University Park Recreation District

3501 Quadrangle Blvd., Suite 270, Orlando, FL 32817
Phone: 407-723-5900 Fax: 407-723-5901
http://universityparkrd.com/

The **University Park Recreation District Board of Supervisors' Workshop** will be held on **Monday, October 19, 2026, starting at 8:00 AM** at the Business Offices located at 8301 The Park Boulevard, University Park, FL 34201 and virtually.

Meeting ID: 648 161 1158 **Passcode: 597609**

Join meeting via Zoom:
https://us02web.zoom.us/j/6481611158?pwd=eWEwQ01tWUFSNDJRTUpNbCtoQmpHUT09&omn=84588938513
Join via mobile: +16469313860,,6481611158#,,,,*597609# US
+19292056099,,6481611158#,,,,*597609# US (New York)

BOARD OF SUPERVISORS' MEETING AGENDA

Organizational Matters

- Call to Order
- Roll Call to Confirm Quorum
- Public Comment Period

Workshop Matters

1. Presentations by Club Management Companies
    a. Hampton Golf
    b. Berman
    c. Troon
    d. FrankCrum

Date	Meeting Type	Time	Location	Note
October 27, 2026	Board of Supervisors' Meeting	2:00 PM	University Park	Business Offices
November 13, 2026	Board of Supervisors' Meeting	2:00 PM	University Park	Business Offices
November 24, 2026	Board of Supervisors' Meeting	2:00 PM	University Park	Business Offices
December 11, 2026	Board of Supervisors' Meeting	2:00 PM	University Park	Business Offices
December 29, 2026	Board of Supervisors' Meeting	2:00 PM	University Park	Business Offices

Adjournment

pfm



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Why Hampton Golf:
A True Partner, Not a Portfolio Number

University Park Country Club is not a routine pursuit for Hampton Golf. A flagship club, exceptionally well positioned, with an obligation to serve Members and Guests at the highest level — this is exactly the kind of assignment our company was built for, and exactly the kind of assignment we know competitors will chase hard. We are not treating this engagement as one submission among many. We are treating it as one of the most important opportunities for Hampton Golf.

That means UPCC should expect a level of proactivity, process discipline, and professionalism from Hampton Golf that goes beyond what any other respondent is prepared to offer. It means UPCC's leadership team gets our leadership team, not a regional account manager reading from a script. It means the brand overhaul, the vendor partnerships, the audience-specific programming, the marketing systems, and the financial controls described in this proposal are not aspirational language — they are the specific, disclosed plan we intend to execute from day one.

University Park Country Club deserves a management partner with more than operational competence — every credible management company can claim that. What it needs is a partner who will work harder for this property than any competitor in the room, who is willing to be evaluated the way Hampton Golf is asking to be evaluated — fee structure tied to real performance, senior leadership personally accountable for the outcome, and a portfolio small enough that UPCC is never just a line on someone else's dashboard — and who understands exactly how much this partnership matters, to UPCC and to Hampton Golf alike.

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No Other Partner Will Be As Close to
University Park Country Club

No Business Development Team.

You Are Working With The Team That Will Support,
Serve, and Manage Your Property.

University Park Country Club's Success Is Our Priority,
And We Must Earn Your Business Each Month.

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Modestly Sized by Design:
Better Service, Sharper Focus, Deeper Partner Knowledge

UPCC will very likely receive proposals from larger portfolio management companies. Hampton Golf could have chased a similar scale over the last 27 years and chose not to.

Our experience across more than a quarter-century in the industry is consistent and deliberate: **bigger is not better**. Hampton Golf grows on a measured, tested pace, a net addition of three managed clubs or communities every 12 months, specifically so the company never outgrows the closeness, responsiveness, and service quality it provides to each partner.

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Modestly Sized by Design:
Better Service, Sharper Focus, Deeper Partner Knowledge

Better service: With a modestly sized portfolio, Hampton Golf's executive team is personally and directly involved in each managed property. Our leadership team knows each property by name, walks in person, and answers for directly.

Sharper focus: No other club and golf course management company in the industry provides the level of technical and strategic marketing and sales support that Hampton Golf builds in-house and applies to each property individually.

Deeper partner awareness and knowledge: Hampton Golf's growth discipline means our team has the time to genuinely learn a partner's community, history, and relationships. UPCC would be working with and supported by a partner who is wholly focused on the club’s success, not one competing property among hundreds.

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- **Management Fee:** $13,900.00 per month
  - Management
    - Human Resources
    - Marketing/Sales
    - Operations
    - Lifestyles Programming
    - Buying Programs
    - Accounting
- **Performance Assurance (Year 1):** $4,000 reduction in management fees if the net monthly NOI budget is not met. If the net-quarter NOI budget is met, monthly management fees are recaptured.
- **Performance Bonus (Year 2 forward):** 11% of Net Operating Income Improvement, only when budget is attained. No performance bonus if budget is missed.
- **No Long-Term Agreement, Cancel with 60-Day Notice**

We Must Earn Your Business Each Month.

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True Partnership Fee Structure — We Share the Risk, Not Just the Upside

This relationship is a big deal to Hampton Golf. This is not simply about collecting a management fee regardless of the outcome; we have built our proposed compensation structure to share meaningful operating risk directly.

Most national management companies collect their base fee whether UPCC hits its numbers or not. Hit the budget, they get paid. Miss the budget by 20%, they still get paid. Hampton Golf's proposed structure is different by design: a meaningful share of our compensation is tied to the performance commitments we make, and our proposal includes an explicit mechanism by which our fee is reduced if we fail to deliver what we said we would. That is not a marketing claim — it is a specific, disclosed formula.

If Hampton Golf does not do what it says it will do, management fees are reduced. That is what a true partnership means, and it is the standard we are asking UPCC to hold us to.

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Detailed List of Services to be Provided

As operations manager of UPCC, Hampton Golf will be responsible for turnkey operations to include:

- **Operations** – Club operations, golf course maintenance, golf operations, golf events and customer relations, other course activities programming, merchandising, financial reporting and accounting, HR, and other services related to the day-to-day operations.
- **Recruitment and Staffing** – All employees will be Hampton Golf employees. Our philosophy is to "retain and retrain" existing staff to ensure continuity of service and club goodwill. We desire to hire locally to fill vacant positions, drawing on local knowledge and relationships. Our goal is to build a staff passionate about being part of the operations team, ensuring uncompromised member and club service and attention to detail.
- **Business Planning** – Each year, Hampton Golf will develop and submit for your review and approval, a business plan and operating budget which includes:
    - Proposed marketing, sales, promotion, advertising, and public relations strategies for the property
    - Monthly detailed revenues and expenses for all departments
    - A description of the assumptions upon which the following year's operating budget is based
- **Sales & Marketing** – Hampton Golf will be responsible for creating and implementing creative sales and marketing plans.
- **Agronomy** – Hampton Golf will implement golf course maintenance standards to assure matchless course conditioning and facility wide resource conservation.
- **Finance, Accounting & Financial Reporting** – Hampton Golf will implement financial controls and provide customized financial reports for your review. We will provide a monthly profit-and-loss statement and other financial information for review and discussion.

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Detailed List of Services to be Provided

- **Buying Power** – Hampton Golf will leverage its National Accounts buying power to purchase supplies, maintenance equipment, golf shop merchandise, wine/spirits, food, etc., and pass on the discount savings to you.
- **Technology** – Hampton Golf will implement an integrated marketing technology plan. This includes ensuring that the club's point of sale system, reservations system, and website are all integrated to obtain member/guest data, playing and purchasing habits, family and guest preferences.
- **Golf Shop / Merchandising** – Hampton Golf will develop a comprehensive merchandising plan targeted toward our customer profiles. We will implement a buying plan to maximize a variety of selections and appropriate price points with efficient inventory levels.
- **Inventory Controls** – Hampton Golf will implement a comprehensive sales and inventory control plan for the Golf Shop merchandise and food and beverage department to ensure an optimal Cost of Goods Sold (COGS) ratio.
- **Capital Improvements** – Hampton Golf will develop a yearly capital improvements plan and a 5-year long-range plan (LRP) to assist in making informed business decisions. Recommendations will be based on improvements we believe are necessary to compete in the marketplace and drive revenues.
- **Best Practices** – Hampton Golf policies and best management practices, from over 27 years of experience, will be implemented at all levels of the operation to ensure peak performance.
- **Ongoing Communication** – An Executive will either meet with you in person or teleconference with you monthly, or more often if requested, to discuss property operations, sales, marketing, golf course maintenance, or any other pertinent items regarding the operations of the course.

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We Exist to **Serve.**



Our brand starts with a clear commitment: We exist to serve. Everything we do, from how we partner with clients to how we show up for guests, is designed to turn that purpose into lived experiences.

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We prioritize **Transparency.**



Our approach is built on transparency and accountability. We provide a clear understanding of fees, an agnostic approach to vendors, and no markup on pass-through costs, all supported by detailed, timely reporting. Above all, we are committed to in-person oversight, training, and building a true, long-term relationship.

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University Park Country Club

Brand First.



Everything we do is built around protecting and elevating the UPCC brand. By keeping memberships, operations, and data with the property, we create a flexible partnership that feels personal and authentic. Our team provides the expertise to strengthen market position and expertly guide a rebranding strategy.

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Elevate Member and Guest **Experiences.**

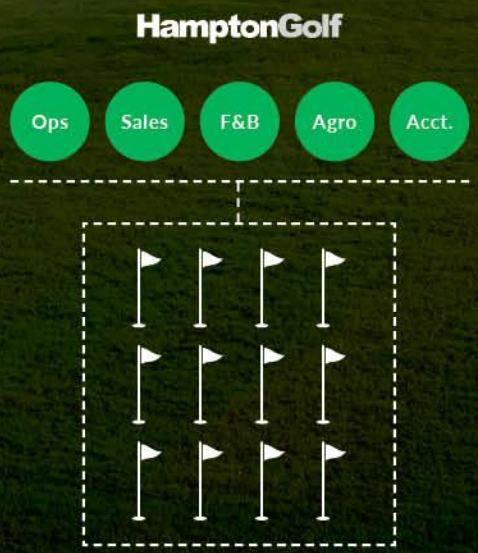


We deliver customer-focused training that consistently meets luxury-level service expectations. Through regular surveys of both Members/Guests and staff, we maintain a culture of continuous improvement. Our custom-built, proprietary systems allow us to measure performance, refine operations, and enhance the overall club experience.

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Disciplined Client Capacity Model and Modestly Sized, on Purpose







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The success with

Our approach

We consistently achieve a higher NPS score than industry standard based on client surveys.

NET PROMOTER SCORES

- 77 STARBUCKS
- 69 HamptonGolf
- 67 NETFLIX
- 61 APPLE
- 58 CHICK-FIL-A
- 52 HARLEY DAVIDSON
- 44 PROFESSIONAL SERVICES BENCHMARK
- 38 AIRBNB
- 35 COSTCO

27+ Years of Service

Our first client in 1999 is still a client today.

8 Years

Average tenure of our clients

98% of our Clients

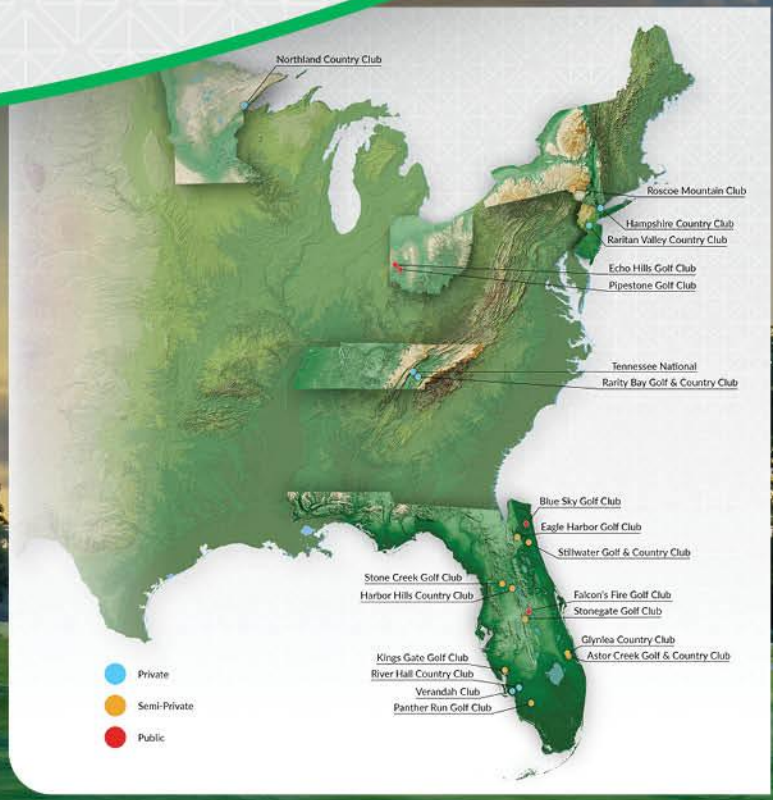
Rate our value as Excellent

98% Retention Rate

We focus on a long-term partnership

36 Partners

We manage properties in 7 states (SC not pictured)



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You Are In
Good Company



Tara Golf and Country Club
- Member-Owned
- Private Club
- Community Focused
- Partners since 2023



Laurel Oak Country Club
- Member-Owned
- Private Club
- Exclusivity Focused
- Partners since 2018



Raritan Valley Country Club
- Member-Owned
- Private Club
- Exclusivity Focused
- Partners since 2026



Club at Del Webb Naples
- Owned by Pulte Group
- Private Club
- Lifestyle Focused
- Partners since 2011



Glen Kernan Club
- Member-Owned
- Private Club
- Exclusivity Focused
- Partners since 2024



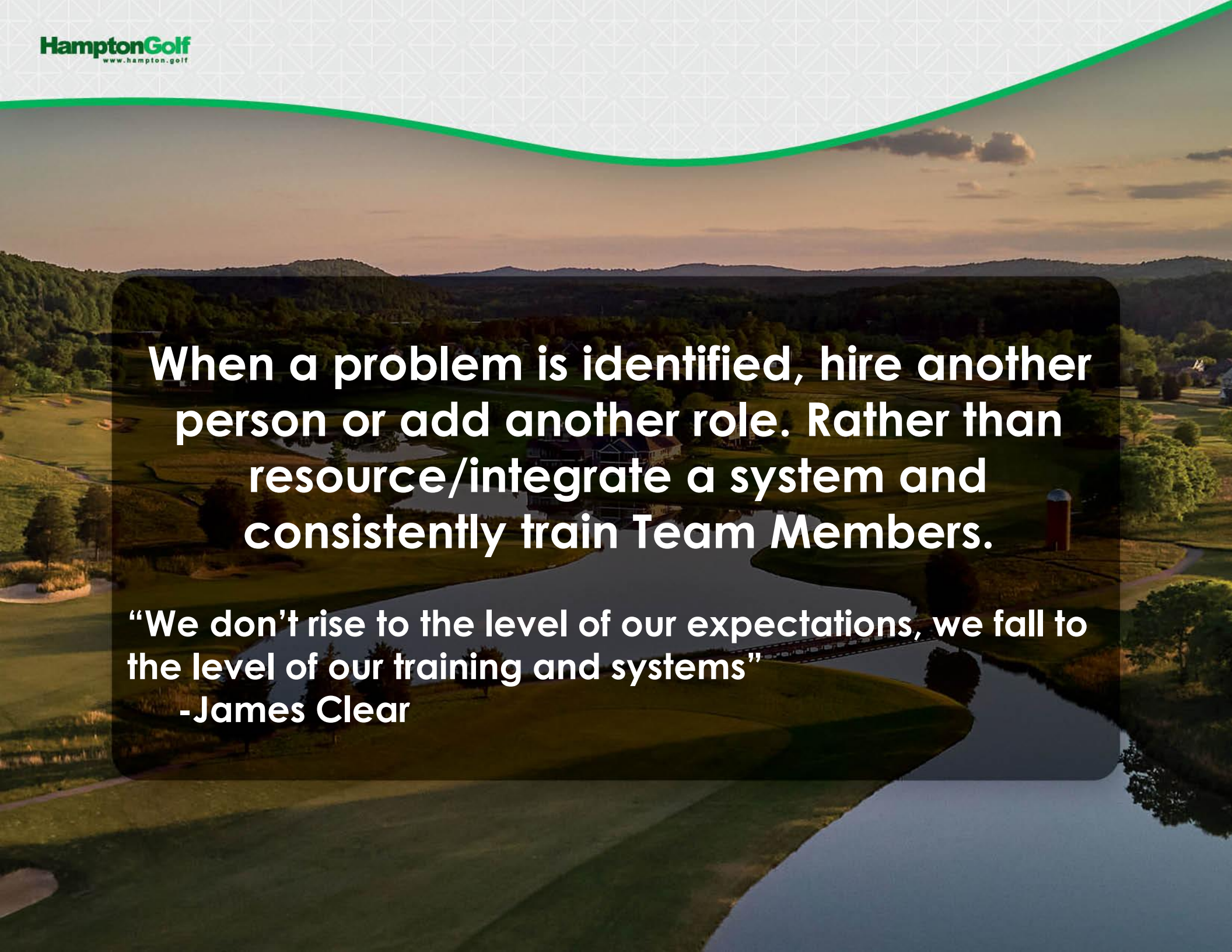
Verandah Club
- Owned by Kolter Land
- Private Club
- Community Focused
- Partners since 2013

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WHAT WE HEARD, WHERE WE WOULD START


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Compensation for leadership positions with no incentive plan/offering in place.
“Show me the incentive and I will show you the outcome”
-Charlie Munger


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When a problem is identified, hire another person or add another role. Rather than resource/integrate a system and consistently train Team Members.
“We don’t rise to the level of our expectations, we fall to the level of our training and systems”
-James Clear

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What Members Will Notice and Experience in the First Season

From the first weeks, Members should see and feel the difference, not just read about it in a Board report.

- **An enhanced and engage, published event calendar:** golf, racquets, fitness, dining, and social events planned in advance, with something for every Member every month, from couples' events and interclub matches to wine dinners, cooking classes, and family nights.
- **More variety in dining:** seasonal menus, a specialty cocktail program, chef's specials, and themed dining nights, so there's always a reason to come back.
- **A consistent experience on every visit:** every server briefed before each shift and able to describe the specials firsthand, and the same quality on a quiet Tuesday as at a Saturday event.
- **Managers at the table:** department leaders who know Members by name, check in during service, and follow up personally if anything falls short.
- **Course conditions Members can count on:** a written agronomic plan built around UPCC's season and traffic, with conditioning updates shared with Members.
- **More golf, more ways to play:** new formats like match play, two-person events, interclub competitions, and organized golf travel, plus Guest of Member specials during off-peak times.
- **Easier booking and better communication:** a refreshed website, simpler event registration, and regular Member updates on what's happening and what's coming.
- **A club that grows its membership:** a reenergized membership story and sales effort that brings new Members into the community, without crowding current ones.
- **A real voice:** regular Member surveys, with results shared and acted on, so Members see their feedback lead to change.

The goal is simple: Members use the club more because every visit is worth it.

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Transitioning - Your First 90 Days

Hampton Golf recommends a structured transition that begins as soon as the contract is awarded and runs through the management start date. The goal is to protect UPCC's peak season from any disruption during the transition. Stabilizing and supporting leadership is our first priority, not a later step.

- **Award to 60 Days Out (Stabilize Leadership):** Hold a joint transition kickoff with the Board. HG provides interim oversight (if needed). We launch the General Manager search, with the Board involved in interviews to the degree it chooses. We meet one-on-one with every full-time team member about retention. We also begin setting up benefits and payroll through Paychex and start the SWOT and departmental assessments of golf operations, agronomy, F&B, and membership.

