



OAK HILL CEMETERY BOARD

WEDNESDAY, SEPTEMBER 19, 2018 – 4:00 PM

LAKE GENEVA CITY HALL, CONFERENCE ROOM 2C

626 GENEVA ST, LAKE GENEVA

AGENDA

1. Meeting called to order
2. Roll Call
3. Comments from the public as allowed by Wis. Stats. §19.84(2), limited to items on this agenda, except for public hearing items. Comments will be limited to 5 minutes
4. Approval of Cemetery Board Minutes from May 15, 2018 and August 21, 2018
5. Discussion/Recommendation on software program for Oak Hill Cemetery
6. Discussion/Recommendation regarding replacement of Oak Hill Cemetery Office Furnace
7. Update on Cemetery Perpetual Care Fund Investments
8. Date and Agenda items for next meeting
9. Adjournment

*This is a meeting of the Cemetery Commission.
No official City Council action will be taken; however, a quorum of the City Council may be present.*

9/17/2018 1:00 pm

cc: Cemetery Commissioners, Aldermen, Mayor, Administrator, Attorney, Department Heads, Media



OAK HILL CEMETERY BOARD
TUESDAY, MAY 15, 2018 – 4:00 PM
LAKE GENEVA CITY HALL, CONFERENCE ROOM 2C
626 GENEVA ST, LAKE GENEVA
MINUTES

1. Meeting was called to order by Chairman Read at 4:00pm
2. **Roll Call:** Present-Clarence Read, Maureen Allenstein, Coryn Commare, Arleen Krohn, Alderman Howell, City Administrator Oborn
3. **Comments from the public as allowed by Wis. Stats. §19.84(2), limited to items on this agenda, except for public hearing items. Comments will be limited to 5 minutes:** None
4. **Discussion/Action on election of President.** Nomination of Clarence Read made by Howell/Krohn. Motion carried 5 to 0.
5. **Discussion/Action on election of Vice President.** Nomination of Maureen Allenstein made by Read/Krohn. Motion carried 5 to 0.
6. **Discussion/Action on election of Secretary.** Nomination of Coryn Commare made by Read/Krohn. Motion carried 5 to 0.
7. **Approve Cemetery Commission minutes from October 18, 2017.** Howell/Allenstein motion to approve. Motion carried 5 to 0.
8. **Discussion/Recommendation on Cemetery Financials.** No updates
9. **Update/Recommendation on software program for Oak Hill Cemetery.** City Administrator Oborn confirmed about 2/3 of the work on the project is complete with approximately \$40K invested. Expect the project to be complete within the next 5 months.
10. **Discussion/Recommendation on Cemetery Equipment.** New lawn mower and truck box have been purchased.

11. Discussion/Recommendation on Cemetery Maintenance. No updates

12. Discussion/Action/Recommendation Walks at Oak Hill Cemetery. No updates.
Commare to follow up with Jim Davis to determine is Museum has any plans for Cemetery walk.

13. Date and Agenda items for next meeting. Next meeting will be August 21, 2018, 4:00pm at City Hall.

14. Adjournment. Howell/Krohn motion to adjourn at 4:23pm. Motion carried 5 to 0.

/s/Coryn Commare, Secretary



OAK HILL CEMETERY BOARD

TUESDAY, AUGUST 21, 2018 – 4:00 PM

LAKE GENEVA CITY HALL, CONFERENCE ROOM 2C

626 GENEVA ST, LAKE GENEVA

MINUTES

1. Meeting was called to order by Chairman Read at 4:00pm
2. **Roll Call:** Present-Clarence Read, Maureen Allenstein, Coryn Commare, Arleen Krohn, Alderman Howell, City Clerk Kropf, Comptroller Hall
3. **Comments from the public as allowed by Wis. Stats. §19.84(2), limited to items on this agenda, except for public hearing items. Comments will be limited to 5 minutes:** None
4. **Discussion/Recommendation on the Cemetery Fund.** Mr. Read raised the issue of fallen/overturned head stones and whether we could secure a budget to move/reset them. Mr. Read will speak with Mr. Earle, Public Works to determine cost/resource needs.
5. **Update/Recommendation on software program for Oak Hill Cemetery.** No updates. Comptroller Hall to provide project contacts to Ms. Commare. Ms. Commare agreed to follow up to get a project status update.
6. **Discussion/Recommendation on Cemetery Personnel.** Committee would like to give retiring cemetery manager a monetary gift for his service to Oak Hill. Alderman Howell will take this request to FLR and Personnel Committee on September 4th for review.
7. **Date and Agenda items for next meeting.** Next meeting will be September 10, 2018, 4:00pm at City Hall. Agenda items 4-6 will be discussed and the quarterly financial review by Comptroller Hall
8. **Adjournment.** Read/Howell motion to adjourn at 4:27pm. Motion carried 5 to 0.

/s/Coryn Commare, Secretary

Hi-

I ran into Clarence the other day and he asked me when the next meeting was. I told him the 18th and that I would not be available but would send my notes to you. Here is what I've been able to gather on the Cemetery project:

3 parties involved: Kapur, Pontem and Web Cemeteries.

Contact for Kapur is:

Bradley J. Thomann
GIS Specialist
KAPUR & ASSOCIATES, INC.
bthomann@kapurinc.com

Contact for Pontem is:

Karina (no other information provided yet)

Contact for Web Cemeteries is:

Nick Timpe
webCemeteries.com
800-653-7049 (o)
484-544-1311 (c)
Nick.timpe@webcemeteries.com

Kapur completed the GIS mapping and City has paid all invoices. Web Cemeteries has completed their work; they did all the paper records data entry. They issued a report in January 2018 that included items that needed checking. Blain signed off on the data review sheet. The City owes Web Cemeteries \$3,397.04; this is final payment of the contract. Pontem pending project update; however, both Kapur and Web Cemeteries stated the project is with Pontem.

I'm not sure why the Web Cemeteries invoice hasn't been paid. I believe it should be paid pending 1) confirmation from Pontem they have what they need to complete their work and 2) confirmation from Lance he is ok with data. My guess is if the data needs any modifications Web Cemeteries will charge us. I will continue to pursue Pontem. It would be good if Clarence could follow up with Lance to see if he reviewed the data report (it was provided on a flash drive -I'm trying to confirm if that was sent to Blaine). It's only as good as the data that has been entered (which I can't confirm it's been validated).

In the end, the City/Board need to decide to finish the project or stop. There needs to be some commitment to the project to get it done.

If you have questions, let me know.

Thanks,
Coryn



Final Data Entry Notes – *City of Lake Geneva*

Last Updated: January 3, 2018

Project Scope

- webCemeteries.com
 - Reference lot diagram cards linked to GIS map and enter deceased names into corresponding spaces and owner surnames utilizing the online mapping portal provided by Kapur & Associates.
 - Use data file provided by Pontem to link owner cards to Open Sections and enter the full names of the owners in the Open Sections.
 - Link interment ledger pages to the database records and enter burial dates for occupied spaces in the Open Sections
 - Fields entered:
 - Via Kapur & Associates Online Mapping Portal
 - Owner Surnames (when listed)
 - Deceased Names
 - Database File (provided by Pontem)
 - Owner Names - First, Middle and Last
 - Deceased Names - First, Middle and Last
 - Interment Numbers (if not already captured by Kapur & Associates)
 - Dates of Burial
 - *Entry of this information was done only for Open Sections of the Cemetery per the project scope.*
 - Provide Pontem with the completed data file along with the linked images for import into the software platform.

