



PROCUREMENT SERVICES

ADDENDUM TO CONTRACT DOCUMENTS

ADDENDUM NO.: 1

SOLICITATION NAME: ITN No. N237460LN – Real Estate Brokerage Services for Acquiring, Selling, and/or Exchanging Sites for Future Schools and Support Services

DATE OF ISSUE: June 13, 2023

The following information shall be included in the ITN documents and is hereby made part of the contract documents in the form of clarification, addition, deletion or revision to the contract specifications.

NOTE: Questions from Vendors are posted exactly as they were received.

PROPOSERS' QUESTIONS/ISSUES AND DISTRICT ANSWERS (DISTRICT ANSWERS ARE ITALICIZED):

Q1. Broker to provide 3 years of financial statements. This is broad. We want to clarify who's financials you are requesting the lead Broker personal financials or the Broker's company?

A1. *The District is requesting the financial records of the broker's firm.*

Q2. What type of financial statements are you requesting? Tax returns or Profit and Loss statements?

A2. *The District is looking for the generalized profit/loss statements. Did your firm sell/buy any property in the past 3 years? If so, did you turn a net profit at the end of the year or take a loss.*

Q3. How do we protect confidentiality? How do we submit as we prefer not with the proposal?

A3. *You can protect confidentiality by labeling properties bought/sold by just their acreage and city.*

Q4. How do we submit as we prefer not with the proposal?

A4. *We have added a Financial (Confidential) section in Bonfire to the Submission Information. Please upload all confidential financial documents to this section.*

Q5. How will the financial statements be used for the evaluation process?

A5. *This information will help us determine if the brokerage firm is actively engaged in buying and selling properties.*

There are no other changes/notifications at this time. Please acknowledge this addendum via: ITN No. N237460LN - Fillable Forms - Attachment B, Addenda Acknowledgement Form, in your submittal.

Thank you for your interest in The School District of Lee County.

Lorie Nein
Procurement Coordinator