- **60 to 30 Days Out (Position for the Season):** Marketing and pricing work begins, so new positioning is ready for the season rather than built partway through it. This covers the website and digital assets, a review of membership offerings and daily-fee rates, and the predictive pricing setup. We also reset the GolfNow relationship and export all inquiry and member lists into the new CRM, so no lead is lost.

- **30 Days to Go-Live (Systems and People Ready):** Point-of-sale, tee sheet, and operational systems activation are tested live. Golf shop inventory and vendor accounts are transferred, and national buying programs are activated. Every team member is trained on Hampton Golf service standards and shift checklists. Insurance programs are finalized and weekly progress reports are shared with the Board.

- **Start Date/Go-Live:** Hampton Golf assumes full operational responsibility for University Park Country Club. Course access, member services, and food and beverage continue without interruption.

- **Days 1 to 90 (Deliver Early Wins):** We present a baseline member and staff survey to the Board, followed by the first in-person monthly financial and operational review. A refreshed event calendar launches across golf, fitness, racquets, and social programming. We roll out compensation and incentive plans for department leaders tied to revenue, cost of goods, and labor targets.

Every transition is managed on a shared digital task-tracking platform with a checklist of more than 200 items. The Board, on-site staff, and Hampton Golf's support team can all see progress in real time and give input at every step.

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Transitions built for **Immediate success.**

97%
Staff Retention Rate

98%
Owner Satisfaction Score on Transitions

- Hampton Golf believes the transition period is the most critical phase of any management relationship. How a transition is handled establishes trust, credibility, and momentum, and directly influences the partnership's long-term success.
- This is not a handoff or onboarding exercise, but a deliberate and structured process designed to provide stability, clarity, and confidence for the Community, Members, and staff from day one.

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Thoughtful planning,

Perfectly Executed.



Objectives:

1. Communicate effectively
2. Be present on-site
3. Create clear deadlines & milestones
4. Retain all staff members
   a. Hire new staff, if needed
5. Evaluate optimal technology
6. Complete transition checklist
7. Survey & report findings to Board
8. Prepare budgets and financials

Approach:

- 20+ HG Leaders involved
- Checklist with over 200+ items
- Specific deadlines
- Direct communication & follow-up
- Staff on-site continuously during transition

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ACCOUNTING, FINANCE, INSURANCE

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Financial guidance, transparency, and accountability are the foundation of our service offerings.

Controls - internal controls safeguard all property assets. We will provide all segments of your facility with a toolbox of controls and best practices tailored to the UPCC operation, to drive decisions and monitor business health. Management of inventory is one area where Hampton Golf's systematized inventory training and procedures enhance controls, the accuracy of inventory reports, and gross margin management.

Reporting & Analysis- to gauge progress against financial forecasts, budgets, and goals, our team provides you with detailed monthly profit and loss statements, summary financial reports, and other key financial metrics. We deliver in-month snapshot reports to help property leaders manage the business more effectively, tracking success across Key Performance Indicators (KPIs) and through benchmarking using similar property types.

Payroll Compliance - we assign a dedicated payroll administrator to each partner who teams with property-level contacts to ensure payroll practices are aligned with local and state regulations for minimum wage, time and attendance, and other related activities. Our team can quickly respond to a broad range of new regulations and help you capitalize on emerging opportunities as they develop.

Budgeting & Forecasting - our executive team supports the budgeting and forecasting process through best-in-class processes, data, and capabilities. And, given our diverse portfolio and extensive industry experience, we bring to bear a wealth of insights across all property types nationwide and can adapt to unique operating models.

Insurance & Risk Management - backed by industry-leading broker and carrier partners specializing in golf and hospitality risk, we deliver insurance programs and policies that are tailored to your business. These programs are supported by dedicated service and broker teams with safety consultants to help mitigate risk and claims advocates to manage claims

Finance & Accounting Systems – Financial accounting systems used for general ledger accounting and month-end financial statement reporting will be evaluated and positioned.

ANNUAL CONSOLIDATED FORECAST	Budget 2027 YEAR 1	Projected 2028 YEAR 2	Projected 2029 YEAR 3	Projected 2030 YEAR 4	Projected 2031 YEAR 5	Projected 2032 YEAR 6	Projected 2033 YEAR 7	Projected 2034 YEAR 8
REVENUES								
MEMBERSHIP DUES	6,892,279	7,167,970	7,454,689	7,752,877	8,062,992	8,385,512	8,720,932	9,069,769
OTHER GOLF FEES AND DUES	186,146	193,591	201,335	209,388	217,764	226,474	235,533	244,955
GOLF GREEN & CART FEES	3,678,144	3,825,270	3,978,281	4,137,412	4,302,909	4,475,025	4,654,026	4,840,187
GOLF RETAIL	572,287	595,178	618,985	643,745	669,495	696,274	724,125	753,090
Fitness/Tennis	72,079	74,962	77,961	81,079	84,323	87,695	91,203	94,851
FOOD AND BEVERAGE	3,442,479	3,580,178	3,723,386	3,872,321	4,027,214	4,188,302	4,355,834	4,530,068
ADMINISTRATION-OTHER	81,552	84,814	88,206	91,735	95,404	99,220	103,189	107,317
TOTAL REVENUE	**14,924,966**	**15,521,965**	**16,142,843**	**16,788,557**	**17,460,100**	**18,158,503**	**18,884,844**	**19,640,237**
COST OF GOODS SOLD								
GOLF SHOP MERCHANDISE	412,091	428,575	445,718	463,546	482,088	501,372	521,427	542,284
FOOD AND BEVERAGE	1,445,453	1,432,071	1,489,354	1,548,928	1,610,886	1,675,321	1,742,334	1,812,027
TOTAL COGS	**1,857,545**	**1,860,646**	**1,935,072**	**2,012,475**	**2,092,974**	**2,176,693**	**2,263,760**	**2,354,311**
GROSS PROFIT	**13,067,422**	**13,661,319**	**14,207,772**	**14,776,082**	**15,367,126**	**15,981,811**	**16,621,083**	**17,285,926**
LABOR								
GOLF OPERATION	883,760	919,111	955,875	994,110	1,033,875	1,075,230	1,118,239	1,162,968
F&B	2,520,758	2,488,985	2,456,099	2,542,063	2,631,035	2,723,121	2,818,430	2,917,075
GOLF MAINTENANCE	2,040,143	2,121,749	2,206,619	2,294,884	2,386,679	2,482,146	2,581,432	2,684,689
TENNIS	405,203	421,411	438,267	455,798	474,030	492,991	512,711	533,219
ADMINISTRATION	1,554,774	1,616,965	1,681,644	1,748,909	1,818,866	1,891,620	1,967,285	2,045,977
TOTAL LABOR	**7,404,639**	**7,568,220**	**7,738,504**	**8,035,764**	**8,344,484**	**8,665,108**	**8,998,097**	**9,343,929**
OPERATING EXPENSES								
GOLF OPERATION	494,164	506,518	519,181	532,161	545,465	559,101	573,079	587,406
F&B	732,296	750,603	769,368	788,602	808,318	828,525	849,239	870,470
GOLF MAINTENANCE	1,789,315	1,834,048	1,879,899	1,926,897	1,975,069	2,024,446	2,075,057	2,126,933
TENNIS	181,837	186,383	191,042	195,818	200,714	205,732	210,875	216,147
ADMINISTRATION	1,241,064	1,272,091	1,303,893	1,336,490	1,369,903	1,404,150	1,439,254	1,475,235
TOTAL OPERATING EXPENSES	**4,438,676**	**4,549,643**	**4,663,384**	**4,779,968**	**4,899,468**	**5,021,954**	**5,147,503**	**5,276,191**
OPERATING P/L	**1,224,107**	**1,543,456**	**1,805,884**	**1,960,350**	**2,123,174**	**2,294,748**	**2,475,483**	**2,665,807**
OTHER INCOME/EXPENSES								
INITIATION FEES/OTHER INCOME	1,406,027	1,462,268	1,520,759	1,581,589	1,644,853	1,710,647	1,779,073	1,850,236
OTHER EXPENSES (Excludes Dep)	353,578	364,185	375,111	386,364	397,955	409,894	422,191	434,856
Net P/L	**2,276,556**	**2,641,538**	**2,951,531**	**3,155,575**	**3,370,072**	**3,595,501**	**3,832,365**	**4,081,186**
Cummulative Profit/Loss	**2,276,556**	**4,918,095**	**7,869,626**	**11,025,201**	**14,395,273**	**17,990,774**	**21,823,139**	**25,904,325**

Same dues. A stronger club.
A $569,591 improvement in year one.

ADOPTED EBITDA	REVISED EBITDA	NET IMPROVEMENT
$654,516	→ $1,224,107	+$569,591

+87% · no dues increase

THE PARTNERSHIP PAYS FOR ITSELF

3.4×

After paying Hampton Golf's management fee, UPCC keeps $3.44 in improvement for every $1 of fee.

Grow Revenue	+$429,803	Run Leaner	+$417,131	Invest in Results	($277,343)
Golf daily fee GolfNow reset + predictive pricing	+$180,000	Communications, IT & Accounting Absorbed by Hampton Golf's support team	+$308,905	Hampton Golf management fee Senior leadership, systems & support	($165,600)
Food & beverage Programming that drives repeat visits	+$249,803	F&B seasonal scheduling Labor matched to demand	+$63,280	F&B cost of goods Driven by higher sales	($109,302)

Intentionally modest financial performance

Dues, membership count, racquets, and course maintenance are held flat, so agronomy isn't cut to make the numbers work. Operational change leads; the financials follow. Better programming, service, and systems show up first in the member experience, then in the P&L.

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GOLF OPERATIONS

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Provide a comprehensive approach that enhances the value proposition for the Club, Members, and Guests.

Golf Operations can re-focus and re-energize Member and Guest activity

- Install exciting, non-traditional event programming
- Hire and develop the best talent to promote the highest level of customer service
- Increase Golfer Usage – A primary goal is for Members and Guests to play more golf. More frequent play is a rising tide that positively impacts all revenue streams and, ultimately, lifts profitability
- Increase Team resources, identify Team efficiencies, schedule Team appropriately
- Growing Golf Revenue
  - Emphasizing and enhancing programming
  - Installation of Predictive Pricing System for daily fee play
  - Renegotiate GolfNow participation and strategy
- Staffing matrix based on utilization and rounds data
- Management systems installation, training, and adoption assistance

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Operational Improvements and Activations

- Negotiate GolfNow agreement, correct imbalance (further description noted in presentation)
- Installation of predictive pricing system to price based on real data and not assumption
- Install Guest of Member specials for off-peak days/periods
- Implement digital shift checklists for inside and outside operations
- Install/activate a CRM and marketing automation system for outing sales/marketing
- Implement a weekly department meeting with a working agenda and follow-up actions on a digital task-tracking tool
- Head Golf Professional comp structure to add tournament sales commission based on new vs. repeat, bonus for labor % target, COGs target, and gross/net rev
- Provide HGP with departmental financials access, minimum review month prior
- Activate cross-departmental programming and vendor participation
  - Golf programming improves with further club-organized events (i.e. match play, two-person match play, interclub events, organized travel, and more)
- Digital Team scheduling solution integrated with an agent to pull historic rounds data
- POS sharpening and calibration of current modules

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GolfNow Relationship Management & Strategic Realignment

Many semi-private clubs lean on barter tee-time arrangements with GolfNow, trading discounted inventory for marketing exposure. Hampton Golf does not recommend or currently participate in barter arrangements. Our experience is that they systematically damage revenue and brand positioning rather than protect them. Goal – retain and nurture customer data, move away from GolfNow in 2 years or less

Why barter arrangements hurt UPCC: Barter tee times are typically offered 40–60% below standard rates, and third-party booking algorithms prioritize that discounted inventory, forcing the course to compete against its own pricing, anchoring customer expectations to artificially low rates, and steadily eroding revenue per round and brand positioning over time.

Hampton Golf's alternative — a fee-for-service model: Replacing barter with a commission-based, fee-for-service relationship lets UPCC participate in GolfNow's marketing reach while maintaining consistent pricing across all channels, eliminating internal rate competition and protecting premium tee times for direct and resident bookings.

Rate parity: Every booking channel — direct website, phone, and any third-party listing — will reflect identical pricing for comparable tee times, eliminating rate-shopping behavior and protecting the value perception

Reclaiming customer data ownership: Capture complete golfer profiles and preferences that barter arrangements otherwise fail to capture. Rebuilding UPCC's own first-party databases supports direct email and retargeting marketing, better demand forecasting, and reduced long-term dependency on GolfNow and other third parties.

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GOLF MAINTENANCE

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The National Golf Foundation's annual survey of golfers shows course conditions are the No. 1 reason one course is played over another. It's an expectation that, when not met, leads to a softening of Member and Daily Fee participation and Member satisfaction. It confirms the fact that product excellence equates to a favorable price-value relationship.

Mandate

Hampton Golf's Agronomy Team is highly educated, skilled, and determined to deliver an outstanding playing experience to each guest every day.

Our guest-centric approach is more than simply growing grass. The focus is also on healthy turf, eco-sustainability, and keen attention to detail across the total acreage. This is in concert with a reasonable budget required to impress Members and Guests time and time again and earn positive word of mouth. Commitments to excellence by the Golf Course Superintendent and others on the Maintenance Team lead to staffing efficiencies and a high-quality, enviable end product.

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Strategy & Plan

- A written agronomic plan will establish short-term and long-term goals
- The conditioning blueprint accounts for seasonality yet is flexible to meet nuances in weather conditions, golfer traffic, potential capital expenditures, and other variables.
- Adhere to an approved budget consistent with standards and metrics within the agronomic plans.

Advanced Scoreboards (Tasktracker) labor analysis helps our superintendents create efficient, effective budgets. Hampton Golf benchmarks each agronomic plan against similar facilities within the portfolio to identify opportunities. In addition to labor analysis, the agronomic plan includes a chemical and fertilization schedule with integrated budget calculators based on application frequency, product cost, and treated acreage.

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MARKETING – SALES, ADVERTISING & VALUE

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PERCEIVED VALUE IN RELATION TO PERCEIVED PRICE

- When Price (P) remains consistent
- An increase in Perceived Value (PV) perceptually decreases Perceived Price (PP), thus increasing Usage (U).
- Conversely, a decrease in PV perceptually increases PP and decreases U.

Hence, Hampton Golf's unwavering focus on increasing PV!

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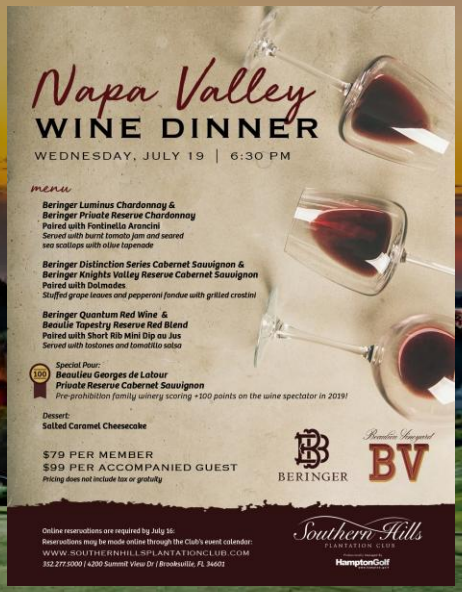
1. **Study, focus, and improve the Member and Guest experience**
   - Detailed study of first touch through the experience survey
   - Strategic and more impactful use of Club amenities and programming

2. **Improve image, packaging, and marketing impacts**
   - Reimaging of UPCC (branding, website, social media, graphic designs, event flyers, etc.)
     - Build on UPCC's heritage with a modern experience (focus on value and experience enhancement)
   - Redesign website to increase traffic, improve the user experience, and advance SEO/AEO

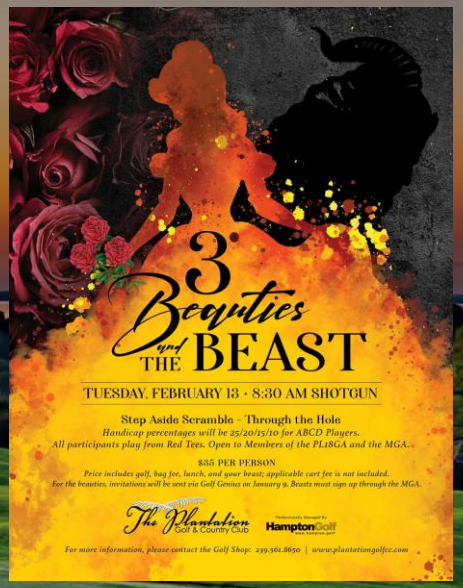
3. **Repositioning Membership Offerings, Market Engagement, and Sales Actions**
   - Embrace and engage current Members and Guests, increasing value with every touch

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MEMBER EXPERIENCES - PROGRAMMING









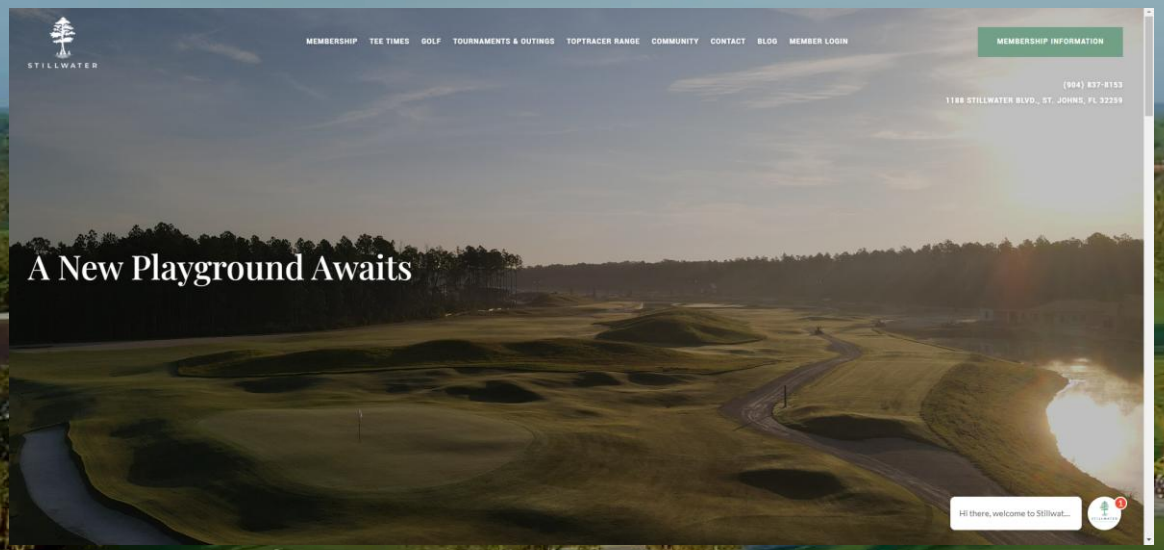




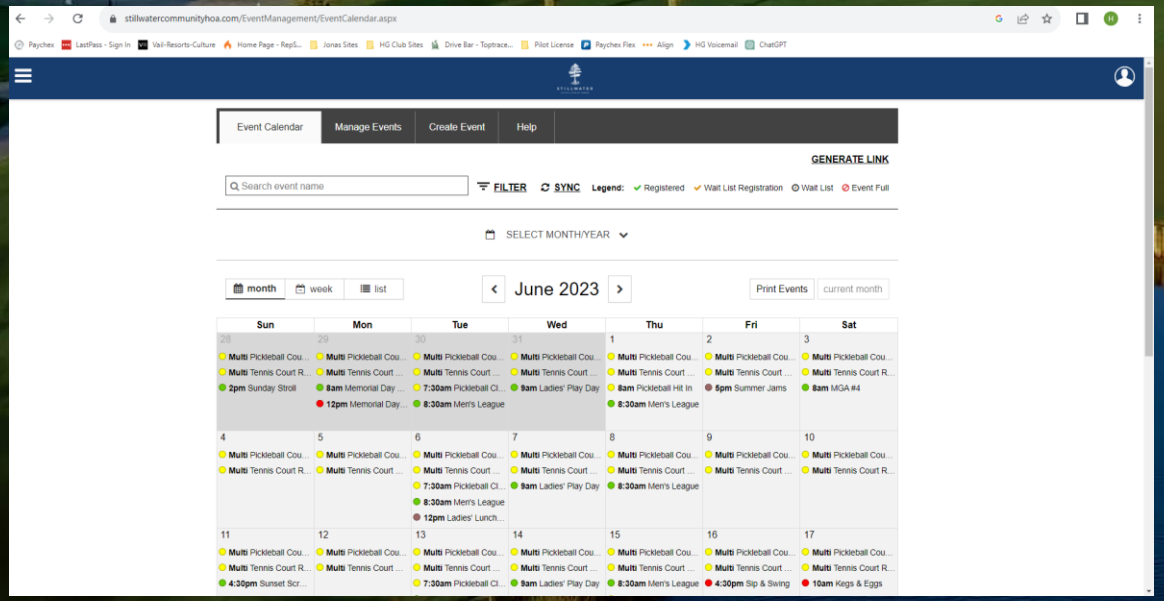
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IMPROVE DIGITAL ASSETS