Skipped Records

- webCemeteries worked remotely to enter a total of 3,478 owner cards provided by the Cemetery; of these, 22.3% were skipped. Out of this set of skipped records, only 5.6% (or 1.2% of the complete record set) are records that were unable to be linked. The remaining skipped records were not linked either because they were duplicated records or the Cemetery requested that they not be linked. The categories of skipped records are as follows:
 - Missing Location (12) - Records did not provide a valid location within the cemetery to which they could be linked.
 - Blank Card (31) - Records that did not contain any text, writing, images or info and rendered them unable to be linked.
 - Removed (298) - Records that were already linked and are either duplicates are were duplicated due to a programming issue. These records do not require any additional follow-up by the cemetery.
 - For Cemetery (426) - Records comprised of letters, notes, instructions, receipts, etc that, per the Cemetery, should not be linked into the database.
- These cards may be accessed by the following link and webCemeteries.com will also provide these images on a thumb drive separated in folders by the Skip Categories listed above:
http://www.vastdataconcepts.com/dataentry/main/progress_Cemetery.aspx?Cem=346
- In addition to the Owner Cards, 296 interment ledger pages were linked to a total of 8,144 deceased.

Image Information

- The mapping work completed by Kapur & Associates included 2,137 lots of which 1,953 had associated lot diagram pages; there were a total of 1,836 lot diagram files provided. Section PF had very few lot diagram pages associated with it; per Kapur & Associates, the images linked to Section PF were all the images they were provided with for that Section. This correlates with the notes on the Cemetery Mapping Plan 2015 that says there are no section cards for this section.
- webCemeteries.com was provided with the following from A+ Graphics:
 - Owner Cards - 3,478 files
 - Interment Books - 296 files
 - Book 1 - 243 files
 - Book 2 - 101 files; the pages for Book 2 were merged into one image for a final file total of 53 files

Location Information

- The location structure used was defined by the mapping work completed by Kapur & Associates. The only locations created by webCemeteries.com were those for the Columbariums. The Columbariums were set up based on input from the Cemetery that there are four rows across and six rows down lettered A through F from top to bottom. These locations were created in the database as Block CE for Columbarium East, Block CN for Columbarium North, Block CS for Columbarium South and Block CW for Columbarium West.
- The following locations were not in the mapping interface
 - Section R, Lot 49 - Lot card is available and is blank
 - Section O, Lots 52, 106 and 107 - Lot card is available and is blank
 - Sections N, Lots 7 and 32
 - Lot card is available for Lot 7 and lists deceased
 - Lot card is available for Lot 32 and is blank

Owner Information

- Owner surnames were entered (if available and clear) in the mapping interface provided by Kapur & Associates. Owner surnames and ownership of graves were determined using the linked lot diagram.
- Owner surnames were updated to first, middle and last names once imported into the database using the owner cards; this applies only to those owners in the Open Sections as defined by the Cemetery Mapping Plan 2015.
- The database was searched to find the corresponding Section and Lot as listed on the owner cards and the ownership of graves within the lot was determined by correlating the owner surnames entered previously to the surname on the current owner card.
- All owner cards were linked in the database using the location listed on the card regardless of whether the section was Open or not.
- If an owner card indicated that ownership was transferred, the new owner was entered except in cases where internal interpretation was required. Any records that required internal interpretation were either discussed directly with the Cemetery or skipped for internal processing by the Cemetery.
- Any additional names listed on the owner card on the owner line were entered as co-owners. If no last name was listed for the additional owners, it was assumed they had the same last name as the owner, per the Cemetery.

Deceased Information

- Kapur & Associates completed the work of entering interment numbers into the spaces in the mapping interface to correlate with the location of the deceased within the lot.
- webCemeteries.com entered the deceased names into the mapping interface by correlating the interment number entered by Kapur & Associates to the interment number listed on the lot diagram.

- If a deceased on the lot diagram did not have an interment number or the interment number for a deceased was not found in the interface, the deceased was entered into an available grave within the lot and flagged for the next phase of data entry. These flagged deceased were later placed in a “Grave 99” in the database to indicate that their location within the lot is unclear.
- The project scope states that webCemeteries.com would link only the interment ledger pages to those deceased in the database that were in Open Sections; to provide a more complete final product, interment ledger pages have been linked to a deceased regardless of the section they were in.
- Deceased names in Open Sections were updated based on the interment ledger pages and dates of burial were entered. The interment ledger pages were only used to add to or correct deceased names; whichever document contained more information was the one that prevailed. The examples provided below are to demonstrate how the entry would have been handled.
 - Example 1:
 - Deceased Name entered from lot diagram - John Doe Smith
 - Deceased Name on interment ledger page - John Smith
 - Deceased Name entered as - John Doe Smith
 - Example 2:
 - Deceased Name entered from lot diagram - Jane S Doe
 - Deceased Name on interment ledger page - Jane Sally Doe
 - Deceased Name entered as - Jane Sally Doe
- There are deceased in the database that do not have an interment number entered and do not have an interment ledger page linked. These deceased were not able to be located on the interment ledger pages and were entered from the lot diagrams in the mapping interface.
- Interment ledger book 2 appears to have an interment numbering error starting on page 58. The interment numbers jump from 6550 to 6451 and continue on this way until the end of the book. The interment numbers were entered as they appeared in the book and were flagged as Duplicates. The affected numbers range from 6451 to 6550.
- There were deceased that appear to have multiple or conflicting locations listed. In these situations, the deceased was entered to the first location listed and has been flagged for Cemetery Review.
- webCemeteries.com will provide a list to the Cemetery of the deceased flagged as Duplicates and Cemetery Review.
- Deceased that were listed in the interment book pages as being removed to another cemetery can be found in the Removed section.
- Deceased that were listed in the interment book pages as being removed from one section to another section within the cemetery were moved to the new section.
- Deceased that did not have a location listed on the interment ledger page that correlated with a location in the database and had not been entered via the mapping interface can be found in the Holding section.

Data Entry Procedural Information

- Periods were not used. Example: “John M Smith”; “Rev Joseph Miller”
- Apostrophes were used. Example: “O’Hara”
- Spaces were entered. Example: “Van Buren”
- Alternate spellings were entered when indicated specifically on the record. Example: “Catherine or Katherine” if written as such on the record.
- Prefixes include “Dr”, “Rev”, “Heirs of”, “Child/Infant/Son//Daughter of”, etc. “Mr” or “Mrs” were not entered unless it is necessary information. Example: “Mrs John Smith” would include “Mrs” since her first name is not given.
- Abbreviations will be entered as written on the record, except the following instances:
 - “Wm” will be entered as “William”.
 - “Geo.” will be entered as “George”.

- “Chas.” will be entered as “Charles”.
 - “Jno.” will be entered as “John”.
 - “Jas.” will be entered as “James”.
 - “Thos.” will be entered as “Thomas”.
- If a person has a longer name (ie, John Jacob Smith Myers), the last name given is entered the Last Name field and the first name given is entered into the First Name field. All other names are entered into the Middle Name field. Example: First Name: “John”; Middle Name: “Jacob Smith”; Last Name: “Myers”.
- Maiden names or alternate names (ie, “Clara Isennegle (Clark)”) will be entered into the Middle Name field as entered on the card. Example: First Name: “Clara”; Middle Name: “(Clark)”; Last Name: “Myers”.
- Infants or children without a given first name (ie, “Infant Smith”) will be entered with “Infant” in the first name field.
- When dealing with poor legibility of a name, only the first letter of the name was entered.
- Dates of Interment or Date of Death was entered for this project if provided and depending on the card type. Any portions of the date that were not present were represented by zeroes; for example, 00/00/1924.

Vast Data Concepts, LLC

PO Box 14

Virginville, PA 19564

Date	Invoice #
2/5/2018	4382

Bill To
City of Lake Geneva Attn: Blaine Oborn 626 Geneva Street Lake Geneva, WI 53147

Due Date
3/7/2018

P.O. No.	Terms
	Net 30

Quantity	Description	Rate	Amount
1	Data Entry Project (Final 20% of Project Total) ***Please Make All Checks Payable To: Vast Data Concepts, LLC***	3,397.04	3,397.04

Please make all checks payable to "Vast Data Concepts, LLC" and include your invoice number.
Vast Data Concepts, LLC is d/b/a/ webCemeteries.com.

