

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

julesfradyrn@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	Lippes mathias we xler 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 advanced direction				
QUESTION	5 Excellent	4 Good	3 Average	2 Fair	1 Poor
1 Rate the level of customer service you feel this firm provides. <u>Quick efficient, good Communication emails</u>	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. <u>Urgent Estate, 3-5 days, turnaround</u>	X				
6 What is your overall evaluation of this firm – based on your experience? <u>Excellent Communication, ^{She} knew nothing, But Lippes was very friendly, Prefers lots</u>	X				
GRAND TOTAL					

Signature of Person Completing Reference Check:

Chelene Bakato

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	Lippes Mathias Wexler Friedman LLP				
ADDRESS					
PHONE					
PERSON CONTACTED	Nicole Keenan 847-971-8963				
DATE CONTACTED	5/20/2021				
What services were provided?: probate w/ Mother's Estate					
QUESTION	5 Excellent	4 Good	3 Average	2 Fair	1 Poor
1 Rate the level of customer service you feel this firm provides. Responsive, Answered Questions	✓				
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. Quick	✓				
5 Rate this firm's response to emergency requests. N/A					
6 What is your overall evaluation of this firm – based on your experience? Alejandro Appio - great to work with	✓				
GRAND TOTAL					

Signature of Person Completing Reference Check: Cheba Bakatio 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	Lippes 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. Ballenger - paralegal for Alexandra good	X				
2 Rate this company's resource personnel allocation in maintaining your account. no 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 ^{properly Recorded} wrong originally	X				
6 What is your overall evaluation of this firm - based on your experience? Very Accommodating / Communicative Always in contact	X				
GRAND TOTAL					

Signature of Person Completing Reference Check:

Chelsea J. Kater

Date

6/7/2021