PUBLIC FACING



MEMBER FACING



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REPOSITIONING MARKET ENGAGEMENT

Overhaul of all sales collateral, bringing to life the spirit of the Club



Reimagine campaigns, sharing the exclusively relaxed elegance of the Club



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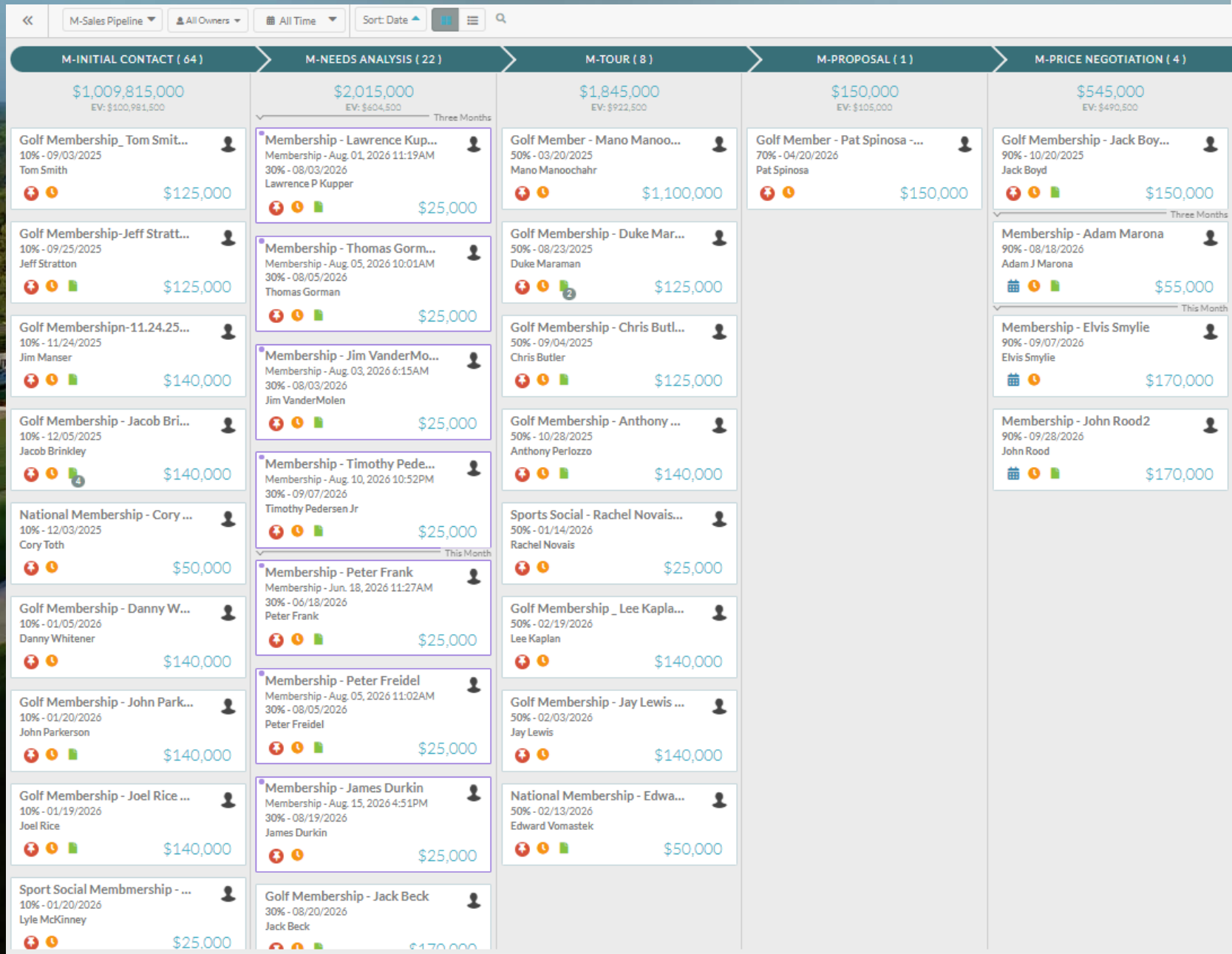
A SALES-FOCUSED ORGANIZATION

Sales Training is a constant

- Best practices, sales forecasting metrics, data collection

Pipeline Management

Sales Automation



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REAL DATA DECISION MAKING

- Decisions on where to invest media dollars are data-driven
- Remove “I Think” or “I Feel” in decision-making

Campaign Insights

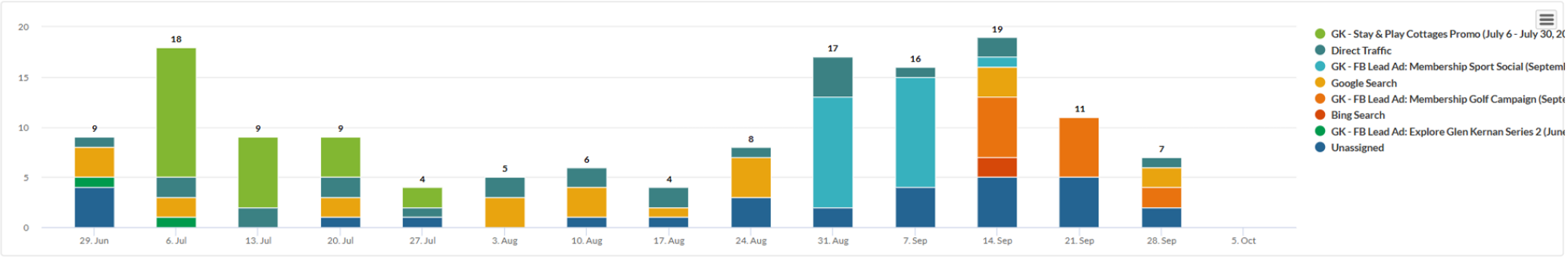
Build your customized report | Leads & Contacts | Types | Jun 30, 2026 - Sep 30, 2026 | Apply

142 Unique Leads | **63** Working Opps | **23** Total Sales | **$869,500** Revenue + EV of Pipeline

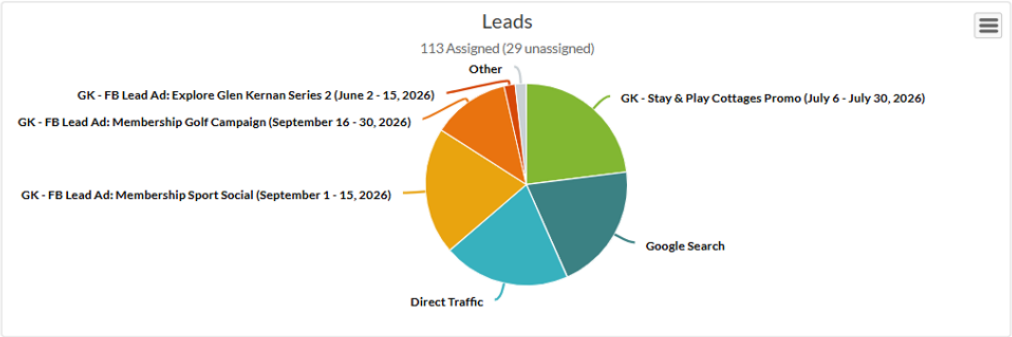
SHOWING 17 CAMPAIGNS

Leads & Contacts

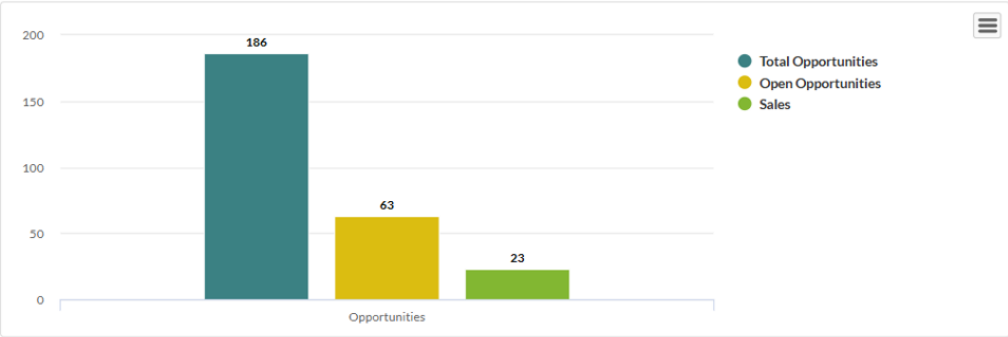
Group by Campaign | Day | Week | Month



Campaign Breakdown



Sales Breakdown



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FOOD & BEVERAGE OPERATIONS



Hampton Golf operates financially disciplined, best-in-class food & beverage channels spanning fine dining to poolside services.

The approach – a mix of standard and tailored.

Leadership collaborates to develop and execute an annual written plan for the food & beverage operation. Components include:

- Buying plan
- Marketing and sales programs
- Operations policies and procedures manual
- Staffing/labor analysis formula
- Guest services guidelines
- Safe food-and-beverage handling techniques
- Kitchen procedures
- Cooking and presentation training
- Alcohol service training
- Short- and long-term capital planning
- Unceasing Team Member training and workshops

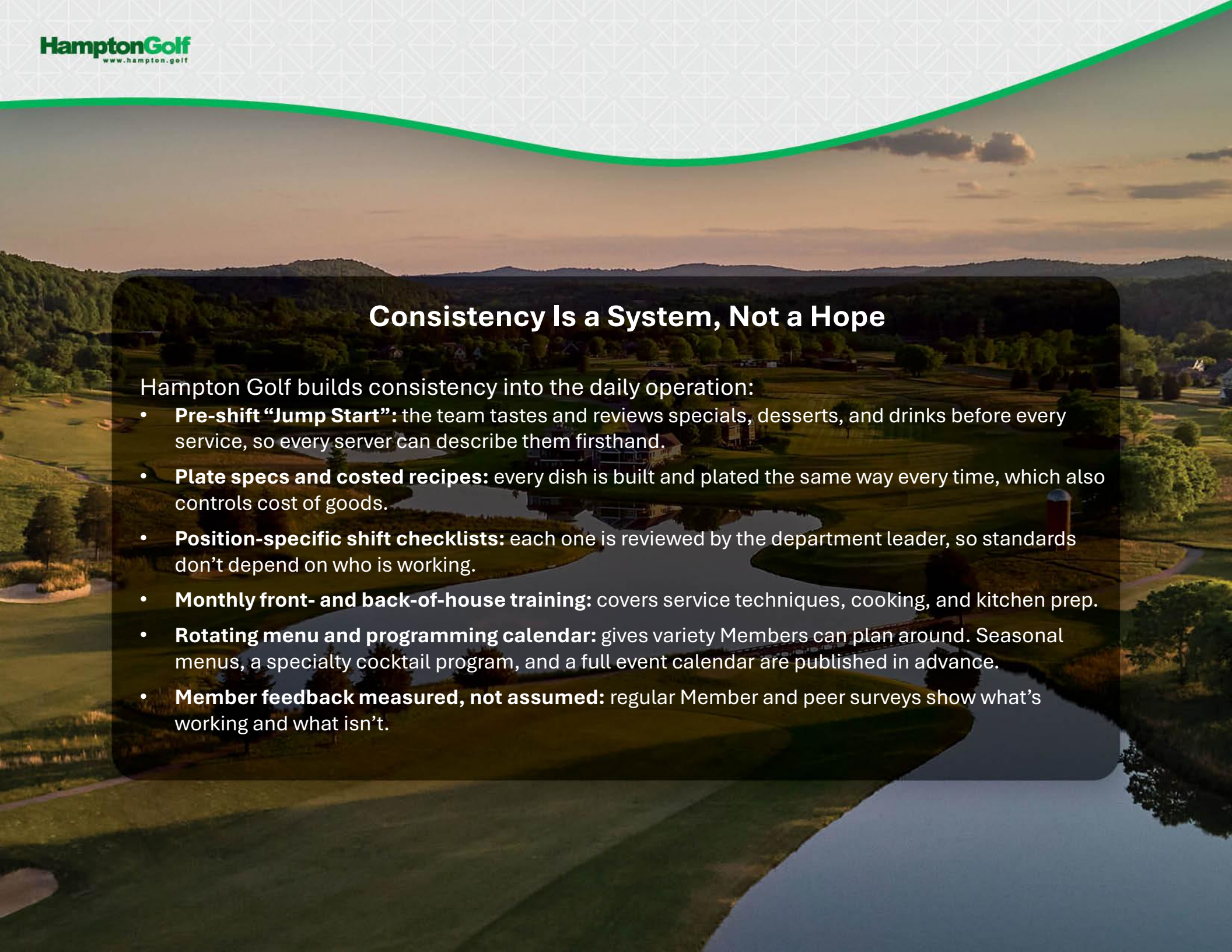
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You Are Only as Good as the Last Visit

What matters most to UPCC's Members and Guests: an exceptional product with real variety in the experience, the menu, and the programming.

- **F&B is the most management-intensive part of any club.** It is the department Members experience most often and judge most personally.
- **Every visit decides the next one.** A great meal earns a return visit, and a missed one puts it at risk.
- **F&B lives and dies on repeat business.** Members don't come back for the menu. They come back for how they felt the last time.
- **Consistency, consistency, consistency.** The same quality, service, and welcome on a Tuesday lunch as at the Saturday gala.
- **Programming is the multiplier.** Wine dinners, chef's tables, themed nights, and family events give Members a reason to come more often. That raises perceived value and usage across the whole club.

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Consistency Is a System, Not a Hope

Hampton Golf builds consistency into the daily operation:

- **Pre-shift "Jump Start":** the team tastes and reviews specials, desserts, and drinks before every service, so every server can describe them firsthand.
- **Plate specs and costed recipes:** every dish is built and plated the same way every time, which also controls cost of goods.
- **Position-specific shift checklists:** each one is reviewed by the department leader, so standards don't depend on who is working.
- **Monthly front- and back-of-house training:** covers service techniques, cooking, and kitchen prep.
- **Rotating menu and programming calendar:** gives variety Members can plan around. Seasonal menus, a specialty cocktail program, and a full event calendar are published in advance.
- **Member feedback measured, not assumed:** regular Member and peer surveys show what's working and what isn't.

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When Things Go Wrong: Service Recovery

Every club/restaurant has an off night. What Patrons remember is how the property responds. A well-handled recovery can build more loyalty than a flawless visit.

Our recovery standard: Hear → Own → Fix → Follow Up

1. **Hear:** listen fully, without interrupting or explaining. Thank the Member for telling us.
2. **Own:** apologize sincerely and take responsibility. Never blame the kitchen, a co-worker, or "the system."
3. **Fix:** solve it at the table, right away. Every team member is authorized to resolve issues up to $50 without waiting for a manager.
4. **Follow-up:** a manager visits the table before the Member leaves and follows up personally within 24 hours.

What happens behind the scenes:

- Every recovery is logged in post-shift notes.
- Patterns are reviewed in the weekly department meeting.
- Recurring issues are fixed at the root, so the same problem doesn't recur

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Operational Improvements and Activations

- Review Club's POS F&B module for operational efficiency and reporting
- Share monthly/real-time financials with department leadership, showing COGS, labor, and revenue
- Install online/mobile staff scheduling solution (7Shifts is recommended)
- Cost out food and beverage menus for COGS for each menu item
- Straightaway improve/update departmental programming
  - Including racquets, golf, and fitness programming, a must
- Adopt a preferred vendor list for all purchases, utilize a national buying program
- Install shift checklists for each position, reviewed by department leader
- Schedule monthly FOH and BOH in-person training on service techniques, cooking techniques, kitchen prep, and more
- Activate a pre-shift "Jump Start" to review/taste specials, desserts, and drinks
- Install inventory control practices for all outlets
- Develop a monthly specialty cocktail list and market it properly
- F&B Director compensation plan reviewed and updated to be based on gross/net rev, COGS, and labor targets
- Utilize CRM and marketing automation system for event sales pipeline management
- Activate and update accounts on weddingwire.com, theknot.com, Zola, Pinterest
- Develop and introduce targeted social media campaigns
- Develop commission schedule for Sales Pro based on monthly budget and percentage of budget achieved
- Recreate all collateral and customer-facing materials (menus, presentations, agreements, invoice)

A lot more, but this gets us started

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GENERAL & ADMINISTRATION

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Operational Improvements and Activations (sales, accounting, HR and other)

- Install a CRM for sales pipeline management and tracking
  - Export all inquiry lists from the previous website/forms into the new CRM
- Update/improve membership and event sales collateral (pictures, copy, storytelling)
- Add a Member onboarding process and checklist to Sales Pros actions for sales
- Activate a weekly department head meeting with a working agenda and online project tracking tool
- Review current application and membership docs/rules & regs for updates needed
- Heatmap current membership by zip code, then age, to understand where to target
- Activate social media marketing with incentive and branding campaigns, purchasing actionable demographic, geographic, and psychographic qualifiers
- Activate digital service training for all Team Members, with testing and reporting
- Rebuild sales commission schedule based on monthly budget targets and commission schedule (<90%, 91%-105%, >105%)
- Train all department heads on Outlook management, folder development, calendar use, and task building
- Install a digital invoicing solution to improve efficiency and tracking
- Install a digital vendor registration solution
- Move to centralized accounting support, reducing labor costs and improving financial accuracy
- Develop Long Range Plan (LRP) for next 5 years

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Staffing, Hiring, Training & Development

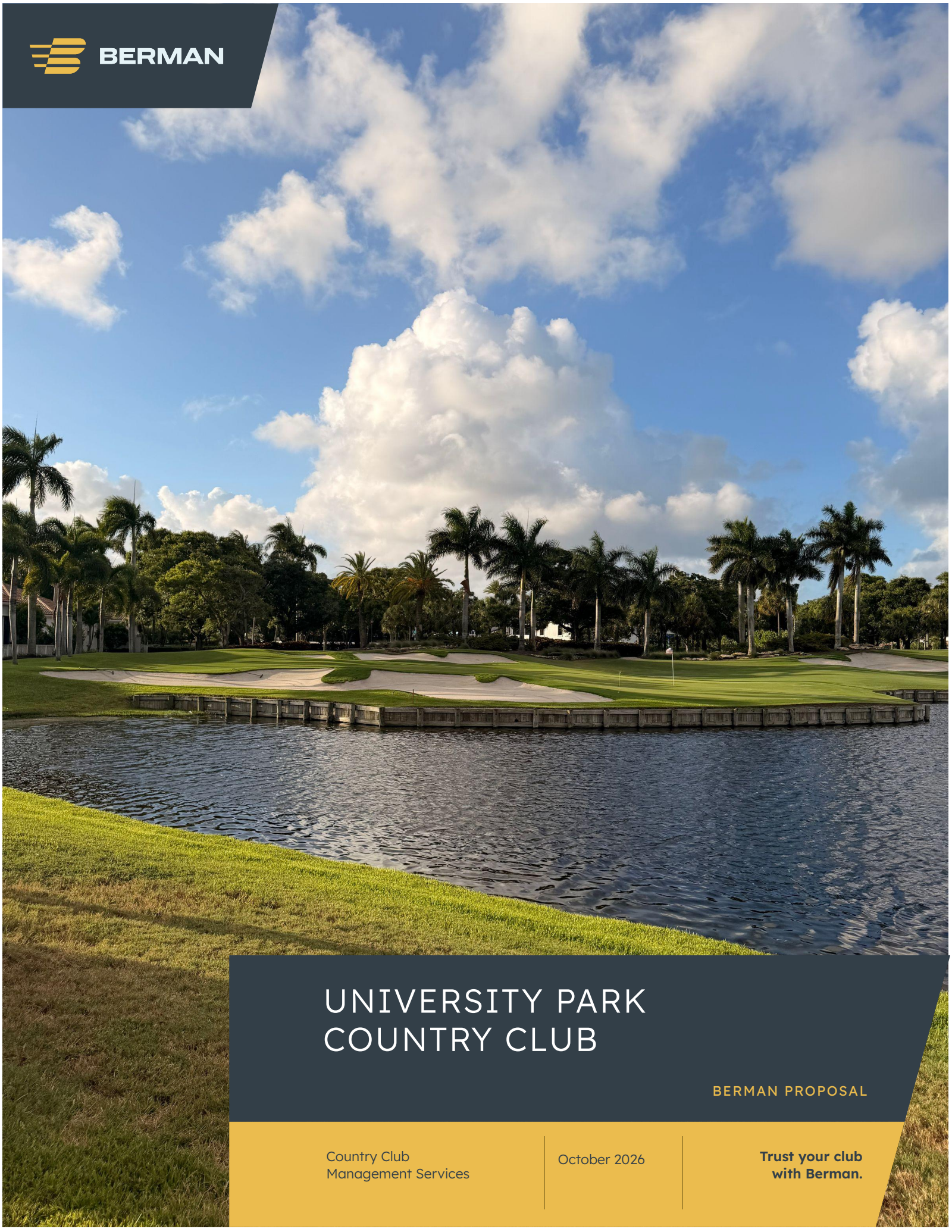
Hampton Golf will manage recruiting for an on-site General Manager with full accountability for daily operations and staffing, reporting through Hampton Golf's operations leadership to our COO. The Board will determine the level of involvement regarding recruiting/interviewing for the General Manager position.