Total \$3,397.04



Data Analysis Review Checklist

City of Lake Geneva Cemetery

Submitted: January 3, 2018

Please Return by: January 18, 2018

This review sheet is valid for 10 business days. Fixing any data issues not reported within this time period will be the Client's responsibility. During the course of the project it has been the Client's responsibility to monitor the data entry review portal to identify out any systemic inconsistencies in data capture. The purpose of this review is not to newly identify systemic issues, but to provide a final comprehensive review. Correction of systemic issues that should have been identified during the project will be considered exceptions outside the scope of this project, and can be quoted separately.

Review and report any issues in the following categories:

1. *Fields Captured:* Verify that all of the following fields were captured, and that they are in the correct fields in the database.

Owner Names - First, middle and last names for Open Sections, surnames for all others

Deceased Names - First, middle and last names

Date of Burial - For deceased in Open Sections only

Interment Number - If not already captured in Phase 1 by Kapur & Associates

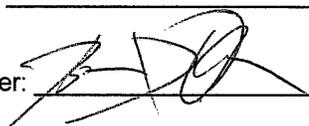
Cemetery notes to webCemeteries.com: _____

2. *Location structure:* The location structure used in the database was predetermined via the mapping work done by Kapur & Associates. The only new locations webCemeteries.com created were the Columbariums which had not been mapped by Kapur & Associates. Any notes below in reference to location structure should relate only to the Columbariums; questions about any other locations should be directed to Kapur & Associates.

Cemetery notes to webCemeteries.com: _____

3. *Images:* Please verify that the image has been linked correctly.

Cemetery notes to webCemeteries.com: _____

Reviewer:  Signature: Blaine Oborn Date: 1-19-18

By signing this form, I accept the condition of the data conversion records, except as may be otherwise noted in the notes sections above. I understand that webCemeteries.com is not responsible for fixing any errors, contradictions or inconsistencies with the original data set.



CONFIDENTIAL

24 April 2018

Prepared For:

City of Lake Geneva
Blaine Oborn
626 Geneva St
Lake Geneva, WI 53147
cityadmin@cityoflakegeneva.com
262-249-4098

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Exhibit B – Map Proofs for Client Delivered Geodatabase

Exhibit C – List of graves to be combined to lot

CONFIDENTIAL

24 April 2018

Prepared For:

City of Lake Geneva

Blaine Oborn

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Lake Geneva, WI 53147

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262-249-4098

Statement of Work

This Statement of Work (“SOW”) is entered into and effective as of 24 April 2018 set forth in [Exhibit A](#) hereto and is by and between Resource Information Associates, Inc. d.b.a. Pontem Software a Michigan corporation, having its principal place of business at 180 W. Michigan Avenue, suite 1100, Jackson, MI 49201 (“Pontem”) and City of Lake Geneva, with its principal place of business at 626 Geneva St. Lake Geneva, WI 53147 (“City of Lake Geneva”). Pontem shall provide the Client Services set forth herein (the “Work”) to City of Lake Geneva for the fees and other payment set forth herein and in the attachments hereto as it relates to Application Licensing, Data Conversion, and GIS Mapping needed to transition City of Lake Geneva’s cemetery administrative inventory management system to the Pontem Software platform.

1. [Solution Overview](#)

This SOW outlines an implementation of the Pontem Cemetery Management Platform to support City of Lake Geneva’s internal administrative needs as well as provide select self-service data to the public. City of Lake Geneva and Pontem Teams will deliver a best-in-class administrative experience for City of Lake Geneva staff. The overall solution leverages the experience of Pontem Software’s expertise acquired through more than 750 Data Manager installations, 100+ data conversion projects, 80+ GIS mapping projects, and 70+ online search site configurations. Pontem’s process focuses first and foremost on the integrity and overall quality of data, and is also designed to get the solution implemented within the stated time frame. In order to accomplish this, Pontem service projects require a well-defined and mutually agreed-to project scope prior to formal project kick-off; the prerequisites for this project include:

- Completed stakeholder and contact information Exhibit A
- Acknowledgement of City of Lake Geneva responsibilities Exhibit A
- Acknowledgement of data conversion details as described in Exhibit A
- Receipt of source data for conversion (any significant or substantive changes will result in a change request)
- Acknowledgement of map creation details as described in Exhibit A
- Receipt of complete source maps information (any significant or substantive changes greater than 5% will result in a change request)
- Completed installation questionnaire

The project timeline has been defined at 14 weeks from kickoff including specified interim milestones for all parties involved and set forth in Exhibit A hereto, assumes City of Lake Geneva products and services will be implemented as part of a single, continuous project, maintaining a dedicated implementation team throughout.

2. Project Objective and Philosophy

The objective for this project is to set City of Lake Geneva on a path toward realizing its goals and vision for a new cemetery records management platform, capable of supporting additional future expansion, as well as the option to leverage platform data via 3rd party vendor products while focusing on quality and integrity of data foremost; in summary, to create a best-in-class product presentation and best possible experience for City of Lake Geneva staff and visitors. Additional products and services can be subsequently developed by Pontem Software and City of Lake Geneva through a separate Client Services Engagement with Pontem Software to support other objectives. Pursuant to the above project objectives, City of Lake Geneva and Pontem Software will employ a highly collaborative approach guided by the following primary tenets:

- *Prescribed Functionality* – The functionality/scope for Data Conversion and Mapping will closely adhere to the predefined work scope outlined in Exhibit A
- *Quality Focus* – Maintaining the overall project/data quality will be prioritized above all other conflicting objectives. Project changes and discoveries (if any) that affect quality may also affect time/schedule unless offset by compromises in other areas in order to adhere to the original timeline.
- *Implementation Readiness* – The Pontem Software - specific portion of the project cycle will not start until any/all requisite readiness criteria (strategy, contract, organizational, project, content, and technical) have been met, and commitments to all interim project milestones can confidently be met.

3. Scope of Work

This SOW describes a single project/engagement from the perspective of City of Lake Geneva. However, it is recognized the Project as a whole is the sum of several interrelated and dependent sub-projects. These sub-projects are defined as follows:

3.1 Data Manager Application - Pontem will perform an installation of the Data Manager application on City of Lake Geneva's server, triggered for two (2) users, as well as configure client machines.

3.1.1 GIS Mapping Add-On - Pontem will trigger additional GIS Mapping add-on that will allow a real-time interaction of the data stored in the Data Manager with GIS Cemetery Maps.

3.1.1.1 Esri Arc Engine License - Pontem will configure two (2) Esri Arc Engine Desktop licenses. These licenses will be provided by City of Lake Geneva. An Esri license is required on each client workstation needing the ability to access the map integration between the Pontem Data Manager and the GIS maps used by the City of Lake Geneva.

3.2 Conversion of Legacy Data – Data to be converted from an excel file resulting from data entry services from a 3rd party

3. Fit and Finish for Customer Delivered GIS Maps – An Esri Geodatabase has been developed for the cemetery, but needs additional technician work to combine properties. The finished geodatabase will be integrated with the converted Excel data, and accessible via the Pontem Data Manager interface.

4. Project Approach and Assumptions

4.1. Summary of Schedule, Milestones, and Deliverables - The workflow, dependencies, and overall project schedule are outlined in the Sub-Project Plans and Milestone Schedule included with Exhibit A hereto.

4.2 Project Assumptions - Below is a list of the assumptions related to this SOW. If any one of the assumptions is missed or is proven to be inaccurate for any reason, Pontem reserves the right to present City of Lake Geneva, in accordance with the Change Control Provisions of this SOW, with a Change Order reflecting the impact on schedules, costs and/or deliverables caused by such missed or inaccurate assumption. Pontem will present City of Lake Geneva with the risks associated with the delay and describe the anticipated cost, timeline and/or deliverable impact that a missed or incorrect assumption directly causes. Pontem and City of Lake Geneva will work together to determine the best course of action. No action will be taken until a

mutually agreed upon decision is reached and documented.

4.2.1 Project Participation:

- i. Pontem and City of Lake Geneva will assign primary points of contact for each sub-project based on the expertise and skills required.
- ii. Pontem and City of Lake Geneva will ensure timely review and turnaround on open issues, actions and documents; and
- iii. Pontem and City of Lake Geneva recognize the tradeoffs, with regard to modifying the initial project scope. The parties will work with each other to prioritize requirements such that sub-project deliverables are achieved within the target timelines as outlined in Exhibit A.
- iv. Pontem and City of Lake Geneva recognize the timeline outlined herein is dependent on both parties' responsiveness and availability as it relates to collaborative steps of each sub-project.

