate this firm's response to emergency requests. <i>N/A</i>					
6 What is your overall evaluation of this firm – based on your experience? <i>Alessandro Appito - great to work with</i>	✓				
GRAND TOTAL					

Signature of Person Completing Reference Check: *Chelsea Bakaitis* Date *6/1/2021*

REFERENCE CHECK

Bid Title: Probate Legal Services for Heirs Property Program Bid#: CRAX-210034-GD

COMPANY NAME

REFERENCE INFORMATION BASED ON REFERENCES PROVIDED IN FIRM'S RESPONSE TO BID SOLICITATION.						
COMPANY	Lipps Mathias Wexler Friedman LLP					
ADDRESS						
PHONE						
PERSON CONTACTED	Melissa Schultz 904-233-5764					
DATE CONTACTED	6/1/2021 - left Voicemail ^{no} Email					
What services were provided?:	mothers property in probate, mothers name on House deed not property deed → Melissa appointed,					
QUESTION		5 Excellent	4 Good	3 Average	2 Fair	1 Poor
1	Rate the level of customer service you feel this firm provides. Berkenger - paralegal for Alesandra good	X				
2	Rate this company's resource personnel allocation in maintaining your account. Not huge deal - good	X				
3	Rate the accuracy of this firm's invoicing. Spot on	X				
4	Rate this firm's adherence to schedules in your contract specifications. Always Accommodating →	X				
5	Rate this firm's response to emergency requests. did have last minute [Property Recorded wrong originally]	X				
6	What is your overall evaluation of this firm – based on your experience? Very Accommodating Communication Always in contact	X				
GRAND TOTAL						

Signature of Person Completing Reference Check: Chelsea R. Katry Date 2/7/2021