UPCC’s Team Members will be trained and developed through Hampton Golf's in-house programs, not generic onboarding, including:

- Tidbits — short, recurring micro-learning modules that keep front-line staff sharp on service standards without pulling them off the floor for long training sessions.
- LeaderUP — a structured leadership-development pathway for department heads and future general managers, so UPCC’s leadership bench grows from within.
- Eagle Mindset Executive Coaching — one-on-one coaching for senior on-site leadership, reinforcing accountability and decision-making speed.
- A Kaizen-based continuous-improvement philosophy, where incremental operational improvements are surfaced by on-site staff who do the work every day, not handed down exclusively from company support.
- Advanced Scoreboards — Hampton Golf's task-tracking system for assigning, tracking, and closing out operational action items, so nothing falls through the cracks between shifts or departments.
- Payroll processing through Paychex, Hampton Golf's payroll partner across its portfolio, feeds directly into the financial reporting package.


No Other Partner Will Be As Close
to University Park Country Club
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BERMAN



UNIVERSITY PARK COUNTRY CLUB

BERMAN PROPOSAL

Country Club
Management Services

October 2026

Trust your club with Berman.

BERMAN

OCTOBER 2026

University Park Country Club

Joey Rassett, General Manager
7671 The Park Blvd
University Park, FL 34201

Dear Mr. Rassett,

On behalf of the entire Berman team, I am pleased to submit this proposal to provide Club Management Services for University Park Country Club, beginning initially with outsourced human resources, payroll, and serving as a third-party employment partner for your club staff, with flexible options available to you anytime in the future for the entire club management scope or an increased scope.

My company started 20 years ago with the goal of providing outstanding services to clients throughout Florida. We knew there was a significant need for a partner that focuses on the details, excels in customer service and quality control, and brings an employee-first mentality: the same standards your members expect every time they pull through the front gate.

I believe Berman is your best option for your outsourced HR, payroll, and any other club management needs because our team has the wide range of expertise needed to keep University Park Country Club a point of pride for members, their guests, and the surrounding community. From the gatehouse to the eighteenth green, we understand that every detail shapes the member experience. Most importantly, we place the highest value on the employees of the club. They are the ones who ultimately bring the member experience to life on site, and we invest heavily in supporting them.

Throughout this proposal, we hope it becomes clear that Berman is the right partner to uphold the member experience, appearance, functionality, and overall quality of University Park Country Club to the highest standards, working quietly behind the scenes so your members can simply enjoy their club.

I look forward to working with you, your Board, and your team for many years to come.

Sincerely,

Marty Berman

Marty Berman
Founder & President

BERMAN

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BERMAN



01

WHY BERMAN

Trust your club with Berman.



Berman is Your Trusted Partner

Who We Are

Berman is a club, property, and facility services outsourcing provider implementing innovative, turnkey solutions for private clubs and the communities around them. We craft solutions for each client based on their specific needs, which we anticipate and accomplish swiftly.

We pride ourselves on being a single point of contact for every operational need at your club. Our work is synonymous with quality, discretion, and integrity.

What We Do

We can manage a single scope or the entire scope of work. Our contributions to your success will be evident in the member experience, yet we are always behind the scenes. Our offerings can be as simple as providing human resources and payroll services, or we can deliver a larger scope that includes a full club management operation, including the clubhouse, golf course maintenance and agronomics, facilities, food and beverage, lifestyle/member amenities, and common club grounds. Your General Manager and Board can rest easy knowing every corner of the club is always taken care of with excellence.

Our Club Services

- ✓ **Human Resources & Payroll**
- ✓ **Club & Clubhouse Management**
- ✓ **Golf Course & Grounds Support**
- ✓ **Clubhouse Housekeeping**
- ✓ **Food & Beverage Management**
- ✓ **Facility & Amenity Maintenance**
- ✓ **Gated Access & Club Security**
- ✓ **Event & Tournament Support**
- ✓ **Renovations & General Construction**

BERMAN

What We Believe

QUALITY

We deliver work of exceptional quality by investing in great people, continuous improvement, and uncompromising standards worthy of a private club.

PARTNERSHIP

We build enduring relationships with management, the Board, and members, rooted in trust, reliability, and a shared commitment to the club's long-term success.

COMMITMENT

We bring focus, discipline, and effort to every engagement, knowing that flawless execution is what members notice, and remember.

FLEXIBILITY

We respond quickly, work around tee times, tournaments, and private events, and develop solutions tailored to each club's culture.

INTEGRITY

We operate with honesty, discretion, and transparency, building trust through ethical practices and consistently strong performance.

OUR MISSION

To deliver tailored club management and administrative support solutions, scaled to each club's needs and driven by an uncompromising commitment to the member experience.

Our Promise

At Berman, we believe that strong partnerships are built on more than delivering results. They're built on trust, accountability, and a shared commitment to doing the right thing for the club and its members. These guiding principles shape how we work with every client, every day.



To Be Transparent

We hold ourselves accountable and expect the same of every partner on property. When challenges arise, whether it's a failed pump on the pool deck or a storm-damaged cart path, we address them directly, keep management informed, and work together toward the best possible outcome.



To Be Responsive

We have a process for quick response that we take very seriously, supported by our management and executive team. A member issue reported in the morning should be resolved before the afternoon shotgun. We always have your back in a pinch.



To Be Honest

We communicate with honesty and transparency. We know your club has options in its partners and providers, and we go the extra mile to continuously earn the trust of your management, your Board, and your members.

We offer services that provide dependable, professional, and cost-effective solutions for private clubs, resorts, and residential communities. Our team is highly skilled in club operations, human resources and back office support, facility management, turf care and agronomics, on-demand repairs, maintenance staffing, and every ancillary service that keeps a club running as smoothly as a well-paced round.

We are highly technical in nature, using our practical understanding of management and administrative systems coupled with our diverse skill set to serve our clients with swift and diligent work. We embrace problems and are eager to solve them whenever they come up, creating unique solutions for each club. We care about quality for quality's sake, knowing that it's the heart of what we do.

Our History

Created during the recession, Berman has been serving property owners since 2006. Headquartered in Central Florida, we've helped clubs, resorts, communities, and commercial owners locally and across the state by providing management and support services that protect the quality of their investment and the experience of the people who use it.

BERMAN GROUP BY THE NUMBERS



20M SQ FT

Commercial & Club Space



20 Years

Serving Florida Clubs, Properties & Communities



Hundreds

of Golf Holes Managed



Top 20

Multiple Top 20 Platinum Clubs in America Serviced by Berman

Caring for Your Members

Berman understands that a private club is a home away from home for its members. We have always been at the forefront of customer service within the property and facility industry, and we bring that same hospitality mindset to every club we serve.



Gold-Standard Member Service

Berman has adopted the customer service initiatives used by the world's largest theme park company, Walt Disney World, as well as the legendary Ritz-Carlton Leadership Center, for our frontline staff processes.

Berman now has multiple managers who have completed these customer service training courses. This training is mandated for all senior managers and is provided annually, so the most current techniques reach every employee who serves your members.

These trainings clearly teach that employees are expected to be polite, helpful, friendly, and deferential to member and guest needs. Member experience defines a club, and our employee training focuses on this measurable outcome in all that we perform.

Discreet, Club-Ready Operations

We work around the rhythm of the club. Noisy tasks are scheduled before the first tee time or after the dining room closes, crews stay clear of play on the course, and our staff are trained in club etiquette, including dress code, member privacy, and the quiet professionalism members expect.

Caring for Your Employees

Great clubs are built by great people. Berman is an employee-first company because we know a simple truth: happy employees create happy members. The team on site is the club's highest-value asset, and we invest in their experience as deliberately as we invest in your members'.



Employee First, Member Focused

Every member moment starts with an employee. The server who remembers a favorite table, the attendant who has the locker room ready before the first tee time, the technician who fixes it before anyone notices. Members feel the difference when the people serving them feel valued, supported, and proud of where they work.

Human Resources That Work for People

Our robust human resources process handles the details so club staff can focus on members: thoughtful recruitment and screening, a welcoming onboarding experience, clear policies, and a responsive HR team that is fair, accessible, and always in their corner.

Pay, Benefits & Peace of Mind

Accurate, on-time pay is a promise we take seriously. We administer payroll and benefits enrollment with care, so employees understand what they have, get answers quickly, and never have to worry about the basics.

Training That Builds Careers

We invest in growth, not just onboarding. Ongoing training, including our Disney and Ritz-Carlton inspired service programs, sharpens skills and builds confidence, while clear paths for advancement turn great hires into long-term team members.

Engagement You Can Feel

We listen, recognize, and act. Dedicated employee engagement measures, including regular check-ins, open feedback channels, and recognition programs, keep morale high and help us retain great people, so members see familiar, motivated faces season after season.

Happy employees create happy members.

Our people are the club's highest-value asset, and we treat them that way every day.



Quality Management

The Highest Standards

The Berman team is committed to ensuring every service we provide meets or exceeds the club's expectations and our internal quality standards. Our quality control plan provides the means to prevent, detect, correct, and report deficiencies before a member ever notices them.

In addition to routine monitoring of performance, our Corporate Support Team coordinates with on-site staff and club management to provide quality assurance oversight. This is true for our back office and support offerings all the way through our full-service offerings, including daily walk-throughs of the clubhouse, locker rooms, pool deck, and member-facing grounds.

This quality control plan covers all service functions that involve the receipt of work, planning, estimating, scheduling, material acquisition, work assignment, supervision and inspection, corrective action, and preventive action.

Commitment to Excellence

Berman is committed to providing members and their guests with excellent physical property services in addition to the highest levels of customer service. Beyond the training initiatives above, our employees complete a rigorous service training program so they consistently deliver "The Berman Experience."

Members are our scorecard. We align our inspections with the club's own standards and calendar, prepping the clubhouse ahead of member-guest events, holiday parties, and weddings, and we review member feedback with the General Manager every month, so issues are corrected quickly and trends are addressed before they become complaints.

Human Resources, Payroll and Back Office Tech

Technology-enabled infrastructure supporting employee administration, payroll operations, financial controls, and outsourced business services. These proven platforms give club leadership accuracy, accountability, and real-time visibility into the people side of the operation. **Berman is happy to use and integrate with any of the club's existing on-site software in lieu of any of the systems below, with the exception of payroll when Berman is processing payroll on our own platform.**



Paycor | Payroll & Employee Administration

Our payroll platform for payroll processing and records, W-2 administration, expense reimbursement submissions, and manager approval workflows, giving every employee accurate, structured pay and reimbursement administration.



Oracle NetSuite | Finance & Payroll Accounting

Our enterprise financial system for the general ledger, accounts payable, purchase orders, bank matching, reporting, and financial close. Berman procedures cover payroll imports, journal entries, and reconciliation, with internal templates that map payroll and job-costing data directly into NetSuite.



Microsoft SharePoint | Documentation & Workflow

A centralized, secure repository for operating procedures, HR documents, the employee handbook, finance training materials, and standardized workflows, so every process is documented and every team member works from the same playbook.



Workforce Timekeeping & Field Systems | Operations

Biometric timekeeping and Mobohubb workforce and post-management tools, including staff activity monitoring, deployed across our operating divisions where on-site accountability matters most.



Additional Back-Office Tools | Functional Support

MRI for property accounting and reporting, and bill.com for payables processing, deployed as each engagement requires.

HOW THIS SUPPORTS UNIVERSITY PARK COUNTRY CLUB

Berman combines established HR and payroll administration processes, documented financial controls, and standardized digital workflows into one coordinated back-office operating model. Club-specific system access, data segregation, integrations, regulatory responsibilities, and service levels are established during implementation.

Our Property and Facility Tech

Our use of technology to carry out policies and procedures enables us to deliver superior results at reduced cost. Our platforms span every part of our operations, giving club management real-time visibility into what's happening across the property.

NetSuite

NetSuite is a comprehensive facility services management platform that lets our teams efficiently manage work performed by our dedicated in-house staff and by subcontracted service partners. Berman uses this platform to manage day-to-day services at the club, including porter and housekeeping services, grounds care, on-demand repairs, preventive maintenance, event setup support, and security.

QR Quick Request System

360-Degree Quality Assurance

Quick Request is a complete quality assurance and quality control system developed by Berman specifically for facility services. We use it at several of our large accounts to monitor, track, and report on operations in real time.

Easy Access

Quick Request uses QR codes posted at each location, such as locker rooms, restrooms, the pool deck, fitness center, halfway house, and dining rooms, to manage inspections, job tickets, surveys, and staff tracking. Members and staff can use their phones to report a problem, request a service, or leave feedback, and the request reaches the right staff and management within five seconds.

Member Surveys

The QR system can gather immediate feedback from members and guests. Questions, ratings, and comments can be customized in your Quick Request mobile app so surveys stay simple and on-brand for the club.

Issue Reporting

Concerns reach our staff while members are still on property, so we can respond before they leave. Survey results are never published, and historical data is maintained and fully available to club management.

Business Continuity & Emergency Preparedness

The main threat to continuity in our industry is labor and resources during emergencies and disasters. To counter it, Berman's top priority is securing our full-time labor, part-time labor, and additional emergency labor through labor providers as well as existing employee resources, so the club is never left without support.



Emergency Staffing Plan

Over the past 20 years, Berman has tested its emergency response plan through several real emergencies. Our labor resources are our prime competitive advantage, and redundant communication systems keep our teams connected even during outages, so the club can reopen to members as quickly as safely possible.



Hurricane Preparedness

Florida clubs live with hurricane season. We stockpile storm resources in our Central Florida warehouse as well as a secondary out-of-state warehouse that wouldn't be affected by the same storm. Our teams have consistently had the clubs and properties we manage open before others. We deploy quickly and can mobilize additional outside resources faster than most.



Extensive Emergency Response

We build an emergency response plan for every property we serve, covering the clubhouse, course facilities, and member amenities. Planning and training are the keys to managing a business interruption well. In extreme circumstances, there may be times when reduced staffing levels are unavoidable due to Mother Nature.

BERMAN



02

CAPABILITIES

Trust your club with Berman.

BERMAN

BUSINESS SUPPORT SERVICES

Third-Party Employment Partner & Outsourced HR, Payroll and Back-Office Solutions

One accountable partner for the people, payroll and administrative functions that keep your club running. Berman can employ and manage your on-site team as your third-party employment partner, and combines operational management experience with structured processes, reporting and responsive support, so club leadership can focus on the member experience.



THIRD-PARTY EMPLOYMENT PARTNER

- ✓ Berman recruits, hires and onboards your club team
- ✓ Team members are Berman employees, paid on Berman's payroll
- ✓ Wages, payroll taxes, workers' comp and benefits administered by Berman, billed at cost
- ✓ Staff dedicated and assigned to the club contract
- ✓ Berman supervises, trains and manages the human resources on-site and off-site, and provides other training and supervisory scope on-site at the discretion of the club



HUMAN RESOURCES & WORKFORCE ADMIN

- ✓ Recruitment coordination, candidate screening and hiring support
- ✓ New-hire onboarding and employee records
- ✓ Personnel policies, handbook administration and documentation
- ✓ Employee relations and performance-process support
- ✓ Training coordination, offboarding and record retention



PAYROLL & EMPLOYEE SUPPORT

- ✓ Timekeeping and payroll data collection
- ✓ Payroll review, processing coordination and exception resolution
- ✓ New-hire, pay-change and separation workflows
- ✓ Payroll reporting, reconciliations and labor-cost allocation
- ✓ Benefits enrollment and leave administration coordination



ACCOUNTING & BACK-OFFICE OPS

- ✓ Accounts payable and vendor administration
- ✓ Accounts receivable and collections coordination
- ✓ General ledger and bank reconciliation support
- ✓ Budgeting, forecasting and financial reporting
- ✓ Contract, insurance and compliance-document tracking
- ✓ Purchasing, administrative workflows and management reporting

OUR DELIVERY APPROACH

DISCOVER & DESIGN → **TRANSITION & IMPLEMENT** → **OPERATE & REPORT** → **IMPROVE**

We establish a defined scope of services, approval authorities, secure information flows, reporting cadence and a designated client contact. Services can be tailored by function, workforce size and operating complexity.

THE VALUE TO YOUR ORGANIZATION



Reduced administrative burden



Consistent workflows and accountability



Better visibility into payroll and operating costs



Scalable support without building every function in-house

Service scope, regulatory responsibilities, system integrations and any specialist tax, legal or benefits services are established in the engagement agreement.

Club Facility Management

Create a Better Member Experience with Berman

It's not just about maintaining a facility. It's about creating a better experience for every member who walks through the clubhouse doors. Berman's professionally trained team works with you to manage the needs of the club, inside and out, so it's ready to impress every day.

Our team of professionals provides a full range of facility services to keep the clubhouse, cart barn, maintenance yard, and member amenities running smoothly. We work behind the scenes for clubs, resorts, residential communities, and hospitality venues to maintain a polished image.

What Our Services Can Do For Your Club

At Berman, we combine years of experience with the right professionals to take care of the club's day-to-day operations. We understand the challenges clubs face, from aging infrastructure to rising member expectations, and we work with your General Manager to develop practical solutions. Whether you need one of our services or all of them, we are here to help create value for the club.

Outsourcing facility management can save the club time and money while ensuring the property looks its best and operates efficiently, freeing your leadership to focus on membership, dining, and golf.