4.2.2 Constraint of Scope:

Pontem and City of Lake Geneva recognize that during the project cycle, and despite all best efforts to constrain requirements, some changes to the requirements may be the most practical solution to meet City of Lake Geneva needs. Pontem and City of Lake Geneva will actively work together to resolve any conflicts in a mutually equitable way and documented in writing.

4.2.3 Assumption Details: Detail level assumptions for service sub-projects are outlined in Exhibit A.

5. Fees and Payment Schedule; Expenses; Change Control

5.1 Fees and Payment Schedule. The fees and payment schedule associated with this SOW are set forth in Exhibit A. The fees are based on the current understanding, project scope, project approach, and interim milestone schedule documented or referenced herein and in Exhibit A.

5.2 Expenses. While it is unlikely, should City of Lake Geneva require or request services to take place on-site, in addition to professional service fees, possible expenses for this project include travel expenses such as ground transportation, hotel and customary living expenses. All expenses will be approved in writing by City of Lake Geneva in advance, and will be invoiced monthly as incurred within a calendar month. Payment terms shall be as set forth in the Agreement.

5.3 Change Control & Change Requests. The scope and approach of all service projects, have been deliberately limited in order to achieve the target quality, timeline, and cost/price metrics. In order to maintain the goals for project, Change Control will be closely controlled and monitored. Pontem Software and City of Lake Geneva recognize that during the project cycle, and despite all best efforts to constrain scope as outlined within this SOW, some changes to the original project scope may be required. In the case where scope, effort or time must be expanded, Pontem Software and City of Lake Geneva will actively work together to find alternatives where scope, effort or time can be comparably removed from this project to achieve a net-zero impact to the overall timeline. To constrain costs, no additional requirements, functionality, or effort shall be added to the project scope without a written agreement ("Change Order") between City of Lake Geneva and Pontem Software. In the event a Change Order is required, the Change Order will reflect the impact to cost and the project schedule, and the fees. No Change Order shall affect the Subscription Commencement date set forth in Exhibit A to the Agreement unless specifically agreed to in writing by Pontem Software

5.3.1 Costs Due to Delay. Pontem Software reserves the right to withdraw and re-assign any Pontem Software provided personnel if (a) City of Lake Geneva or any third-party vendor (other than a Pontem Software subcontractor) cannot meet the required timeline for deliverables set forth in the Milestone Schedule, (b) Pontem Software has completed successful functional testing of the services set forth in this SOW, but User Acceptance Testing (UAT) is delayed for any reason not attributable to Pontem Software, or (c) the services are ready for delivery but City of Lake Geneva elects not to receive delivery at such time. If City of Lake Geneva requires more time to complete its collaborative responsibilities or UAT cycle, Pontem Software reserves the right to provide a Change Order to City of Lake Geneva for any additional effort and cost based on the time and materials rate structure outlined in Exhibit A. If a delay(s) is caused by Pontem Software in the project, City of Lake Geneva will not incur additional fees based on these delays.

6. Additional SOW terms

6.1 Work Location. The work will be primarily performed in Jackson, Michigan (Pontem Headquarters); Roseville, CA (Pontem Operations Office); and locally (City of Lake Geneva facility) as mutually deemed appropriate.

6.2 Subcontractors. Pontem Software may use subcontractors for some activities of this project. In those situations, Pontem Software is solely responsible for managing these subcontractors.

6.3 Primary Points of Contact. The primary points of contact related to this SOW and this project are set forth in Exhibit A.

7. Acceptance

IN WITNESS WHEREOF, the parties' authorized signatories have duly executed this SOW as of the SOW Effective Date.

PONTEM SOFTWARE

By:

Print Name: Karina Kimpell

Title: Vice President

Date: April 24, 2018

CITY OF LAKE GENEVA:

By:

Print Name:

Title:

Date:

Exhibit A - Project Plan for City of Lake Geneva

Prepared 24 April 2018 . Version 1

A. Primary Points of Contact for the Project:

Pontem Software Project Lead

Contact Name, Title:	Karina Kimpell, Vice President
Address:	180 W. Michigan Avenue Suite 1100
City, State, Zip:	Jackson, MI 49201
Telephone:	517.663.7139
Email:	karinak@pontem.com

Provide a dedicated Project Manager to be the primary point of contact to manage all City of Lake Geneva resources and deliverables, and City of Lake Geneva third parties. This resource will be the primary contact for milestone billings and issue escalations. All critical communications to sub-project resources will also be directed to the City of Lake Geneva's Project Manager. This resource is also responsible for approving and negotiating project change requests.

City of Lake Geneva Project Manager

Contact Name, Title:
Address:
City, State, Zip:
Telephone:
Email:

Please provide the name of the Billing Contact for this project engagement as well as ongoing annual maintenance billings if this is someone other than the Project Manager.

City of Lake Geneva Billing Contact

Contact Name, Title:
Billing Address:
City, State, Zip:
Telephone:
Email:

Please provide the contact information for an IT resource to be the primary point of contact at the City of Lake Geneva for all technical related requirements and activities. The technical resource must have knowledge or access to knowledge regarding City of Lake Geneva network and IT systems, including third party integrations.

City of Lake Geneva IT Resource

Contact Name, Title:
Telephone:
Email:
3 rd Party Company name (if applicable)

B. Project Cost Summary:

Cost Summary By Sub-Project				
	Qty	Rate	Cost	Annual SaaS
Data Manager with Integrated Imaging – 1 User	1	\$3000.00	\$3000.00	\$600.00
Integrated GIS Mapping Add-On License	1	\$2000.00	\$2000.00	\$400.00
Additional User Licenses	1	\$1000.00	\$1000.00	\$200.00
Data Conversion Services	1	\$3500.00	\$3500.00	-
GIS Map Services for Customer Provided GeoDatabase	1	\$3000.00	\$3000.00	-
GIS Map Services (Additional)	1	\$750.00	\$750.00	
3/2018 Change Request – Merge Burial Data from Geodatabase	1	\$750.00	\$750.00	
Project Total			\$14000.00	\$1200.00
Down Payment Applied			\$9250.00	

C. Payment Schedule

The project cost and plan as detailed in this document is a fixed-priced proposal based on an agreement accepted 2/13/2016 . The project cost to deliver license and SaaS products, and complete all services included, is \$13250.00 which will invoice with the following payment structure:

- 50% of Data Conversion Services, 40% of GIS Map Services, 100% Software License fees (Paid) \$9250.00 Paid
- 50% Data Conversion Sub-Project Delivery Milestone: \$2500.00
- 60% GIS Map Services Sub-Project Delivery Milestone: \$2250.00

Invoices will be e-mailed to City of Lake Geneva as milestones are achieved. All invoices are net 30 days.

D. Milestone Schedule/Timeline

The project will begin once this project plan is completed, approved and returned, and the required information has been supplied. An illustration of the timeline including client collaboration points is included as part of this exhibit.

Week 0	SOW Executed, completed and delivered to Pontem, first payment received. – Cues Project Kickoff.
Weeks 1-2	Prep Data Files, Begin GIS map Fit and Finish Services
Week 3	Data Converted , Application Installation, Real Time Updates Installed
Week 4	Data Conversion Review QA review with City of Lake Geneva.
Week 5	Converted Data Delivered. Map Proofs Delivered

Week 5-9	Map and Data Conversion Review Period.
Week 9	Data Conversion Approved, Onboarding Begins, Receive, Confirm, and Implement Map Edits
Week 9-12	Onboarding and Consulting Appointments at City of Lake Geneva's Convenience
Week 13	Deliver Integrated Maps
Week 14	Maps integrated with OBS. OBS URL Delivered

The project timeline has been defined at 14 weeks from kickoff through final approval including specified interim milestones for all parties involved and assumes City of Lake Geneva products and services will be implemented as part of a single, continuous project, maintaining a dedicated implementation team throughout.

E. Post-Project Support and Maintenance

Pontem Software will provide general usability support and product maintenance upgrades under the terms of Pontem Annual Maintenance subscription which will be assigned an effective date equal to first day of the month of the SOW approval.

F. City of Lake Geneva is Responsible for the Following:

1. Providing a dedicated Project Manager to be the primary point of contact to manage all City of Lake Geneva resources and deliverables, and City of Lake Geneva third parties. This resource will be the primary contact for milestone billings and issue escalations. All critical communications to sub-project resources will also be directed to the City of Lake Geneva's Project Manager. This resource is also responsible for approving and negotiating project change requests.
2. Providing an IT resource to be the primary point of contact at the City of Lake Geneva for all technical related requirements and activities. The technical resource must have knowledge or access to knowledge regarding City of Lake Geneva network and IT systems, including third party integrations.
3. Providing a resource to be the primary point of contact at City of Lake Geneva for all records keeping and data conversion/clean up questions. This resource must have knowledge or access to knowledge regarding City of Lake Geneva legacy data, and be authorized to determine how data will be leveraged for administrative purposes once the project is complete. This resource may also need to make collaborative decisions regarding Property Addresses with Map Resource.
4. Providing a resource to be the primary point of contact at City of Lake Geneva for all property layout and addressing questions. This resource must have knowledge or access to knowledge regarding City of Lake Geneva legacy maps. This resource may also need to make collaborative decisions regarding Property Addresses with Data Resource.
5. City of Lake Geneva must provide timely review and feedback on all project deliverables, milestones, questions and issues that arise during the project.

G. Project Plan – Data Conversion

City of Lake Geneva Data Resource

Contact Name, Title:

Telephone:

Email:

Please provide a point of contact for the Data Conversion portion of this project. All questions and approvals will be directed to this individual. Project Manager will be copied on all correspondence.

- When your data is delivered, Pontem staff will create access for City of Lake Geneva Staff. Please provide the names of the individuals who should be granted access to the database.

Name	Title	Email Address (username)	Security (Admin, General, Read Only)

Source File(s)

- Source File(s):
 - ESRI data file: to be extracted from the geodatabase provided by the City of Lake Geneva's 3rd party GIS contractor.
 - Containing Burial Data to be merged with the primary data file. (see issues and kickoff prerequisites section)
 - Data file provided by City of Lake Geneva's 3rd party Data Entry contractor: City of Lake Geneva Final Data Export - Rev 4.xlsx
- Updated File IS NOT to be retrieved at time of services. Pontem will use the data files supplied in early 2018 by the 3rd party contractors.

Field Mapping

Source Column Title	Pontem Field Mapping	Pontem Work	Client Notes and Kickoff Prerequisites
Deceased_Pre	Occupant Title		<p>PREREQUISITE QUESTION: Should Pontem move 'child of', 'daughter of', to first name? As it exist currently, it would convert as the occupant's "title"</p> <p>PREREQUISITE QUESTION: We need you to indicate if this is a field of data that should be extracted from the geodatabase and merged. Pontem will merge extracted data only if it does not already exist in the file provided from the data entry firm.</p>
Deceased_First	Occupant First Name	where blank, and a first name exists on the ESRI map, we will use the name from the ESRI map	<p>PREREQUISITE QUESTION: We need you to indicate if this is a field of data that should be extracted from the geodatabase and merged. Pontem will merge extracted data only if it does not already exist in the file provided from the data entry firm.</p>
Deceased_Middle	Occupant First Name	Middle name will be appended to the first name	<p>PREREQUISITE QUESTION: We need you to indicate if this is a field of data that should be extracted from the geodatabase and merged. Pontem will merge extracted data only if it does not already exist in the file provided from the data entry firm.</p>
Deceased_Last	Occupant Last Name	<p>'For Sale' 4,639 records</p> <ul style="list-style-type: none"> Will change to blank. The grave status will 'Available' for these records. <p>'empty' 6,690 records.</p> <ul style="list-style-type: none"> will change to blank The grave status will 'Sold' for these records <p>'unknown' 41 records.</p> <ul style="list-style-type: none"> will import as-is The grave status will be 'Occupied' for these records 	<p>PREREQUISITE QUESTION: We need you to indicate if this is a field of data that should be extracted from the geodatabase and merged. Pontem will merge extracted data only if it does not already exist in the file provided from the data entry firm.</p>

Deceased_Post	Occupant Suffix		<p>PREREQUISITE QUESTION:</p> <p>We need you to indicate if this is a field of data that should be extracted from the geodatabase and merged. Pontem will merge extracted data only if it does not already exist in the file provided from the data entry firm.</p>
Deceased_IntermentNum	Occupant Interment Number		<p>PREREQUISITE QUESTION:</p> <p>We need you to indicate if this is a field of data that should be extracted from the geodatabase and merged. Pontem will merge extracted data only if it does not already exist in the file provided from the data entry firm.</p>
IntermentDate	Occupant Date of Burial		<p>PREREQUISITE QUESTION:</p> <p>We need you to indicate if this is a field of data that should be extracted from the geodatabase and merged. Pontem will merge extracted data only if it does not already exist in the file provided from the data entry firm.</p>
Section	Grave Level 2 – “Section” for ground cemetery. “Block” for Columbarium		<p>PREREQUISITE QUESTION:</p> <p>The Columbaria data will be converted to a separate ‘cemetery’ contained within the Pontem database to allow for it to have an addressing schematic different than the ground cemetery. Please confirm this is an agreed upon approach.</p> <p>The Columbaria does not exist in the GeoDatabase delivered to Pontem by the 3rd party firm. There are 96 records in the data submitted for conversion that appear to be related to the columbaria</p> <ul style="list-style-type: none"> - Columbarium property address format is “Block-Columbarium-Lvl3-Grave”
Plot or Columbarium	Grave Level 3 – “Lot” for ground cemetery. “Columbarium” for Columbarium		<p>PREREQUISITE QUESTION:</p> <p>Level 3 of the grave address is labelled differently in the GIS map (which contains only data for the ground cemetery). Should this be titled “Lot” to match what is in the ESRI map?</p>

			<ul style="list-style-type: none"> - Cemetery property address format is “Section – Lot – Grave” (to match ESRI) <p>The Columbaria data will be converted to a separate ‘cemetery’ contained within the Pontem database to allow for it to have an addressing schematic different than the ground cemetery.</p> <p>The Columbaria does not exist in the GeoDatabase delivered to Pontem by the 3rd party firm. There are 96 records in the data submitted for conversion that appear to be related to the columbaria</p> <ul style="list-style-type: none"> - Columbarium property address format is “Block-Columbarium-Lvl3-Grave”
Lvl3	Grave Level 3 – “???” for Columbarium.		<p>PREREQUISITE QUESTION:</p> <p>Level 3 of the grave does not have a user-friendly name. Please indicate what you would like to call this segment of the Columbaria Grave address.</p> <p>No data exists in this field for the ground cemetery.</p>
Grave	Grave Level 5 – “Grave”		<p>CLIENT NOTE: There is one row with a value of “NULL” this record will have to be entered manually.</p>
Owner_Pre	Owner Title		
Owner_First	Owner First Name		
Owner_Middle	Owner First Name		
Owner_Last	Owner Last Name		
Owner_Post	Owner Suffix		
CoOwner_Pre	Owner Title	Co-owners will need to be extracted to their own row for the import.	
CoOwner_First	Owner First Name		
CoOwner_Middle	Owner First Name		
CoOwner_Last	Owner Last Name		
CoOwner_Post	Owner Suffix		

IntBook	Grave Image	All image file names are to be put into the images/documents grid for the associated grave record.	<p>PREREQUISITE QUESTION:</p> <p>It is assumed that all images will share the same folder, such as c:\images. Please provide the network path where your images are stored.</p> <p>All images will be located under that folder using the path and file name from the City of Lake Geneva Final Data Export - Rev 4.xlsx</p>
OwenerCard_1	Grave Image	All image file names are to be put into the images/documents grid for the associated grave record.	
OwnerCard_2	Grave Image	All image file names are to be put into the images/documents grid for the associated grave record.	
OwnerCard_3	Grave Image	All image file names are to be put into the images/documents grid for the associated grave record.	
OwnerCard_4	Grave Image	All image file names are to be put into the images/documents grid for the associated grave record.	
OwnerCard_5	Grave Image	All image file names are to be put into the images/documents grid for the associated grave record.	
OwnerCard_6	Grave Image	All image file names are to be put into the images/documents grid for the associated grave record.	
OwnerCard_7	Grave Image	All image file names are to be put into the images/documents grid for the associated grave record.	
OwnerCard_8	Grave Image	All image file names are to be put into the images/documents grid for the associated grave record.	
OwnerCard_9	Grave Image	All image file names are to be put into the images/documents grid for the associated grave record.	
OwnerCard_10	Grave Image	All image file names are to be put into the images/documents grid for the associated grave record.	