FULL-SERVICE CLUB FACILITY MANAGEMENT

- Pressure Washing
- Clubhouse Housekeeping
- Grounds & Landscaping
- 24/7 Repair Services
- Disaster Response
- Pool, Tennis & Fitness Care

Full-Service Club Management

Innovative Management Solutions for Your Club

Our management team at Berman is dedicated to improving how the club's physical assets are operated and cared for. We work with your General Manager, Board, and committees to develop management solutions that deliver seamless service and meet the club's long-term goals.

When you work with Berman, our professionals help protect and enhance the value of the club's facilities, so members know their investment is in good hands. We focus on the operational metrics that matter to the Board, delivering efficient and member-experience-driven results year after year.

The Benefits of Professional Club Management

A dedicated management partner frees club leadership from the day-to-day work of coordinating vendors, chasing repairs, and tracking budgets, so they can focus on the member experience.

Our hands-on dedication means an outstanding on-site presence. We help build relationships with members, committees, and staff, and we maintain the club with proactive maintenance. From caring for the clubhouse to planning capital projects, Berman helps the club get the most from every dollar of dues and assessments.

FULL-SERVICE CLUB MANAGEMENT

Asset & Capital Planning

- ✓ Annual Operating Budget Preparation
- ✓ Capital Reserve & Long-Term Planning
- ✓ Clubhouse & Amenity Renovation Planning
- ✓ Vendor & Concession Contract Administration

Board-Ready Reporting

- ✓ Facility & Grounds Inspection Reports
- ✓ Monthly Operations Reports
- ✓ Monthly Financial Reports for the Board

Club Accounting Support

- ✓ Member Dues & Assessment Billing
- ✓ Vendor Payment Processing
- ✓ Financial Reporting & Budget Variance

Club Care & Maintenance

- ✓ Preventive Maintenance
- ✓ Operations Management
- ✓ Facility Inspections
- ✓ Project Management
- ✓ Contract Negotiations

BERMAN

Golf Course & Grounds

The Grass is Greener with Berman

Berman is a full-service club, property, and facility services company that provides hassle-free grounds care for every acre members see, from the front entrance and clubhouse gardens to the practice facility and course perimeter.

We do more than cut the grass. Our skilled team includes horticulturists, irrigation specialists, turf specialists, and detail gardeners who have cared for some of the world's most famous commercial gardens, golf courses, and theme parks. We work hand in hand with your Golf Course Superintendent, so playing surfaces and surrounding landscapes look like one seamless property.

Our Grounds Services

We understand that every club has its own character and standards. To match your vision, we offer personalized grounds programs: manicured entry features, seasonal color at the clubhouse, shaded cart paths, and tidy pool and tennis surroundings.

Our grounds services keep the club in tournament-ready condition year-round. Scheduled maintenance is planned around tee times, member events, and course closures, and all work is completed promptly with high-quality, quiet-running equipment, so the club keeps a polished appearance at all times.

FULL-SERVICE GROUNDS CARE

- Turf & Common-Area Mowing
- Clubhouse & Entry Gardens
- Turf Nutrition, Weed & Pest
- Landscape & Bunker-Edge Renovation
- Tree Care & Removal
- Mulch & Pine Straw
- Storm Prep & Debris Removal
- Irrigation Repair & Installation

Clubhouse Housekeeping

Make a Spotless Impression with Berman

It's not just about cleaning. It's about the first impression a member feels walking into the lobby, the locker room, or the dining room. A spotless clubhouse reflects the standards of the entire club.

One of Berman's largest divisions is our janitorial and housekeeping line of business. We help clubhouses, locker rooms, pro shops, fitness centers, ballrooms, and dining rooms put their best foot forward, with overnight deep cleaning and discreet day porters who keep high-traffic areas fresh while members are on property.

Clean and Green with Berman's Eco-Friendly Standards

We use our Excellence in Service program (ES program) to carefully maintain and manage all housekeeping procedures. Our dedication to cleanliness, combined with trained professionals, delivers an exceptional level of cleanliness, safety, and member service.

At Berman, we use approved Green Seal chemicals to reduce environmental impact, gentle on fine finishes, millwork, and natural stone. We are fully trained in Leadership in Energy and Environmental Design to help maintain LEED certification.

FULL-SERVICE HOUSEKEEPING

- Nightly & Daily Clubhouse Cleaning
- Carpet & Upholstery Care
- Day Porter & Locker Room Service
- Disinfection Services
- Window Cleaning
- Floor Care, Stone & Hardwood

BERMAN

Club Security

Highly Trained Security Professionals. Backed by Next-Level Tech.

Gatehouse & On-Site Security. Our experienced officers welcome members by name, verify guests and vendors, and maintain a safe environment that brings peace of mind to members, staff, and their families.

Mobile Patrols. Our mobile patrol units cover the course, cart paths, maintenance yard, and member neighborhoods after dark, handling disturbance calls, checking amenities at closing, and more.

24/7 Camera Remote Monitoring. Designed to keep the clubhouse, cart barn, and high-value equipment safe at all times, our remote monitoring works with our state-of-the-art Command Center so the property is always under a watchful eye.

Event & Tournament Security. From member-guest tournaments to weddings and holiday galas, we provide traffic control, credential checks, and discreet uniformed or plain-clothes presence.

FULL-SERVICE CLUB SECURITY



Clubhouse & Dining Venues



Gatehouse & Entry Control



Golf Course & Maintenance Yard



Member Residential Communities & HOAs



Pool, Tennis & Fitness Amenities



Events & Tournaments



Renovation & Construction Sites

On-Demand Repairs

24-Hour Repair Services

On-Call Club Maintenance and Repair. A walk-in cooler down before a Saturday banquet? A leak in the men's locker room? Give Berman a call. We're on call 24/7 for emergency maintenance requests, so your team doesn't have to be.

Rapid Response, Day or Night. Many companies offer repair services, but few are available on demand around the clock. For emergency calls, our goal is to have a technician on site within one hour, subject to time of day, traffic, weather, and site conditions; response commitments are defined in the service agreement. Our repair specialists are cross-trained in multiple trades, so one call covers most issues.

Preventive Care. Sometimes the best way to avoid an emergency is preventive maintenance. Whether you need help right away or want the clubhouse, pool equipment, and cart barn kept in peak condition before season, our professionals can help.

FULL-SERVICE REPAIRS

- HVAC Repair
- Electrical Repair
- Plumbing Services
- Storm Damage & Disaster Repair
- Fire Damage Restoration
- Clubhouse & Locker Room Repairs
- General Repairs
- Cart Barn & Maintenance Facility Repairs

BERMAN



03

OUR TEAM

Trust your club with Berman.

Our Leadership Team



Martin C. Berman

Founder & President

20 Years With Berman
20+ Years In the Industry

As President and Founder, Marty leads Berman's overall strategy as well as the sales and marketing teams. He is responsible for the company's continued growth and for ensuring Berman gives back to the communities where we operate. A licensed general contractor and certified safety trainer, he speaks nationally on country club, property, and facility management, customer service, and safety.

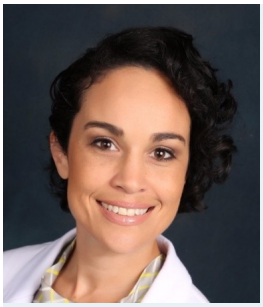


Samantha Sharenow

Senior Vice President

17 Years With Berman
17 Years In the Industry

Samantha joined Berman in 2007 and rose to SVP. She oversees all Administration and Human Resources and leads our Executive Management Team. She has supported numerous Berman club management accounts.



Yolanda Vela

Director of Human Resources

15 Years In the Industry

Yolanda leads on-site and off-site HR teams for large, multi-location workforces, with deep expertise in payroll and HR technology that connects timekeeping, payroll, reporting, and compliance.



Matthew Davenport

Director of Management Services

20 Years In the Industry

An Air Force veteran with nearly 20 years in on-site management and hospitality, Matthew has led hotels, resorts, clubs, and commercial portfolios with people-first leadership and disciplined execution.



Stella Miller

Business Development Manager

10 Years In the Industry

Stella builds strategic client partnerships, working closely with clubs to understand their operational needs and connect them with Berman's property, facility, workforce, and support solutions.



04

RELEVANT EXPERIENCE

Trust your club with Berman.

Club & Hospitality Experience

Private clubs demand a blend of hospitality, discretion, and technical skill. Berman's portfolio brings all three, from country clubs to master-planned communities and some of the most notable amenity-rich destinations in Florida.



Trusted by Elite Clubs

Our relevant experience includes providing club management, workforce solutions, and service operations at multiple Platinum Clubs of America Top 20 award-winning country clubs and courses in Florida, some of which also rank among the Top 20 in the world. We are who the elite clubs use to manage their workforce and operations. All of our clients require strict NDAs for club privacy reasons, and we are happy to connect the Board directly with our previous and current clients.

Tournament & Event Expertise

Our expertise is routinely used at premier PGA and LPGA tournaments in Florida and the clubs that host them. Our large-scale club event division supports some of the biggest-name tournaments in the state.

Property & Facility Leadership

In addition to our club experience, Berman is one of the largest providers of property and facility services in Florida. Our properties are typically very large, complex mixed-use environments, and the same philosophy we use in our club management division is deployed at some of the area's most notable commercial properties and communities.

References available upon request.

Please feel free to engage with us directly, and we will connect the Board with our club and property references.



05

PRICING

Trust your club with Berman.

Scope of Services

Berman shall provide staff to complete the club management services outlined below for University Park Country Club.

✓ GENERAL	• Berman will serve as the accountable partner for all human resources duties, payroll and benefits administration and processing, and all human resources-related functions and required administration. • Berman will also employ and manage your entire on-site team as your third-party employment partner.
✓ THIRD-PARTY EMPLOYMENT PARTNER	• Berman recruits, hires, and onboards your club team • Team members are Berman employees, paid on Berman's payroll • Wages, payroll taxes, workers' comp, and benefits administered by Berman and billed to the club at cost • Staff dedicated and assigned to the club contract • Berman supervises, trains, and manages the human resources on-site and off-site, and provides other training and supervisory scope on-site at the discretion of the club
✓ HUMAN RESOURCES & WORKFORCE ADMIN	• Recruitment coordination, candidate screening, and hiring support • New-hire onboarding and employee records • Personnel policies, handbook administration, and documentation • Employee relations and performance-process support • Training coordination, offboarding, and record retention
✓ PAYROLL & EMPLOYEE SUPPORT	• Timekeeping and payroll data collection • Payroll review, processing coordination, and exception resolution • New-hire, pay-change, and separation workflows • Payroll reporting, reconciliations, and labor-cost allocation • Benefits enrollment and leave administration coordination
✓ PLATFORMS	• Services are managed through Berman's established technology platforms: ◦ **Paycor** for payroll processing and records, W-2 administration, expense reimbursements, and manager approval workflows ◦ **Oracle NetSuite** for general ledger, accounts payable, purchase orders, bank matching, payroll imports, reconciliation, and financial reporting ◦ **Microsoft SharePoint** for operating procedures, HR documents, the employee handbook, training materials, and standardized workflows ◦ **Workforce timekeeping and field systems**, including biometric timekeeping and Mobohubb workforce management tools ◦ **Additional back-office tools** as the engagement requires • Berman is happy to use and integrate with any of the club's existing on-site software in lieu of these systems, with the exception of payroll when Berman is processing payroll on our own platform.
✓ EXCLUSIONS	• The base program excludes full turnkey club management services. These are offered for additional pricing, shown as a turnkey price on the pricing page. • All liability releases and formal contract language to be mutually discussed during contract finalization.

University Park Country Club
Club Management Services

The pricing below is in accordance with the scope of work contained in this proposal.

SERVICE	COST	WHAT'S INCLUDED	NOTES
FULL HR & THIRD-PARTY WORKFORCE PARTNERSHIP	**6%** of gross payroll	Everything listed in the Scope of Services on page 28, including Berman hiring and employing all club staff and providing all HR, payroll, and benefits administration. Berman will also provide an on-site HR representative at our own expense, with on-site hours scaled to club headcount.	Wages, employer payroll taxes, workers' comp, and benefits are billed to the club at cost, in addition to Berman's 6% fee. See Pricing Terms on page 30.
EMPLOYEE ONBOARDING	**$100** per employee (one time)	All employee onboarding, payroll setup, benefits setup, and related onboarding tasks.	Applies to every current employee transitioned at go-live and to each new hire after.
CAPITAL EXPENSE PLANNING & CONSTRUCTION MANAGEMENT / ADMINISTRATION	**10%** of project cost	Berman can plan, manage, execute, and administer your capital improvement (CapEx) projects with our in-house Construction Management team.	Berman is a licensed State of Florida general contracting firm (CGC #1518721), which allows a reduced cost for clients who use us as an owner's representative to oversee large or small projects on site.
OPTIONAL (ONLY IF ELECTED BY THE BOARD): FULL TURNKEY CLUB MANAGEMENT	**1.75%** of gross revenue (optional; in addition to the 6% payroll fee)	Full club management responsibility, should the Board elect to have Berman manage the entire club operation.	Full liability and responsibility to run every area and aspect of the club at the direction of the Board of Directors. All employee and club operating costs are paid by the club, in addition to Berman's fee.

Pricing Terms

The following terms apply to the pricing on the previous page and will be finalized in the service agreement.



Gross Payroll

Gross payroll means gross wages paid to club staff, including regular, overtime, bonus, and PTO pay. Berman's 6% fee is calculated on gross payroll only.



Pass-Through Costs

Wages, employer payroll taxes, workers' compensation, and benefits are billed to the club at cost each pay period and funded by the club before each payday. Berman's 6% fee is in addition to these costs.



Employee Onboarding

The one-time $100 onboarding fee applies to every current employee transitioned at go-live and to each new hire after.



On-Site HR Representative

Provided at Berman's expense, with on-site hours scaled to the club's headcount and defined in the service agreement.



Optional Turnkey Management

The 1.75% fee applies only if elected by the Board and is in addition to the 6% payroll fee. Gross revenue means all club operating revenue (dues, F&B, golf, events, and retail), excluding capital assessments, initiation fees, and sales tax.



THANK YOU

UNIVERSITY PARK COUNTRY CLUB

Trust your club
with Berman.



TROON®

TROON PRESENTATION FOR:

University Park Country Club
Sarasota, FL

October 19, 2026

UNIVERSITY PARK
Country Club

AGENDA FOR MEETING

UNIVERSITY PARK
Country Club

1 *INTRODUCE TROON*

2 *RELEVANT EXPERTISE & RESOURCES*

3 *VALUE PROPOSITION FOR UPCC*

4 *QUESTIONS & ANSWERS*

MYTHS VS. REALITY

MYTH

“Troon is going to come in and run things the way they want to.”

REALITY

We are not an owner or a lessee in this case; we are agents of the Club membership and Board. We are similar to a stand-alone GM only on a larger platform with much greater resources. We find ways to do what the Club wants to do more effectively and efficiently.

MYTHS VS. REALITY

MYTH

“Troon is going to come in and fire all the staff.”

REALITY

Our intentions are not to fire anyone – we want leaders at every level of the Club, and those who are excited about quality, professionalism, career opportunities, and accountability will do very well. Performers want to be recognized and held accountable!

MYTHS VS. REALITY

MYTH

“Troon is so big, we are going to get lost in the system and not get personalized attention.”

REALITY

We have regional offices to include Bradenton which enable us to have personalized support with local market knowledge. The simple fact is our scale is such that we can devote more diversified resources to your club – not less – even as we add additional properties.

MYTHS VS. REALITY

MYTH

“Troon is too expensive.”

REALITY

The fact of the matter is we are net positive in nearly all of our contracts when you consider cost savings in benefits, insurance, procurement, operational efficiencies, and associate retention before revenues are even considered. Troon’s ability to consistently grow over the last 30+ years is a testament to being able to deliver results to our clients and show greater value than the associated fees.

MYTHS VS. REALITY

MYTH

“Troon is going to put their brand everywhere and we are going to lose our identity.”

REALITY

The Club can choose to use the Troon brand as much or as little as they wish – we just believe that it’s nice to have a choice.

TROON PRESENCE - SWFL



★Troon Corporate Office

BALANCED SCORECARD APPROACH



- ✓ HEALTHY GOVERNANCE & ORGANIZATIONAL CLARITY
- ✓ LEVERAGE COMPETITIVE ADVANTAGE
- ✓ MEMBERSHIP SATISFACTION
- ✓ RETAIN & DEVELOP ASSOCIATES
- ✓ ACHIEVE SALES/BRAND GROWTH
- ✓ MEET FINANCIAL TARGETS
- ✓ FUEL FOR GROWTH (CAPITAL + IMAGINATION)

DRIVING MEMBER SATISFACTION

- LISTEN FIRST TO UNDERSTAND PAST, PRESENT, AND DESIRED VISION
- DELIVERING A **CONSISTENT** FIRST-CLASS & PERSONALIZED EXPERIENCE, EVERY DAY
- ADHERE TO DETAILED QUALITY STANDARDS ALIGNED WITH MEMBER EXPECTATIONS
- PROVIDE EXTENSIVE ASSOCIATE TRAINING & INTEGRATE BEST PRACTICES

SUPERIOR RESOURCES

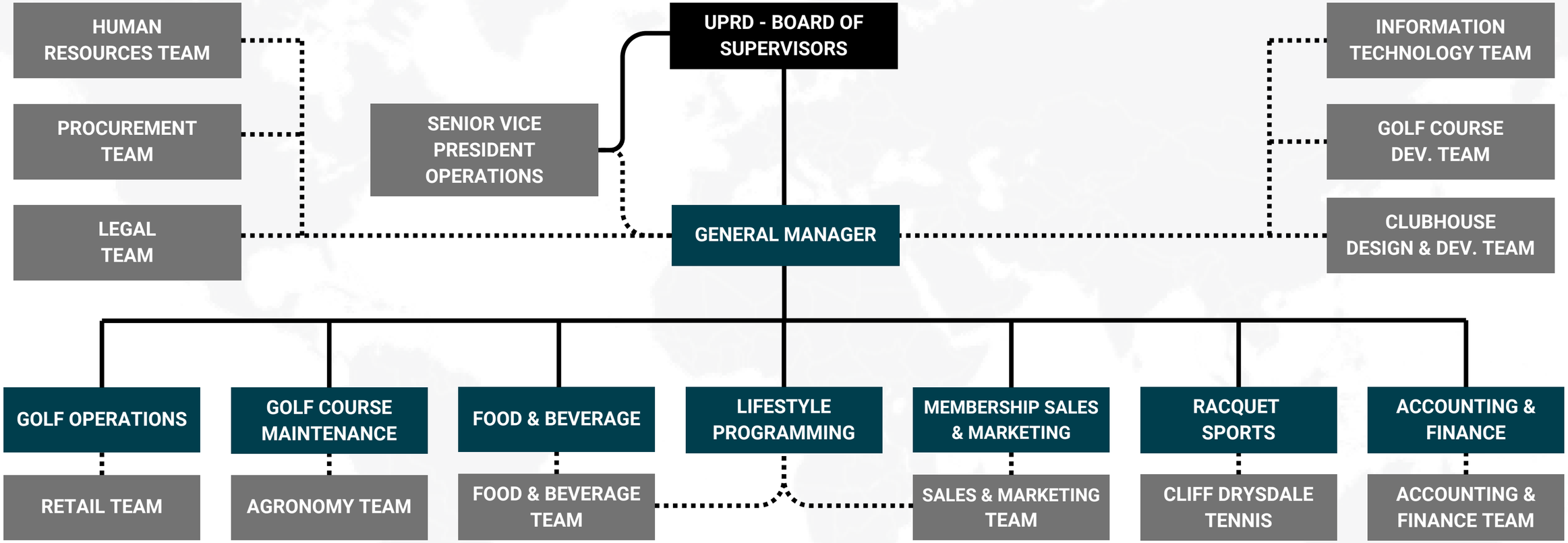
TROON®



All Troon clubs benefit from the resources and expertise of a global company, while maintaining the personalized service and feel of a local management team, with support in areas including:

- Club Operations
- Food & Beverage
- Sales & Marketing
- Finance & Accounting
- Human Resources
- Procurement
- Agronomy
- Legal
- Technology
- Retail
- Design & Development
- Risk Management
- Racquet Sports
- Golf Instruction
- HOAs

SUPPORT STRUCTURE



KEY

TROON CORPORATE SUPPORT

ONSITE STAFF

OUR BRADENTON SUPPORT TEAM



RICH RIFFLE
Senior Vice President, Operations



JASON ELLIS
Director, Science & Agronomy



DAVID PLEVIN
Senior Corporate Director, Food & Beverage



SCOTT GORDY
Director, Human Resources



STACY KANSKY
Director, Marketing & Communications



DAVE ELY
Director, Retail

DESIGN AND DEVELOPMENT

Specializing in high-quality new build and renovation projects of all sizes

40+ years of experience serving the finest properties in golf

Focus on ensuring operational viability & fiscal responsibility of the investments made



300+

GOLF COURSE

DEVELOPMENT & RENOVATION PROJECTS



800+

CLUBHOUSE

DEVELOPMENT & RENOVATION PROJECTS



RON DESPAIN

SVP Golf Course Construction



DAVE NICHOLLS

EVP, Science & Agronomy



ED DOYLE

President, RealFood



CJ AMETRANO

Vice President, Des. & Dev.