Data Conversion Delivery and Approval Procedures

When Pontem's internal QA of converted data is complete, Pontem will begin delivery and approval activities as follows:

1. Pontem will schedule a web meeting with City of Lake Geneva staff where the completed data will be demonstrated and reviewed from a sandbox installation on the Pontem Staff computer. The objective of this meeting is to confirm the data appears to be without error, and obtain approval from the City of Lake Geneva Project Manager to proceed with the scheduling of the actual installation.
2. Pontem will have an appointment with City of Lake Geneva's IT to install the converted data.
3. City of Lake Geneva staff will receive review training to understand how to evaluate the converted data.

30 Day Review Period

- Once review training has been completed, a 30day review period will commence.
- The objective of the review period is for City of Lake Geneva staff to confirm the work has been performed according to the scopes of work as defined in this project plan.
- Any discoveries of errors should be immediately reported in writing to Pontem via email. Error reports will be held, pending receipt of additional reports until the end of the review period, or until City of Lake Geneva staff indicate their review is complete, whichever is earlier.
 - Errors or inaccuracies in the content of the data which stem from errors in the source data are the responsibility of the client, and are typically addressed during post-conversion manual clean-up activities.
- If circumstances exist that prevent City of Lake Geneva from reviewing the delivered data within the 30 day review period, an extension of the review period may be formally requested by sending an email to Pontem Software Project Lead, Karina Kimpell at karinak@pontem.com for consideration. Extensions will be granted in 2 week to 1 month increments depending on the circumstance of the request.

Approval

- During the Data Conversion review period, data in the database should not be added, edited, or deleted. Making changes to the converted data constitutes an approval of the data.
- If corrections are needed Pontem will execute the corrections, demonstrate to City of Lake Geneva the corrections have been applied, and re-deliver. Approval to re-deliver corrected data constitutes approval and that portion of the engagement will be considered complete.
- City of Lake Geneva may approve the Data Conversion prior to the review period end. Approval must be indicated in writing via email.

H. Project Plan – GIS Map Creation

City of Lake Geneva Map Info Resource

Contact Name, Title:

Telephone:

Email:

Please provide a point of contact for the Mapping portion of this project. All questions and approvals will be directed to this individual. Project Manager will be copied on all correspondence.

Source Materials:

- Customer provided Esri GeoDatabase as defined in <https://support.pontem.com/hc/en-us/articles/203073714-Customer-Provided-Esri-Geo-database-Requirements-for-Use-with-Pontem-GIS-Mapping>
- OakHillCemeteryMappingPlan.pdf – This is a document supplied by the City of Lake Geneva in March 2016. It describes which properties should only be mapped to the lot level.

Scope of Work:

- .Pdf 'Proofs' of client delivered Geo Database
- Collaboration with client to advise and document needed refinements and/or corrections
- Pontem technician will merge graves into a single lot as described in the document OakHillCemeteryMappingPlan.pdf once the geodatabase from the 3rd party contractor has been confirmed as approved,
- Integration with Pontem database
- Installation, Setup
- Training will be provided upon delivery of map files on how to use the maps

Issues/Concerns

When integrating a geodatabase with an existing cemetery records database, whether that be a Pontem database, or data supplied for conversion to Pontem

Matching Map Data with Cemetery Records Data

When integrating a geodatabase with an existing cemetery records database, whether that be a Pontem database, or data supplied for conversion to Pontem, it is of primary importance the Property Addresses in the geodatabase match the property addresses in the cemetery records database (excel provided by data entry contractor) exactly. *Pontem STRONGLY recommends the cemetery staff compare the property address attribution in the geodatabase to the property addresses in the records database as a prerequisite to kickoff. As a courtesy, Pontem has provided 'proofs' exported from the geodatabase delivered by the mapping contractor, that the cemetery can use for the comparison project.*

- The integration process will find all property (grave) polygons whose addresses have a match in the records database and will link the two records together.
- The integration will create a new, empty record in the records database for every polygon whose address is not found in the records database.

- This implies that if your records database is incomplete and does not contain all property inventory, the mapping project will create records for all missing inventory. This is typically desired by most customers.
- Records that exist in the records database, whose addresses do not match the address of any polygon, will not be linked to the map, and will require manual cleanup/migration.
 - The City of Lake Geneva staff agree the map will become the authority for the property inventory, and plan to migrate any unmatched that occurs as a result if the integration to the proper property records post-integration.

Project Assumptions

Below is a list of the assumptions related to this project. If any one of the assumptions is missed or is proven to be inaccurate for any reason, Pontem reserves the right to present City of Lake Geneva with a Change Order reflecting the impact on schedules, costs and/or deliverables. Pontem will present City of Lake Geneva with the risks associated with the delay and describe the anticipated cost, timeline and/or deliverable impact that a missed or incorrect assumption directly causes. Pontem and City of Lake Geneva will work together to determine the best course of action. No action will be taken until a mutually agreed upon decision is reached.

- Geodatabase delivered to Pontem for integration has been reviewed and approved as accurate by the cemetery staff.
- Geodatabase is complete and requires no additional technician work except for the merging of grave polygons into lots as described in the above scope of work.
- Requests from the customer for modifications to the Geodatabase are outside the scope of this project and will be issued a change order.
- The property polygons and the address attribution applied to them is the authority for the property inventory. Customer assumes responsibility for adjusting any mismatched records in their Pontem Records Database (.fdb) to conform to the addressing on the map.
- It is assumed the City of Lake Geneva will acquire, install and configure the Esri ArcEngine License on the workstation that will have access to the map, before Pontem installation is scheduled.
- **IMPORTANT:** If post integrations changes are made to the geodatabase, a reintegration will be required. A second integration is outside the scope of this project and will be considered a separate engagement.

Delivery Procedures –GIS Mapping

When Pontem's integration of the customer-delivered geodatabase is complete, the functioning integration will be presented from a sandbox installation managed by Pontem. During this web meeting, Pontem will review the maps and seek approval to proceed with delivery to the City of Lake Geneva. As this work is simply for integrating a geodatabase prepared by the City's 3rd party contractor, it is assumed the map has already been approved. Post-installation training will be provided that will allow the City of Lake Geneva cemetery staff use the new maps.

I. Software Installation

Installation and Account Setup Information

The following administrative details must be completed and returned in order to proceed with scheduling of your installation.

Email Notifications:

Please provide the names, titles, emails, and phone numbers of ALL staff members who should receive emails related to program upgrades, and advisories.

Name	Title	Email Address	Phone Number

Where to install the software:

Unless otherwise instructed, Pontem will coordinate installation with the IT resource named in item I. Installation can occur on one or more computers. If there will be multiple computers/workstations receiving Pontem Cemetery, one PC acts as the MAIN program host and others access the database, custom reports, images, maps, etc. stored on the MAIN host. Please indicate which installation type will be true for you by checking the correct choice:

Server/Client Network Peer-to-Peer Network Stand-Alone PC

If Stand-Alone PC is NOT the option selected, how many computers, in addition to the MAIN PC/Server, need an installation? _____

The installation will not create the database. The database will be installed by the Professional Services Staff handling the Data Conversion Project.