First vision to everyday operations

we cover the hospitality business lifecycle

1 PLANNING & STRATEGIC DEVELOPMENT

BUSINESS & FINANCIAL PLANNING

Financial Modeling & Capital Budgeting Business Plan Development

Market & Demographic Analysis

F&B MASTER PLANNING

Food & Beverage Strategy

CONCEPT DEVELOPMENT

Restaurant Concept Development

Guest Experience Design

Menu & Service Direction

BRAND IDENTITY DEVELOPMENT

Brand Strategy

Name & Logo Development

2 HOSPITALITY DESIGN

RF DesignStudio

COMMUNITY PLANNING & DESIGN

EXPERIENCE PROGRAMMING

INTERIOR DESIGN FOR VARIOUS ENVIRONMENTS

KITCHEN & BAR DESIGN

FF&E PROCUREMENT

SPECIALTY DESIGN SERVICES

THIRD-PARTY CONSULTANT MANAGEMENT

3 RESTAURANT & HOSPITALITY OPERATIONS

ASSESSMENTS

F&B Operations Assessment

Kitchen & Bar Physical Plant Evaluation

MENUS

Menu & Recipe Development

OPERATIONAL SYSTEMS

BOH / FOH Systems Development

Training Systems Development

LAUNCH

Pre-Opening Strategy & Support On-site Training

Go-Live Support

4 F&B MANAGEMENT

FULL-SERVICE F&B MANAGEMENT

Strategic Vision Implementation

Operations Management

Quality Control

Financial & Back-office Operations

Leadership & Training

STRATEGIC ADVISORY

Leadership Development

Management Advisory Services

RealFood®

hospitality | strategy | design

COST EFFICIENCIES

Longstanding vendor relationships ensure clients enjoy access to a procurement network of preferred brands, suppliers, distributors, service providers and industry professionals. The portfolio's buying power is leveraged to negotiate best-in-market terms, service and pricing for our valued clients.

TALENT ACQUISITION

- *Troon employs more industry professionals than any other company in club management*
- *Talent Acquisition services are included within our management fee*
- ***The Board Has Final Approval on All Key Hires***



ACTIVE INTERNAL POSTINGS
Internally managed job postings through the Recruiting Office ensure timely visibility, efficient candidate flow, and alignment with organizational priorities.

INDUSTRY RELATIONSHIPS
Established partnerships with leading industry organizations such as the PGA, CMAA, and GCSAA strengthen access to credentialed professionals and emerging leaders.

INDUSTRY REFERRALS
Referrals from trusted industry contacts and Troon-managed properties provide proven, culture-fit candidates with strong operational experience.

COLLEGE PARTNERSHIPS
Ongoing relationships with key universities support early talent identification and long-term leadership development.

CAREER EVENTS
PGA Minority Career Fair, College Career Fairs, and other recruiting opportunities

DESKTOP ANALYSIS - OPPORTUNITIES

OPPORTUNITY	ESTIMATED SAVINGS
Future Search Fees	($60,000 - $80,000)
Net Impact of HR Platform	($75,000 - $90,000)
Agronomy Efficiencies	($50,000 - $75,000)
FY '27 Capital Projects	($10,000 - $20,000)
Kitchen Renovation	($100,000 - $125,000)
Total Initial Estimated Savings	**($295,000) - ($390,000)**
Troon Management Fee	$325,000
Net Effect	**$30,000 - ($65,000)**

OTHER ITEMS FOR CONSIDERATION:

- *Procurement impact and value engineering of future golf course projects & fitness/wellness center*
- *Evaluation of F&B to optimize operation and minimize waste without compromising quality*
- *Migration to Troon's property insurance program*
- *Implementation of dynamic pricing for daily fee golf*

VALUE PROPOSITION FOR UPCC

LOCAL RESOURCES & OPERATING PLATFORM TO SUPPORT ONSITE TEAM

FOCUS ON DRIVING MEMBER SATISFACTION NOT PROFITABILITY

COMPREHENSIVE HR SUPPORT TO PROVIDE EMPLOYMENT PLATFORM & EXECUTE FUTURE HIRES

IN-HOUSE EXPERTISE TO ENSURE FUTURE CAPITAL PROJECTS ARE ON-TIME/BUDGET

UNMATCHED ECONOMIES OF SCALE TO MAXIMIZE OPERATING EXPENSES

PROVEN SUCCESS IN DYNAMIC MEMBER-OWNED OPERATING ENVIRONMENTS

TRANSITION TIMELINE - 1/1/2027

	Partnership Commencement	Days 1-7	Days 8-30	Days 30+
OPERATIONS	Management agreement starts with Transition Team onsite	Initiate Troon 60-90 day assessment process	30-day review of transition	60-day review → 90-day review → Meetings w/ Board to discuss transition, assessment and overall Club strategy
COMMUNICATIONS		Announce via marketing, public relations & social media (OPTIONAL)	Member Town Hall Meeting	
SURVEYS		Troon sends letter & survey to members & staff	Survey results shared with Board	
HUMAN RESOURCES			Staff migrates to Troon Employment Platform (Date TBD)	

PROPOSED BUSINESS TERMS

INITIAL TERM

5 *Years*

BASE MANAGEMENT FEE

325K

YOY INCREASE:
LESSER OF 2.5% OR CPI

TERMINATION PROVISION

After year 3 ***and beyond, if financial goals are missed in consecutive years***

INCENTIVE MANAGEMENT FEE

20%

Member Satisfaction
+
Associate Satisfaction
+
On-Time/Budget CIP

NEXT STEPS

01

Continued due diligence under NDA
(if desired)



02

Refinement of proposal & desktop analysis



03

Sharing of References



04

Negotiate agreement & collaborate on transition process





TROON®

THANK YOU!

UNIVERSITY PARK
Country Club

FrankCrum®

PAYROLL • INSURANCE • BENEFITS • HR

Date:

10/15/2026

Proposal For:

Park Boulevard Management LLC

FL Lic. GL 100 FL Lic. GL 45

WE FOCUS ON YOU.

YOU FOCUS ON YOUR BUSINESS.



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We are pleased to offer this proposal and look forward to helping your business succeed.

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QUESTIONS?

Contact us at: 877-695-6207 | salesadmin@frankcrum.com

WE ARE YOUR PARTNER IN "EMPLOYMENT"

FRANKCRUM IS A PROFESSIONAL EMPLOYER ORGANIZATION (PEO)





WHAT IS A PEO?

- A PEO becomes a co-employer with your business to relieve you of many tasks and responsibilities that come with being an employer.
- You can cost-effectively delegate responsibilities of HR, employee benefits, payroll, and workers' compensation to FrankCrum.
- We become the employer of record for your company, transferring liability to us for those areas of responsibility.
- You remain the on-site employer, and you control the direction and management of your employees.
- We enable you to offer top employee benefits, and we administer them for you.
- We provide you with affordable workers' comp and allow you to pay as you go with each payroll.
- You cut costs, save time, and focus on your business. Plus, you become a GREAT Employer!

WORK SMARTER

WITH FRANKCRUM

FREE UP TIME

Our dedicated pros and easy-to-use tech take HR tasks — like payroll and transactional processing, employee onboarding, workers' comp claims handling, and benefits administration — off your plate so you can focus on growing your business.

ATTRACT AND RETAIN TALENT

Deliver big-company benefits — health, 401(k), dental/vision, disability, even pet insurance — with a seamless, modern employee experience at a fraction of the cost.

STAY CONSISTENTLY COMPLIANT

Avoid costly violations and maintain compliance with our automatic tax filings, E-Verify, and OSHA reporting services, as well as monitoring state / federal regulations such as FMLA, COBRA, FSLA, OSHA, ERISA, just to name a few.



47% OF SMBS SAY THEY SPEND TOO MUCH TIME ON COMPLIANCE.
U.S. Chamber of Commerce, Small Business Index

PEO CLIENTS SAVE AN AVERAGE OF 27.2% ANNUALLY ON HR COSTS.
NAPEO

REDUCE RISK AND LIABILITY

We help protect your business from lawsuits and workplace issues by providing expert HR guidance, safety programs, and critical insurance coverages to reduce your financial exposure.

GOLD-STANDARD GUIDANCE

Get expert, personalized guidance from our dedicated team of professionals. From payroll to HR and risk management to benefits, we have you covered.

SAVE MONEY

Leverage our group buying power for better rates on benefits, insurance, and other products while reducing administrative overhead by outsourcing HR functions to us.

INTRODUCTION





HALEY CRUM, FRANK W. CRUM, JR., AND MATT CRUM

WE ARE A BUSINESS PARTNER YOU CAN TRUST

WE TAKE GREAT PRIDE IN DOING THE RIGHT THINGS FOR THE RIGHT REASONS.

45 YEARS FrankCrum

OUR COMMITMENT TO SERVICE BEGINS WITH THE CRUM FAMILY, BUT IT DOES NOT END THERE...

- Haley and Matt Crum joined their father in leadership positions at FrankCrum, the enterprise Frank W. Crum, Jr. and his father founded in 1981.
- We serve businesses with as few as one employee to more than 5,000.
- We serve more than 4,500 clients nationwide, have over 100,000 worksite employees, and issue over 120,000 W-2s each year.
- Frank Winston Crum Insurance, a licensed and admitted insurance carrier, was founded in 2003 to serve our PEO clients with affordable workers' comp coverage – your risk is our risk.
- We employ over 500+ corporate team members to serve our clients.
- No call centers. We provide personalized service from dedicated team members.
- We have our own technology and product management teams focused on delivering customer-centric solutions.

AM BEST B++ Good

BY PARTNERING WITH FRANKCRUM,

YOU CAN BUILD A HAPPIER, MORE LOYAL WORKFORCE.

AS AN ADDED BENEFIT, WE HELP MAKE YOU A GREAT EMPLOYER.



HERE'S WHAT YOUR EMPLOYEES CAN EXPECT:

RELIABLE PAYROLL SERVICE
Receive direct deposit, pay cards, and online access for employees

SUPPORT FOR A 401(K) RETIREMENT PLAN
A plan that doesn't cost employers to offer or administer

ACCESS TO W-2s
Access W-2s electronically for tax preparation

ANYTIME ACCESS TO PAY STUBS AND OTHER HR INFO
Available online or mobile via our self-service portal

EASILY REQUEST PTO
See history and available hours – online or mobile

TOP BENEFITS OPTIONS
Including pre-tax deductions, and discount plans available to employees with or without the need for an employer contribution



OUR SOLUTIONS



COMPREHENSIVE SOLUTIONS

WE DESIGN SOLUTIONS WITH YOUR BUSINESS IN MIND.



WORKERS' COMPENSATION INSURANCE

- Great rates through our own licensed and admitted carrier
- No down payment AND pay-as-you-go program
- Friendly, responsive claims service
- Coordinate return-to-work programs
- Expert advice and support to mitigate risk and liability
- Safety inspections, fraud investigations, and recommendations
- No time-consuming and costly annual audit



PAYROLL PROCESSING AND TAX ADMINISTRATION

- Accurate and on time
- Direct deposit and pay cards
- Complex payrolls such as multi-state, certified, job-costing, multiple pay rates, holiday and overtime pay
- Wage garnishments
- Per diems/non-taxable reimbursements
- Federal and state tax filing



HUMAN RESOURCES

- Serve as an extension of your HR resources
- Process unemployment claims
- Guidance on employment practices, compliance, and procedures
- Employer Practices Liability Insurance (EPLI)
- Comprehensive employee handbook preparation or review
- Virtual training opportunities and webcasts on essential topics
- Provide forms related to HR functions
- Self-service HRIS portal: MyFrankCrum™
- Assistance with recruiting, including direct hire, contract, or contract-to-hire placements



BENEFITS

- Offer top, cost-effective benefits plans from national providers, including health, dental, vision, 401(k), flexible spending accounts, and supplemental insurance
- Section 125 plans
- Complete benefits administration with intuitive web-based enrollment portal
- Credit union and discount plans

FrankWinstonCrum INSURANCE

WORKERS' COMPENSATION INSURANCE

AFFORDABLE, RESPONSIVE & RELIABLE

FrankCrum and Frank Winston Crum Insurance share a commitment to provide PEO clients protection from the risk of loss. We have a stake in your success because your losses are our losses.





WORKERS' COMPENSATION HIGHLIGHTS

- Reliable and affordable workers' compensation
- No down payment, pay-as-you-go program, no year-end audit
- Nationwide network of medical providers
- Managed pharmacy program

CLAIMS MANAGEMENT

- Multiple, convenient options for reporting claims, 24 hours a day
- Efficient claims processing and compliance with state rules and regulations
- Resources and expertise to control claims costs and expenses

SAFETY AND RISK MANAGEMENT

- Worksite consultations to identify hazards
- Safety program creation
- Library of safety training resources
- Year-end OSHA 300 reports
- OSHA workers' comp posters

RETURN-TO-WORK PROGRAM

- Return employees to modified roles and minimize lost productivity
- Options when alternative roles aren't available
- Claims cost reduced while giving the worker time to heal

EMPLOYEES GAIN

- Protection in case of injury
- Efficient claims benefits
- Expedient quality medical care
- Prescription card system

EMPLOYERS GAIN

- Assistance managing safety
- Ability to pay as you go and eliminate audits
- Reduced cost of medical services and Rx
- Assistance returning employees to work

HUMAN RESOURCES

FAST, COURTEOUS, ACCURATE RESPONSES TO COMPLEX HR ISSUES

Our experienced and credentialed HR professionals, known as FrankAdvice, will help you manage your workforce and maintain legal compliance.





BENEFITS AND VALUE OF FRANKADVICE

- Fast, courteous, and accurate responses to complex and everyday HR issues, questions, or needs
- Save on expense to assist with handbook preparation, drafting of policies, and updates
- Help with compliance for laws/regulations and informed decision-making based on sound HR advice

FRANKADVICE INCLUDES:

- Unlimited phone and email access to our HR resources
- Discussion and expert advice on topics such as hiring practices, corrective action, termination, documentation, performance management, discrimination, wage and hour issues, federal acts, and more
- Comprehensive employee handbook preparation or detailed review of existing handbooks or policies
- Assistance creating clear, detailed, and uniform job descriptions
- Ability to schedule virtual meetings to provide information or training on important topics
- Availability of other forms and publications related to HR functions
- Emails on various topics and important changes in employment laws
- Monthly newsletter with recent local, state, and federal developments related to labor and employment

myFrankCrum™

HR TECHNOLOGY THAT INSPIRES BUSINESSES TO BE THE BEST THEY CAN BE

HUMAN RESOURCES, PAYROLL, AND BENEFITS PLATFORM



HRIS WITH A MODERN DESIGN THAT'S USER-FRIENDLY, FAST, AND INTUITIVE

MyFrankCrum, our proprietary HRIS, is designed for quick access to the most popular functions, making tasks easier for managers, payroll professionals, and employees. Managers can see important updates, like pending time-off requests, right on the homepage. This user-friendly technology also makes entering payrolls and updating employee information a snap.

PLEASE REQUEST A DEMO OF OUR MYFRANKCRUM SELF-SERVICE PLATFORM.

HERE ARE JUST SOME THINGS MYFRANKCRUM MAKES EASY:

- Employee onboarding
- Payroll submission
- Time off tracking
- Time clock data import
- Employee records management
- Benefits enrollment
- Workers' compensation certificates
- Reporting and custom dashboards
- Resource library for HR, safety, and news
- Customize colors and logo for your brand
- Applicant Tracking System (ATS) integration (add-on)
- Custom onboarding forms (add-on)

EMPLOYEES WILL LOVE THE HOMEPAGE THAT PROVIDES QUICK VIEWS OF RECENT PAYCHECKS AND TIME-OFF BALANCES. THEY CAN ALSO:

- Request time off
- Access pay history
- View and print W-2s and pay statements
- Change direct deposit preferences
- Manage personal information
- Enroll in available perks and benefits
- Receive company communications

Mobile functionality was built-in from the start so that you can use MyFrankCrum from any device. For information related to our API offering, visit https://developer.frankcrum.com/



BENEFITS MANAGEMENT

PROVIDING COMPETITIVE BENEFITS FOR YOUR ORGANIZATION

FrankCrum helps you deliver top benefits plans—including health, dental, vision, 401(k), flexible spending accounts, and supplemental insurance—from leading national providers. We support benefits planning, compliance, and ongoing management for both FrankCrum-sponsored plans and client-sponsored plans when we are the Agent of Record (AOR).

BENEFITS MANAGEMENT

- Reconciliation of premiums and timely remittance to carriers
- Eligibility notifications for adding newly hired employees
- Processing employee enrollment, change, and termination requests with the carrier
- COBRA administration
- Dedicated, knowledgeable team to assist with communications to the carriers
- Online benefits enrollment

BENEFITS AND COMPLIANCE DECISION SUPPORT

- We explore tailored benefits solutions and options – not only for costs but for employee utilization
- We provide proactive guidance and support with the ever-changing ACA regulations, COBRA/ARPA administration, compliance planning, insurance premium reporting on W-2s, exchange notice forms, variable hour employee reporting, Form 1094/1095 ACA reporting, regulatory benefit filings (FORM 5500), and more.



BENEFITS
PLAN OPTIONS

QUALITY EMPLOYEE BENEFITS HELP ATTRACT AND RETAIN VALUED EMPLOYEES

HEALTH INSURANCE: MAJOR CARRIERS

- Available to eligible employees
- Discounts on weight loss programs, fitness memberships, and hearing aids
- Plans may include term life insurance
- Groups are subject to underwriting
- Minimum Essential Coverage (MEC) plans available to applicable large employers needing to avoid the ACA Employer Mandate pay or provide 4980H(a) penalty
- Participation and employer contribution requirements apply

MAJOR MEDICAL HEALTH INSURANCE:

- Available to employees working 30 hours or more per week
- Choose from multiple ACA-compliant plans based on specific needs
- Online access to health information, claims, and resources
- Participating employees receive $10,000 term life and AD&D insurance

MULTIPLE HEALTH CARRIER OPTIONS

FrankCrum offers access to both national and regional health plan carriers. FrankCrum-sponsored health plans include:

- Comprehensive medical coverage with a range of deductible and copay options
- Preventive care and wellness benefits
- Behavioral health and counseling support
- Life and disability insurance options
- Network flexibility to meet the needs of diverse workforces

All groups are subject to underwriting. Employee deductions are available on a pre-tax basis. Minimum participation and employer contribution requirements apply.