Images:

Your Pontem Cemetery Data Manager comes with an Integrated Image and Document Manager module. Image files and scanned document files can be associated with property records. Any file type can be linked to the property records and opened by double-clicking the file name. However, if the files are JPG image files, they are also previewed in the workspace of the Cemetery program.

Electronic image and document files can be accessed by browsing to the current storage location on your network from within the Pontem workspace. Alternatively, they can be scanned into the workspace if your scanner is directly attached to the computer you are using.

Do you have a scanner Yes No If yes, is the scanner on a network or directly connected? _____

Maps:

Configuration and setup of the GIS Mapping add-on will be completed at the time of GIS Map Delivery.

J. Issues needing resolution as a prerequisite to kickoff

- When reviewing the data received from the 3rd party contractor, we did not specifically notice large amounts of missing occupant data as described by Blaine Osborne in March 2018. At that time, it was discussed the data omitted by the data entry contractor WAS present within the GeoDatabase. Pontem was asked to provide an estimate for extracting this data and merging it with the data supplied by the Data Entry Contractor. Please confirm this work is to be performed and specify which data elements are to be extracted from the GeoDatabase and merged with the primary data.
- Pontem's review found data for BOTH the ground cemetery and columbaria in the data. When cemeteries have different areas or features needing different addressing schematics, they are handled as two separate cemeteries within the Pontem database. We are seeking confirmation the cemetery staff understand how this is typically handled in Pontem and agree with the recommended approach.

If the cemetery staff are not in agreement with this approach, the 96 columbaria records will be excluded from the data conversion and will need to be manually entered as part of a post-conversion project.

- All Prerequisite questions presented specific to the data elements in the data conversion sections must be answered prior to kickoff.
- Pontem performed a review of the in-progress geodatabase in May 2017. At that time, several issues were noted and reviewed with Peg Pollit. The issues were as follows:

1. Pontem needs the City of Lake Geneva to identify lots to be mapped to the lot level. This info is needed before the data conversion can start and at the beginning of the GDB prep.

- This issue has been resolved. A document was provided to Pontem listing the properties to be mapped to the lot and The City of Lake Geneva has contracted with Pontem to make post-delivery modifications to the Geodatabase to merge grave polygons into single lots for roughly ½ of the cemetery
- However, this creates a secondary issue:
This will result in quite a number (roughly ½) of the graves in the records database not being connected with the map because the addresses used to initialize the link will not match.

The solution is to modify the data submitted to Pontem to remove the value in the grave column for any rows whose information is to be stored at the lot level as governed by a document supplied by the City of Lake Geneva in March 2016.

This is work that has not yet been completed, nor is it work that was contracted with Pontem. Pontem can provide an estimate and document a change request for providing this additional service to the City of Lake Geneva. Alternately, the City of Lake Geneva can perform this work and provide a revised file to Pontem prior to project kickoff. We will need the city's feedback on this issue to know how to proceed.

2. All graves with an Interment # of "GG" within a lot are to be combined into a single grave (grave 0). The data conversion will have to match. This will in some cases be superseded by #1.

- Pontem's review indicates this issue has been resolved. Review of the data delivered by the data entry contractor does not contain any graves with an interment # of "GG".

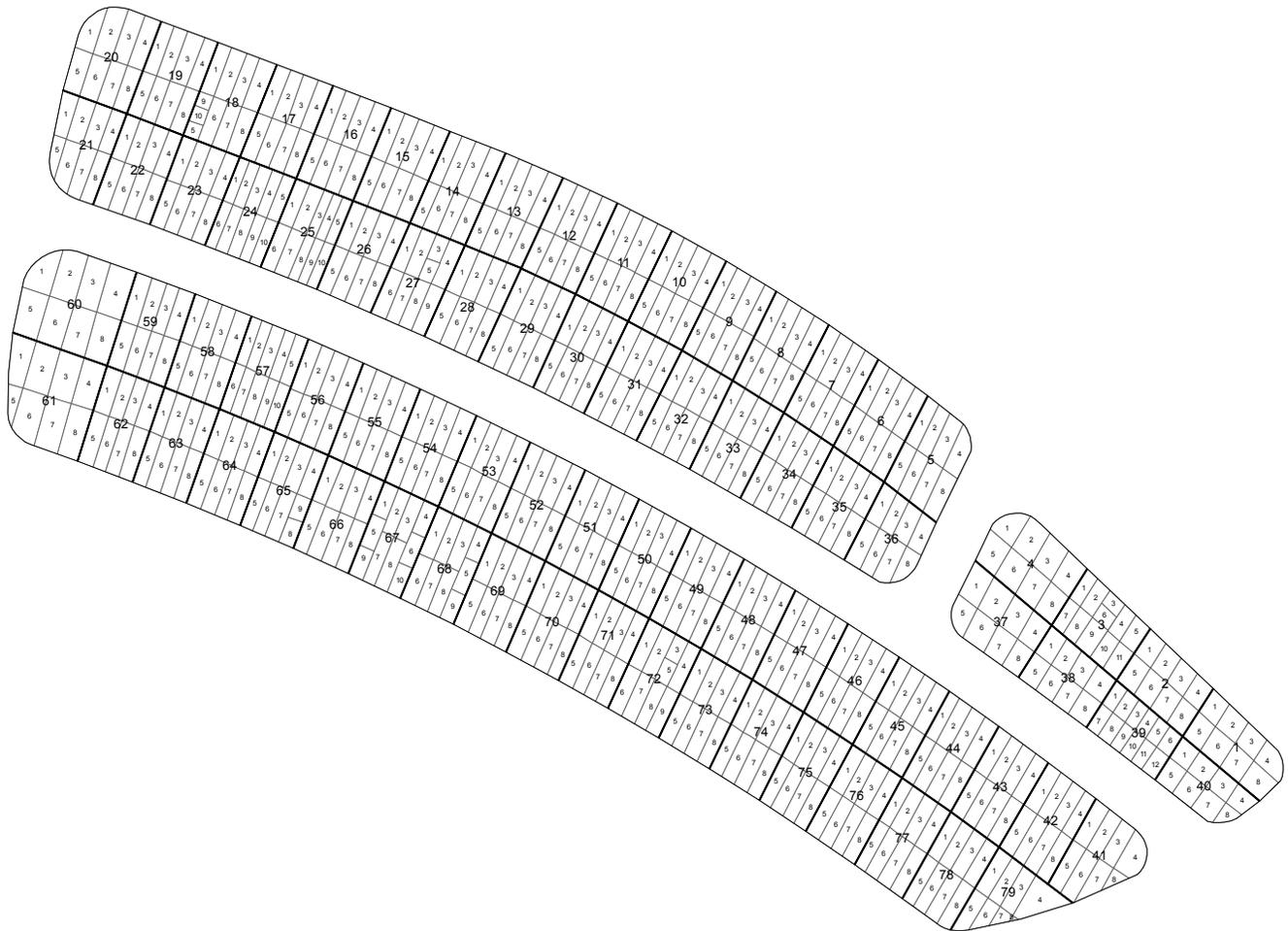
3. The GIS Contractor divided graves on the map into more, smaller graves whenever there was more than one burial to record. They assigned an arbitrary grave number. These divisions are not flagged. They are visible. We need to determine when and how to re-combine them before the data conversion starts. This may be superseded by #1.

- This issue may still be present. The City of Lake Geneva cemetery staff will need to carefully review the GIS maps to determine if any graves not already planned for merging to the lot level are impacted.
 - Any instances where a property has been divided into multiple properties to accommodate an additional burial will need to be identified on the map proofs and returned to Pontem for merging. Pontem can provide an estimate and document a change request for providing this additional service to the City of Lake Geneva. We will need the city's feedback on this issue to know how to proceed.
 - It follows also that the data for these affected properties will need to be edited in the data prior to data conversion. Pontem can provide an estimate and document a change request for providing this additional service to the City of Lake Geneva. Alternately, the City of Lake Geneva can perform this work and provide a revised file to Pontem prior to project kickoff. We will need the city's feedback on this issue to know how to proceed.