Beyond HEALTH INSURANCE

Unless noted, all plans are offered by MetLife, available to employees working 30 hours per week, and no employer contribution is required.

SHORT AND LONG-TERM DISABILITY
Employer-paid or voluntary options available

TERM LIFE AND AD&D
Employer-paid or voluntary options available

401(K) RETIREMENT SAVINGS PLAN (SLAVIC)
Numerous investment choices. Establishment fee applies. Plan docs, testing, audits, and Form 5500 are handled by FrankCrum at no extra cost.

SUPPLEMENTAL PRODUCTS
- Hospital Indemnity
- Accident
- Critical Illness
- Legal Services Plans

DENTAL
Multiple plans available; child and adult orthodontics



EMPLOYEE ASSISTANCE PROGRAM (ACENTRA/ HEALTH ADVOCATE)
Employees access a 24-hour emergency hotline for short-term problem resolution. Available to employers not participating in an Aetna health plan. Employer-paid option.

VISION
Eye exams, prescriptions, frame and lens allowances, etc.

FLEXIBLE SPENDING ACCOUNT (INSPIRA FINANCIAL)
Tax advantage reimbursement for qualified out-of-pocket medical and daycare expenses

HEALTH SAVING ACCOUNT (INSPIRA FINANCIAL)
Employees enrolled in a high deductible health plan can contribute pre/post-tax dollars for eligible expense reimbursement for themselves, spouses, and tax dependents

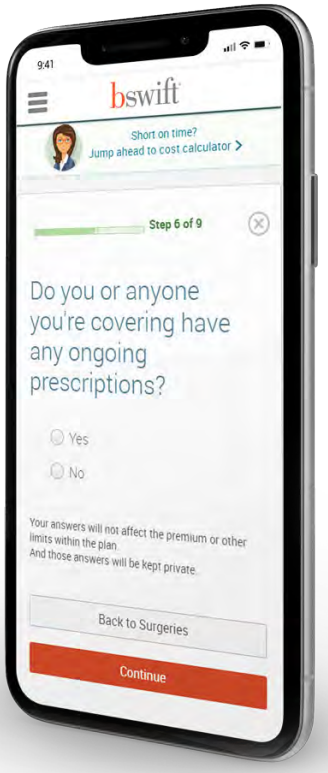
OTHER PERKS
- TicketsAtWork
- Alero Financial
- Pet Assure
- LifeLock with Norton
- Prescription Discount Plan



BENEFITS PLATFORM
BY BSWIFT

Our electronic benefits portal, bswift, integrates directly with MyFrankCrum for ease of administration and efficiency. Plus, its AI-powered virtual Assistant, Emma, helps employees navigate their health benefits.

MEMBERS CAN ACCESS THEIR BENEFITS FROM ANYWHERE USING THE BSWIFT MOBILE APP.



MEET ASK EMMA

Emma is your 24/7 guide through the world of health benefits. With her AI technology and user-friendly interface, she provides real-time, personalized support, understands queries accurately, and simplifies information search. Empowering employees to concentrate on what matters most, Emma allows them to navigate health benefits effortlessly.

Emma is fully integrated into the benefits enrollment platform and provides different degrees of education and support to fit each employee's needs:

- Personalized walkthroughs for "passengers" who like to be guided
- FAQs and explainer bubbles for "info detectives" who prefer to self-educate
- Standalone calculator and estimate breakdown for "number crunchers" who want to delve into every detail

THE ADVANTAGES OF ASK EMMA

Benefits selection can be overwhelming and confusing for employees, but Ask Emma delivers real results. In addition to a better enrollment experience, Ask Emma helps employees make informed healthcare decisions that can help reduce their out-of-pocket expenses.



PAYROLL: PROCESSING & TAX ADMINISTRATION

UNEQUALED REPUTATION FOR ACCURATE, ON-TIME PAYROLL SERVICES

PAYROLL PROCESSING

• Handling of complex payroll rules:

- Multi-state
- Job costing
- Multiple pay rates
- Departments
- Certified payrolls
- Holiday and overtime pay
- Job codes
- OCIP
- Direct deposits
- Per diems and non-taxable reimbursements
- Employee deductions

• Use of FrankCrum's payroll banking account eliminates the need for you to perform account reconciliation and the risk of banking account fraud
• Pay cards and electronic direct deposit statements are also available for paperless pay options
• Various time entry methods are supported, including automated salary or easy hourly time entry on our web portal
• Garnishment deductions, withholdings, and remittance to agencies
• PTO plan set up, accruals, balances, and tracking
• View popular dashboards and reports; customization options available

TAX MANAGEMENT

• W-2 and W-3 processing
• Unemployment claims
• Tax credits
• All payroll-related tax return preparation, filing, and payment
  -State withholding
  -State unemployment
  -Local taxes
  -940 and 941 filings with federal withholding

TIME & ATTENDANCE

• Web-based software, badge readers, or hand readers
• Cloud-based system that integrates directly with MyFrankCrum

FrankCrum
PAYROLL • INSURANCE • BENEFITS • HR

100+ Services
OFFERED BY FRANKCRUM

PAYROLL & TAX

Accurate, on-time payroll with full tax compliance

- Process/reconcile payroll & taxes
- Multistate payrolls & taxes
- Certified payroll reports
- Automatic SUTA/FUTA compliance
- Federal, state & local tax filing
- Unemployment taxes
- Tax credits
- Direct deposit & pay cards
- Compliant wage garnishment
- Non-taxable reimbursements
- Per diems
- W-2/W-3 processing
- 940/941 filings
- OCIP
- Employment verification
- Job-costing
- Multiple pay rates
- Time clock solution with geofencing
- Fringe benefits
- Employee deductions
- Off-cycle check runs
- Dedicated payroll coordinator
- Various time entry methods accepted

HR & COMPLIANCE

Strategic HR support for employee lifecycle management

- Learning Mgt System (FrankCrum TrainingHub)
- Create & update employee handbooks
- Wrongful termination claims assistance
- Unemployment claims administration
- Immigration & employment eligibility regulations
- Employment eligibility verification (E-Verify)
- Equal Employment Opportunity (EEO-1) reporting
- Discrimination issues
- Hiring practices
- Harassment prevention
- Wage & Hour
- Performance management, corrective action and termination
- Applicant Tracking System integration (ATS)
- Access to worksite posters
- Recruiting/placement services
- Workplace safety & standards regulations
- Equal opportunity & anti-discrimination legislation
- Job descriptions
- Employment oversight & administration laws
- Leave & benefits laws

HR INFORMATION SYSTEM (HRIS)

Easy online access for employees & employers

- Online portal for employers & employees (MyFrankCrum)
- Mobile-friendly access
- Online employee onboarding
- PTO & vacation tracking
- Employee records management
- Benefits enrollment
- Electronic benefits portal
- Reporting & analytics dashboard
- General ledger feed
- Developer API available
- Integrations with time clock, ATS, etc.
- Employee access to pay history, W-2s, etc.
- White-labeling capability
- Automated change audits
- Customizable access at the employee level

WORKERS' COMP & RISK MGT

Protection, claims support, & workplace safety programs

- Pay-as-you-go WC coverage with no down payment
- Year-end OSHA 300 reporting
- Multi-state WC coverage
- Manage WC claims
- WC claims review & loss analysis
- 24/7 WC claims reporting
- Post-accident drug test
- Return-to-work programs
- WC fraud investigations
- Notice of injury filing
- Self-service COI downloads
- Employment Practices Liability Insurance (EPLI)
- Drug Free Workplace program
- Background checks & drug testing
- Safety programs & training
- Safety inspections & worksite hazard recommendations
- Safety resource library
- Cyber liability insurance
- Pay-go general liability insurance
- No year-end WC audit

BENEFITS

Flexible benefits options & administrative support

- National & regional health plans
- Online benefits enrollment through bswift
- AskEmma, AI-powered benefits assistant
- Level-funded health plan options
- Custom employer-sponsored health plan options
- Individual Coverage HRA (ICHRA)
- Benefits administration
- COBRA administration
- Dental & vision
- HSA/FSA/DCAP accounts
- Prescription discount plan
- Critical illness, accident & hospital indemnity coverage
- Health Advocate
- Infertility support
- 401(k) retirement plans
- Life insurance
- Short-term & long-term disability
- Pet insurance
- Identity theft protection
- Legal services
- Credit union memberships
- Employee discount program for events, concerts, etc.
- Employee Assistance Program (EAP)

CUSTOMER SUPPORT

White glove service & more

- Dedicated implementation/onboarding support
- Dedicated payroll coordinator
- Dedicated HR consultant (FrankAdvice)
- Dedicated account manager
- Unlimited phone & email access to HR consultant
- Monthly HR newsletter & compliance updates (FranklyHR)
- Customer resource library - coming soon
- Business resource guide by state
- Federal & state employment regulation alerts
- Spanish-speaking assistance
- U.S.-based customer service

OUR PROPOSAL



This proposal is intended to provide information about the general terms and conditions under which the above-named firm will enter into an agreement to provide professional employer services.

Information contained in this proposal does not constitute advice on legal, tax, or insurance matters. For advice on these issues, you should consult a licensed professional.

Florida Rate Sheet For

PARK BOULEVARD MANAGEMENT LLC

Pricing Based On Annual Payroll Of **$7,094,100.00**

Exhibit A

10/15/2026

Payroll By Code	WC Code	Description	FICA (Employer's Share)	SUTA	FUTA	Workers' Comp Charge	Admin	Payroll Burden	Payroll Burden After SUTA Limits
$7,094,100.00	9060FL	Club--Country, Golf, Fishing or Yacht--All Emplc	7.65	0.35	0.60	1.51	0.80	10.91	9.96

Contingencies:

*** Rates only valid with receipt of three years of carrier loss runs valued within 60 days of start date or complete loss history if less than three years of prior coverage (loss affidavit accepted if no prior coverage), confirmation of Experience MOD of 1.30 or less, and documentation confirming payroll levels; rates subject to change upon review**

*** Wire transfer of funds required**

Additional Charges:

*** $0.00 non-refundable payroll & Workers' Comp enrollment fee (payable to FrankCrum)**

*** $500.00 fee per Workers' Comp Medical Only claim ($50.00 fee per incident only claim)**

*** $2500.00 fee per claim related to Indemnity/Death benefit payments and/or litigation**

*** EPLI is $1.00 per employee per week**

*** FrankAdvice, our superior human resource program, provides sound, practical, and professional guidance and materials on human resource topics for only $0.30 per employee per week**

*** Standard Human Resource Information System platform (MyFrankCrum), an online employee/employer self-service portal available at no additional charge.**

*** Delivery fee is the price of shipping and handling**

*** See Optional Services page of the full proposal for additional services and related fees.**

Client is automatically enrolled in our optional Cyber Protection Services program for $7.00 per week per company

Rates/Services are based upon consistent payrolls. Workers' Compensation coverage subject to approval by our insurance provider. Quote valid for 30 days from Exhibit A date above.

The Payroll Burden is a percentage of wages representing the total combined cost of FICA, FUTA, SUTA, Workers' Comp. and Admin. After an employee in a given state reaches their SUTA/FUTA wage limit, the Payroll Burden after SUTA/FUTA Limit applies. Workers' Comp rates for overtime are calculated by dividing the WC Rate above by 1.5 (or your specific company's overtime wage multiplier) reducing your payroll burden for OT wages. There is no Workers' Comp charged on tip wages (also resulting in a lower payroll burden than shown above)

Signature: _____ **Date:** _____

This Exhibit A is a part of your Client Service Agreement and shall be incorporated by reference therein. Your intention to enter into a Client Service Agreement with FrankCrum is evidenced by signing above.

SERVICES INCLUDED

At FrankCrum, our highest priority is client satisfaction. Our employees are dedicated to providing you and your staff with the highest level of customer service. The following is an outline of services included in the administration fee that FrankCrum performs on your behalf.

WORKERS' COMPENSATION

- Issue workers' compensation certificates
- File statutory Workers' Compensation Notice of Injury report
- Direct medical treatment
- Prepare and submit year-end OSHA 300 reports
- 24-hour reporting of catastrophic and/or death claims to OSHA
- Access to workers' compensation posters
- Prepare loss runs
- Provide panel physicians where required by state law
- Conduct loss control surveys
- Review and handle workers' compensation claims

PAYROLL

- Process payroll, including job cost and multiple departments
- Handle OCIP, CCIP, and MCIP job-costing
- Prepare certified payrolls
- Print and prepare paychecks and direct deposit vouchers
- Maintain employee and client records
- Set up and maintain online payroll systems and interface for clients
- Issue year-end W-2 forms for employees
- Access to HRIS portal for instant payroll reports and data

UNEMPLOYMENT

- Handle state unemployment tax filings for employees
- Manage unemployment claims
- Attend unemployment hearings with clients by phone
- Process unemployment verification inquiries for employees

BENEFITS

- Administer FrankCrum-sponsored group medical plans, as well as client-sponsored major medical plans*
- Administer FrankCrum-sponsored group dental and vision plans
- Administer FrankCrum-sponsored 401(k) and retirement plans
- Administer tax-saving programs like FSA and HSA
- Handle COBRA compliance and administration for participants in FrankCrum group health programs
- Remit carrier premiums for clients participating in FrankCrum-sponsored plans and client-sponsored plans*

*When FrankCrum is the Agent of Record

ACCOUNTING

- Handle applicable wage garnishments and payments to appropriate agencies
- File consolidated 940s and 941s for all leased employees
- Provide documentation regarding the PEO relationship and tax payments

UNDERWRITING

- Conduct annual rate reviews
- Set up client payroll for additional locations
- Secure workers' compensation coverage for leased employees
- Assist with determination of workers' compensation classifications
- Add workers' compensation codes for leased employees

OPTIONAL SERVICES

PAYROLL

Stop payment / reversal	$35
Reverse direct deposit	$35
E-Verify	Priced upon request
Verify check status	$6 or $14 if check is greater than 90 days
Copy of cashed check	$10 or $14 if check is greater than 90 days
Garnishments	Charged to employee per work in states guidelines
Early check cashing fee	$1.25 per occurrence
Same-day direct deposit file	Starting at $35
Void & Reissue Fee	Starting at $50

WORKERS' COMPENSATION

Loss runs	1 FREE per year then $30 per subsequent request within the year
Waiver of subrogation	$300
Blanket waiver	Priced upon request
Alternate employers' endorsement	$500

BILLING

Additional deliveries	Cost of overnight
Additional locations	Cost of overnight
48-hour letter for non-payment (second letter)	$200

ADMINISTRATION FEES

Criminal background check (continental U.S.)	$25
Ten-panel drug test (if taken at a Quest Lab)	$46
Motor vehicle report	Prices vary by state
Employment tax credit services	15% of the dollar amount of the tax credit

BENEFITS

Benefits Administration Fee	No charge for client sponsored plans through self-service in MyFrankCrum. $50/month if client elects for FrankCrum to manage deductions for client sponsored plan(s).
1094/1095 processing (plus postage)	$2,000 per year for first FEIN; $200 each additional FEIN
401(k) establishment fee	Prices vary
401(k) transfer fee	$350 + $3/balance to Slavic; $500 max
401(k) annual fee	Employer maximum of $200/year reduces to $0 with 8 or more employees participating (employees pay a $7 quarterly fee)

MISCELLANEOUS

FrankCrum TrainingHub	$4.00 and up per user, plus setup fee
JazzHR applicant tracking subscription	Priced upon request
AmTrust Cyber Liability Insurance	$7.00 per tax ID per week
UKG Time & Attendance Software	$3.25 and up per user, plus setup fee. $49 monthly minimum.
IT customization fee	$120 per hour
Custom onboarding forms	$295 per year



AN AFFORDABLE ENTERPRISE CYBER LIABILITY PROGRAM

You may assume that cyber criminals only go after large corporations, but here are the facts:

43% of cyber attacks target small businesses, and numbers are on the rise.

60% of small businesses that are victims of cyber attacks go out of business within 6 months.

That's why FrankCrum has partnered with AmTrust Financial, an AM Best "A-" rated insurance carrier, to offer Enterprise Cyber Liability Insurance to help you protect your business.

AmTrust FINANCIAL

WHY IS CYBER LIABILITY COVERAGE IMPORTANT?

Your company is at risk. Even with a comprehensive cybersecurity program, risks are increasing as criminals find new ways to exploit company technology.

Your business is liable. Businesses are liable for their company and customers' online data regardless of where it's stored.

Cyber incidents can be costly. The cost of a cyber incident – especially litigation defense – can quickly devastate a business. For example,

- Before his termination, an employee stole personal account details the business held on its clients and sold them online. When the scheme was revealed, the clients sued the business for invasion of privacy and remediation. Total settlement and defense costs exceeded $200,000!
- A hacker gained access to a contractor's phone and email account and stole her clients' credit card information. In addition to the cost of breach notification, clients filed suit against the contractor. The total cost of the incident was $150,000.

WE'VE GOT YOU COVERED

The Cyber Liability Program offers a specialty policy that protects your company from first and third-party risks that arise from using technology.

Program Advantages:

- Lots of coverage ($250,000 liability limit) for a low price (currently $7.00 per week)!
- All FrankCrum clients are eligible regardless of cyber claims history or revenue with no underwriting or application process.
- $1,000 client retention per claim.
- Online access to certs, policy, and claims information.
- Policy written directly in your company name.

Types of Risks Covered:

- Privacy: Loss of client credit cards, personally identifiable information, protected health information
- Data: Corruption or destruction of data on a computer system
- Network Security: Denial or disruption of service due to ransomware and malware
- Human Error: When a hacker pretends to be a trusted contact and entices a victim to take an action that undermines cybersecurity

WORK SMARTER WITH OUR TIMEKEEPING SOLUTION

Accurate time tracking is tough—especially when employees are on the go or working at different sites—which can snowball into budgeting, planning, and billing errors.

If you're using timesheets or a manual process for timekeeping, you're working harder than you should to navigate these challenges. And even if you have a time and attendance system in place, integration with our payroll system, MyFrankCrum, could benefit you greatly.

We're excited to offer you our timekeeping solution powered by UKG (formerly Kronos). Here are a few game-changing features:

INCREASE PUNCH ACCURACY WITH GEOFENCING

With geofencing, you can pre-set a location and restrict employees from punching in/out when they exceed its radius. This ensures that employees are accurately paid for their time on-site and helps curb time fraud.

MAINTAIN PROFITABILITY WITH JOB COSTING

UKG allows team members to toggle between job details as they track time, allocating labor costs by project, job, task type, and more. Accurate and timely cost attribution makes on-demand reporting possible and profitability easier to maintain.

ACCESS FROM ANYWHERE

Gone are the days of punching a physical time clock. Employees can use the UKG mobile app to record and manage time. Punches are even recorded when WIFI connectivity isn't readily available.

MYFRANKCRUM INTEGRATION

Importing timekeeping data into MyFrankCrum for payroll processing is easy with our UKG integration. Plus, when added to MyFrankCrum, your new hires will be auto replicated in UKG for a seamless setup.



FrankCrum STAFFING

RECRUITING & STAFFING SERVICES

HELPING HIRING MANAGERS RECRUIT TOP TALENT

FrankCrum Staffing is the integrated recruiting arm of the FrankCrum family of companies. We consult with employers to understand their business needs and recruit top talent for them. We build long-term, productive relationships so when a staffing need arises, we can provide a complete solution and culture fit. Our fee structure is based solely on actual placements.





COMPREHENSIVE SERVICES

- Consult to customize recruiting services to meet your hiring needs
- Advise hiring managers about the job, market-rate pay, and salary range
- Help with job descriptions
- Provide extensive search, review, and screening process
- Conduct a face-to-face interview with each candidate before a client interview
- Offer benefits to contract and contract-to-hire employees

COMPETENCIES

- Administrative and call center
- Executive and professional services
- Light industrial and manufacturing
- High volume
- Seasonal hiring
- Rapid ramp-up
- On-site management
- Performance-based pay
- Incentive-based pay
- Staffing project management

PROCESSES AND RESOURCES

- Recruiters and team members who are certified pros
- Best-in-class technology, recruiting platforms, and proven processes
- Market and salary research capabilities
- Extensive training resources
- Tests using the eSkill platform equipped with validated assessments to effectively measure candidate readiness
- Identity verification and background checks for candidates using eScreen



HIRING IS HARD. MAKE IT EASIER WITH JAZZHR.

JazzHR is a powerful, affordable, user-friendly recruiting solution that integrates with MyFrankCrum.

As an award-winning applicant tracking system, JazzHR helps teams collaborate better during the recruitment process and provides automation to improve hiring efficiency and create the perfect candidate experience.

JazzHR helps businesses **cut time to hire by 50% and increase job traffic by 500%.**

KEY FUNCTIONALITY:

- One-click posting to 25+ candidate sources
- Job review to ensure maximum visibility of free job boards
- Customizable career page
- Candidate texting
- Robust candidate search
- Knockout questions to filter your pipeline to the best candidates
- Candidate self-scheduling

JAZZHR+MYFRANKCRUM

The seamless integration ensures the instant and accurate transition of candidate data from JazzHR to MyFrankCrum at the point of hire, saving clients time while eliminating manual entry and errors.

FrankCrum TrainingHub

Companies that lack a solid training program are at greater risk for lawsuits and fines, and typically suffer lackluster business performance compared to those that prioritize employee development. By contrast, a trained workforce leads to:

- Better compliance outcomes
- Faster processes
- Higher customer satisfaction
- Greater productivity
- Safer work practices
- Better business performance

At FrankCrum, our goal is to help you become the best employer you can be. That's why we developed FrankCrum TrainingHub, our learning management system (LMS) offering.

FrankCrum TrainingHub enables companies to offer customized training programs through an online platform. It frees administrators from manually tracking course completions and following up with managers and employees. And it addresses concerns about whether teams are fully compliant with training regulations.

FrankCrum clients receive unmatched pricing on the two package options below.

TRAININGHUB PREMIUM PACKAGE INCLUDES:

- Training tailored to your business, curated from an extensive catalog with thousands of courses
- Access to professionally created training courses in categories that include:
  - Compliance
  - Business
  - Leadership Skills
  - Office Safety
  - Customer Service
  - Sales
  - Industry-Specific Training
  - And More!
- Include your own customized training content to be uploaded by FrankCrum
- Unlimited consultations with FrankCrum's Human Resources Consultant
- FrankCrum support includes:
  - Adding new users
  - Removing terminated users
  - Managing content

TRAININGHUB BASIC PACKAGE INCLUDES:

- Access to ten preselected, professionally created training courses in categories that include compliance, business, leadership skills, and office safety
- Include your own customized training content to be uploaded by FrankCrum
- FrankCrum support includes:
  - Adding new users
  - Removing terminated users
  - Managing content

SUMMARY



WHAT OTHER BUSINESS LEADERS HAVE TO SAY

"I appreciate having FrankCrum as an HR giant standing behind me and ready to take over at a moment's notice, should something unfortunate happen."

– JASON AVERY
AVERY HOME REMODELING



"Everything from W-2s that you don't have to worry about to the compliance issues with the state that you don't have to worry about – all those things are handled by FrankCrum. It's like a weight off of your shoulders. You don't have to worry about that."

– JOHN PETERS, STANLEY STEEMER



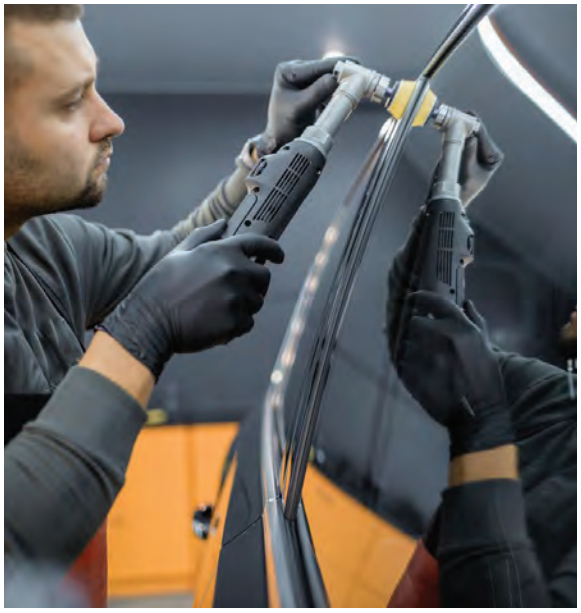
WATCH THE VIDEOS

CASE STUDY

GLASS DOCTOR

BACKGROUND

Established in 1962 with one shop in Seattle, Washington, today Glass Doctor offers complete glass repair, replacement, and services to the residential, automotive, and commercial markets in more than 270 locations in the U.S. and Canada. The company is part of the Dwyer Group, an international franchisor of service industry companies. Frank Klavon has owned the Glass Doctor of Broward County franchise since 2004 after serving as division manager for Safelite.



BUSINESS CHALLENGE

After working with another payroll provider for several years in a relationship he considered difficult and unresponsive, Klavon decided to make a change. He also realized that the time he was spending on the business had kept him from paying attention to the rising costs of his workers' compensation. Specific issues included:

- With 12 employees in the field serving clients, Glass Doctor of Broward wanted an easier and more efficient way to handle payroll and payroll reporting
- On-the-job injuries and their impact on workers' compensation costs were a growing concern

SOLUTION

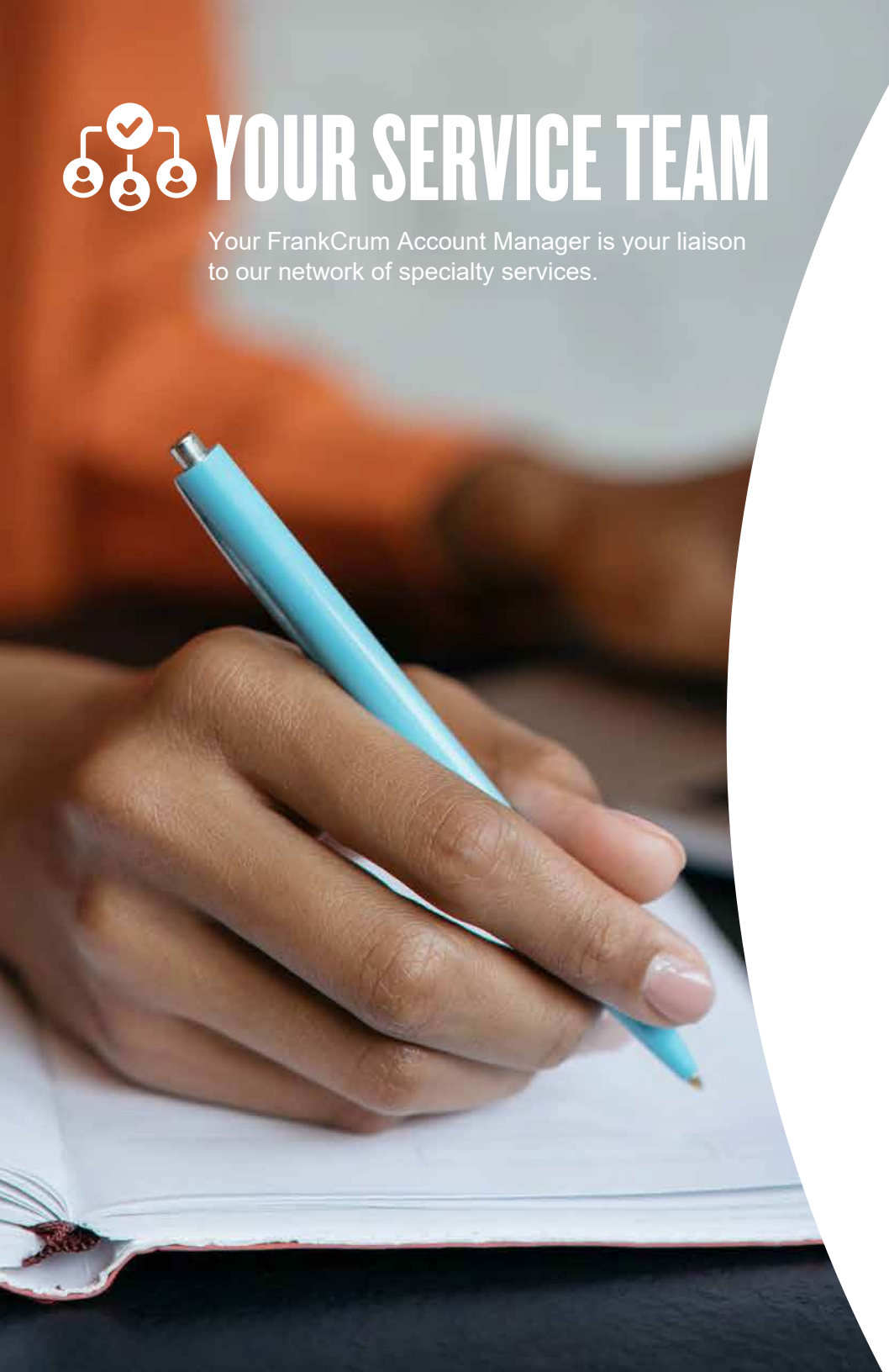
Glass Doctor of Broward selected FrankCrum as its PEO to provide services such as:

- Managing employee onboarding and working with Glass Doctor to ensure that all forms and information are submitted
- Online onboarding tools to make adding new hires much easier for Glass Doctor and its employees
- Payroll – done quickly and efficiently
- A specialist to handle government reporting and forms
- Workers' compensation coverage

RESULTS

Glass Doctor of Broward has worked with FrankCrum for more than five years in what Klavon considers a very successful relationship, commenting specifically on how much he enjoys working with FrankCrum's people. FrankCrum also provides these advantages:

- Saves Glass Doctor money on workers' compensation coverage with the flexibility of weekly premium payments, which frees up cash
- Payroll staff who are efficient and easy to work with
- Klavon is in the customer service business himself and appreciates the ease of working with FrankCrum



YOUR SERVICE TEAM

Your FrankCrum Account Manager is your liaison to our network of specialty services.

CLIENT EXPERIENCE

We support the long-term success of our clients. Your dedicated Account Manager will ensure you have the best possible experience with FrankCrum, including ongoing access to services based on your changing needs.

PAYROLL

Your Payroll Specialist will oversee the processing of your payroll every pay cycle and help you maintain compliance with federal and state regulations.

HR

We provide resources and experienced HR consultants who are at your disposal immediately to give you “FrankAdvice” on a wide range of HR issues.

BENEFITS

We guarantee a smooth transition from your current benefits program to the options you elect, and we become your plan administrator.

RISK MANAGEMENT

We provide resources for risk management, and also manage your workers' compensation claims.



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IMPLEMENTATION PROCESS OVERVIEW

We are looking forward to quickly getting you started as a new PEO client. With years of experience, we've had a lot of practice efficiently and accurately onboarding new customers like you.

We will guide you through a structured yet flexible process to set up your company in our HRIS system, MyFrankCrum, according to the roles in your organization.

Once you are ready to enroll, your Sales Representative will engage our Client Enrollment team to gather contractual documents and process your account activation.

WHAT HAPPENS AFTER ACCOUNT ACTIVATION?

Once your account is activated (typically within 1-2 business days), you will be introduced to your dedicated Payroll Implementation Specialist and your Account Manager.

YOUR PAYROLL IMPLEMENTATION SPECIALIST

Your dedicated Payroll Implementation Specialist assists in preparing and running your first payroll(s), including:

- Roles for your administrators
- Onboarding your employees
- Training on the MyFrankCrum portal
- Earning and deduction code setup
- Payroll submission setup
- PTO accruals
- First payroll processing and auditing

YOUR ACCOUNT MANAGER

Your dedicated Account Manager provides ongoing client support and assists with the full range of FrankCrum services, such as:

- Workers' Compensation Certificates of Insurance
- Workers' Compensation code and state additions
- Benefits products and services
- Claims support (workers' compensation, unemployment, EPLI)
- Discounted background checks and drug testing
- HR support through FrankAdvice



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WE LOOK FORWARD TO HELPING YOUR BUSINESS SUCCEED!

IF YOU ARE READY TO PROCEED WITH OUR PROFESSIONAL EMPLOYER SERVICES OR HAVE QUESTIONS, PLEASE CONTACT YOUR FRANKCRUM REPRESENTATIVE. WE ARE HERE TO ASSIST YOU.

877-695-6207
100 SOUTH MISSOURI AVE.,
CLEARWATER, FL 33756

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Plan and Rate Comparison for Park Boulevard

Policy Period: 11/01/2026-10/31/2027

Quoted rates expire on 01/12/2027
10/14/26 ; quote ID 100789_129825

In Network ($ Copay or % Coinsurance)	Current United Healthcare EY7R w/570 PPO	Proposed Florida Blue BlueOptions 05770 Florida	Current United Healthcare EY7R w/570 PPO_CBR	Proposed Florida Blue BlueOptions 05770 Florida	Current NHP/UHC EY36 w/NH21 NHP HMO	Proposed Florida Blue BlueCare 52 Florida	Current NHP/UHC EYZJ w/NH21 NHP HMO HSA	Proposed Florida Blue BlueCare HDHP 124/125 Florida
Deductible (Individual/Family)	$1,000 / $2,000	$1,000 / $3,000	$1,000 / $2,000	$1,000 / $3,000	$2,000 / $6,000	$1,500 / $3,000	$2,000 / $4,000	$2,500 / $5,000
Coinsurance	20%	20%	20%	20%	20%	30%	20%	10%
Out-of-Pocket Max (Individual/Family)	$6,000 / $12,000	$3,500 / $7,000	$6,000 / $12,000	$3,500 / $7,000	$7,000 / $14,000	$6,350 / $12,700	$4,000 / $8,000	$5,000 / $10,000
Primary Care	$25 (DW)	$25 (DW)	$25 (DW)	$25 (DW)	$30 (DW)	$40 (DW)	20% (AD)	10% (AD)
Specialist	$50 (DW)	$45 (DW)	$50 (DW)	$45 (DW)	$60 (DW)	$65 (DW)	20% (AD)	10% (AD)
IP Hospital - 3 day admit	20% (AD)	20% (AD)	20% (AD)	20% (AD)	20% (AD)	30% (AD)	20% (AD)	10% (AD)
Surgical - OP Hosp	20% (AD)	20% (AD)	20% (AD)	20% (AD)	20% (AD)	30% (AD)	20% (AD)	10% (AD)
Emergency Room	$400 (DW)	$200 (DW)	$400 (DW)	$200 (DW)	$400 (DW)	$300 (DW)	20% (AD)	10% (AD)
Urgent Care	$50 (DW)	$50 (DW)	$50 (DW)	$50 (DW)	$75 (DW)	$85 (DW)	20% (AD)	10% (AD)
Lab Services	50% (DW)	0% (DW)	50% (DW)	0% (DW)	0% (DW)	0% (DW)	20% (AD)	10% (AD)
X-Ray Indiv. Facility	0% (DW)	$50 (DW)	0% (DW)	$50 (DW)	0% (DW)	$65 (DW)	20% (AD)	10% (AD)
Complex Medical Imaging	$750 (AD)	$200 (DW)	$750 (AD)	$200 (DW)	$350 / 40% (AD)	$200 (DW)	50% (AD)	10% (AD)
Additional Pharmacy Deductible	$0	$0	$0	$0	$0	$0	$0	$0
Tier 1 Pharmacy	$10	$10	$10	$10	$10	$10	$10 (APD)	$10 (APD)
Tier 2 Pharmacy	$35	$50	$35	$50	$35	$50	$35 (APD)	$50 (APD)
Tier 3 Pharmacy	70%	$80	70%	$80	$70	$80	$70 (APD)	$80 (APD)
Specialty Pharmacy Benefit Per Script	Unknown	20% (DW)	Unknown	20% (DW)	Unknown	20% (DW)	Unknown	20% (APD)
Out Of Network								
Deductible (Individual/Family)	$2,000 / $4,000	$3,000 / $6,000	$2,000 / $4,000	$3,000 / $6,000	N/A	N/A	N/A	N/A
Out-of-Pocket Max (Individual/Family)	$6,250 / $12,500	$7,000 / $14,000	$6,250 / $12,500	$7,000 / $14,000	N/A	N/A	N/A	N/A
Out-of-Network Coinsurance	30%	50%	30%	50%	N/A	N/A	N/A	N/A

Covered Employees and Rates	EY7R w/570 PPO		BlueOptions 05770		EY7R w/570 PPO_CBR		BlueOptions 05770		EY36 w/NH21 NHP HMO		BlueCare 52		EYZJ w/NH21 NHP HMO HSA		BlueCare HDHP 124/125	
Employee Only	12	$1,117.08	12	$903.27	0	$1,117.08	0	$903.27	6	$885.54	6	$787.95	20	$777.36	20	$672.29
Employee + Spouse	0	$2,095.65	0	$2,032.34	0	$2,095.65	0	$2,032.34	0	$1,661.28	0	$1,772.89	1	$1,458.33	1	$1,512.64
Employee + Child(ren)	1	$1,619.77	1	$1,716.20	0	$1,619.77	0	$1,716.20	0	$1,284.03	0	$1,497.11	3	$1,127.17	3	$1,277.35
Family	2	$2,746.93	2	$2,800.12	1	$2,746.93	1	$2,800.12	0	$2,177.57	0	$2,442.65	0	$1,911.55	0	$2,084.09
Total Monthly Enrollment/Premium	15	$20,518.59	15	$18,155.68	1	$2,746.93	1	$2,800.12	6	$5,313.24	6	$4,727.70	24	$20,387.04	24	$18,790.49
Annualized Premium		$246,223.08		$217,868.16		$32,963.16		$33,601.44		$63,758.88		$56,732.40		$244,644.48		$225,485.88
Difference Annually - $/%				$-28,354.92 / -11.52%				$638.28 / 1.94%				$-7,026.48 / -11.02%				$-19,158.60 / -7.83%

All Plans Combined	Current	Proposed
Total Premium for Year	$587,589.60	$533,687.88
Total Enrolled	46	46
Difference Annually - $/%		$-53,901.72 / -9.17%

Abbreviation Key: AD = After Deductible DW = Deductible Waived APD = After Plan Deductible ARxD = After Rx (Pharmacy) Deductible

Disclaimers and Notes:

- The benefit descriptions and plan summaries included are for illustrative purposes only. Specific plan availability, coverage rules and full plan details are contained in the Summary Plan Descriptions (SPD) and plan documents that govern each plan or program. Should a discrepancy exist between information contained in this proposal and the actual plan documents, the plan documents will govern.
- FrankCrum requires all prospective clients to provide accurate and complete member-level census information and current benefit-related documentation and relies upon the accuracy and completeness of this information to provide the included pricing for employee benefit services.
- Should FrankCrum determine, in its sole discretion, that such required information and documentation is incomplete, inaccurate or has materially changed either prior to contract execution or after commencing services, FrankCrum reserves the right to amend any provision in this proposal or rescind this proposal for services altogether.
- All pricing is inclusive of administrative plan costs and commissions as well as a $10,000 Term Life and AD&D benefit.
- Complete proposals are valid for 90 days from the quote date, subject to data and documentation requirements and provisions stated herein. Preliminary quotes expire in 15 days.
- In the event the actual enrollment varies by 10% from the quoted census, carriers have the right to recalculate their rates.
- Minimum 50% participation of all Eligible employees or minimum of 5 enrolled, whichever is greater.
- The employer should NOT cancel its current group insurance coverage before receiving final approval of coverage from underwriting.
- Plan selections are illustrative. Check PEO and carrier rules for guidance on plan eligibility by individual.