Section:A



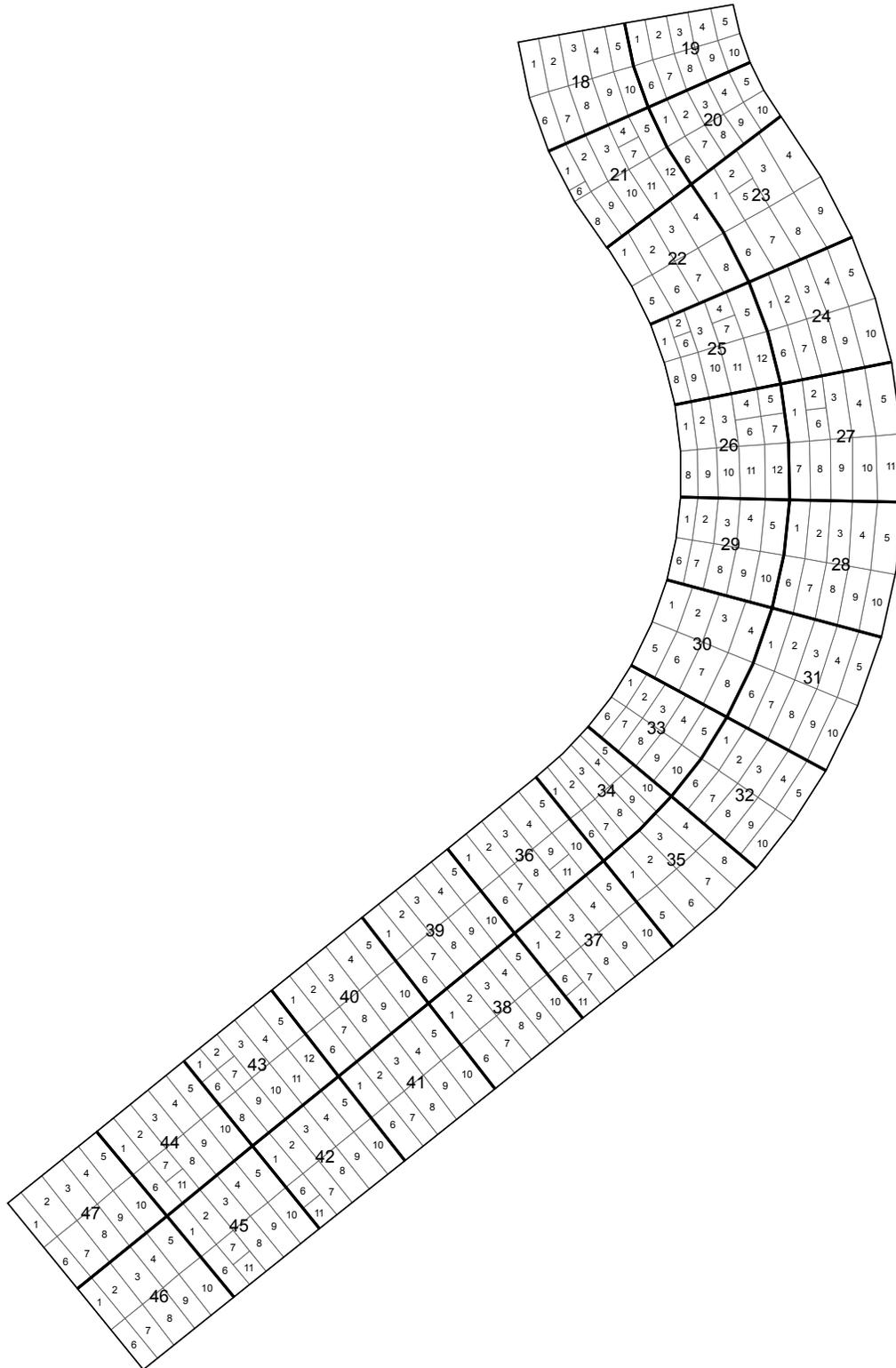
Pontem to combine graves to Lot Level



Oak Hill Cemetery
1101 Cemetery Rd
Lake Geneva, WI 53147

Maps prepared by Pontem Software

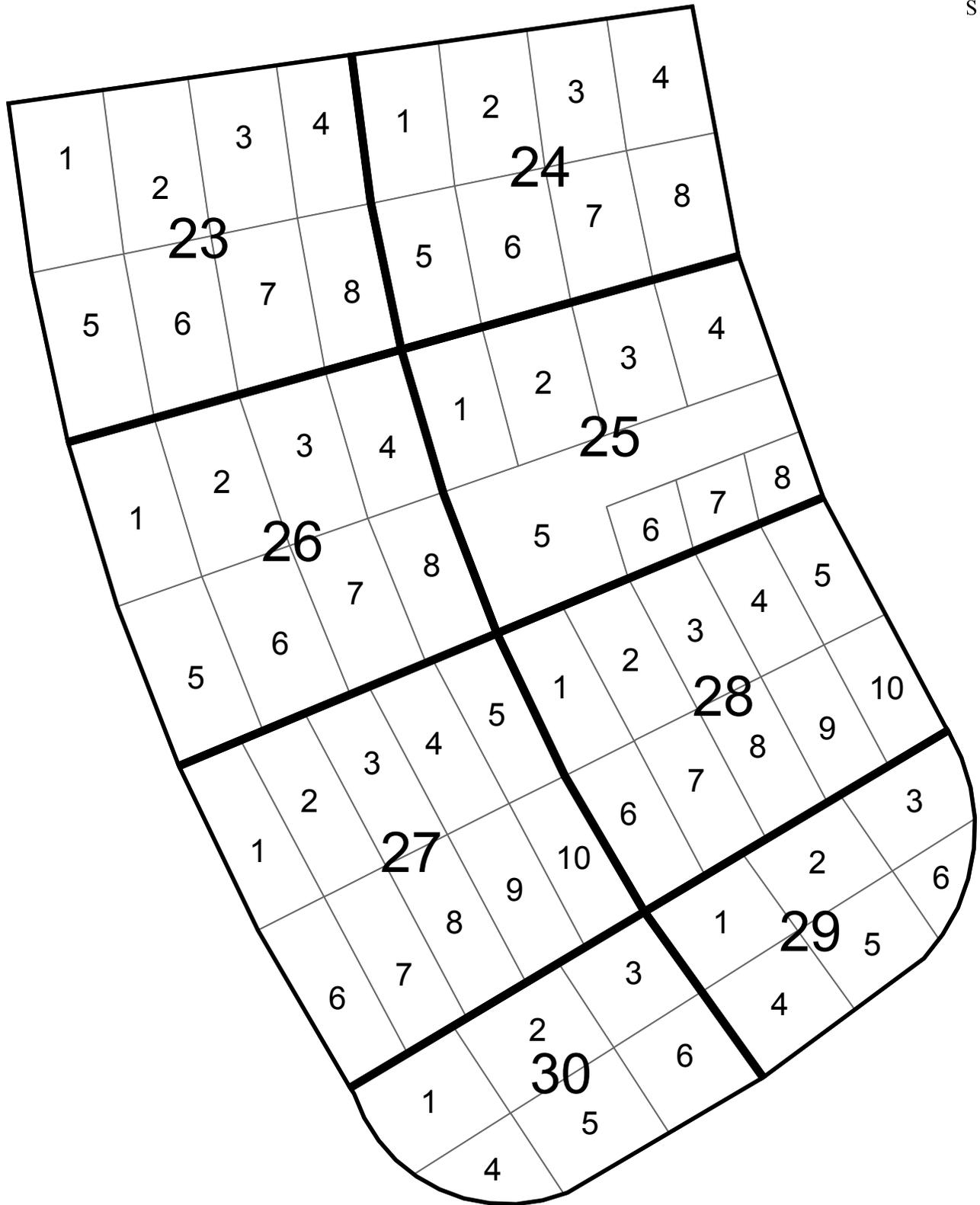
Section:AA



Oak Hill Cemetery
1101 Cemetery Rd
Lake Geneva, WI 53147

Maps prepared by Pontem Software

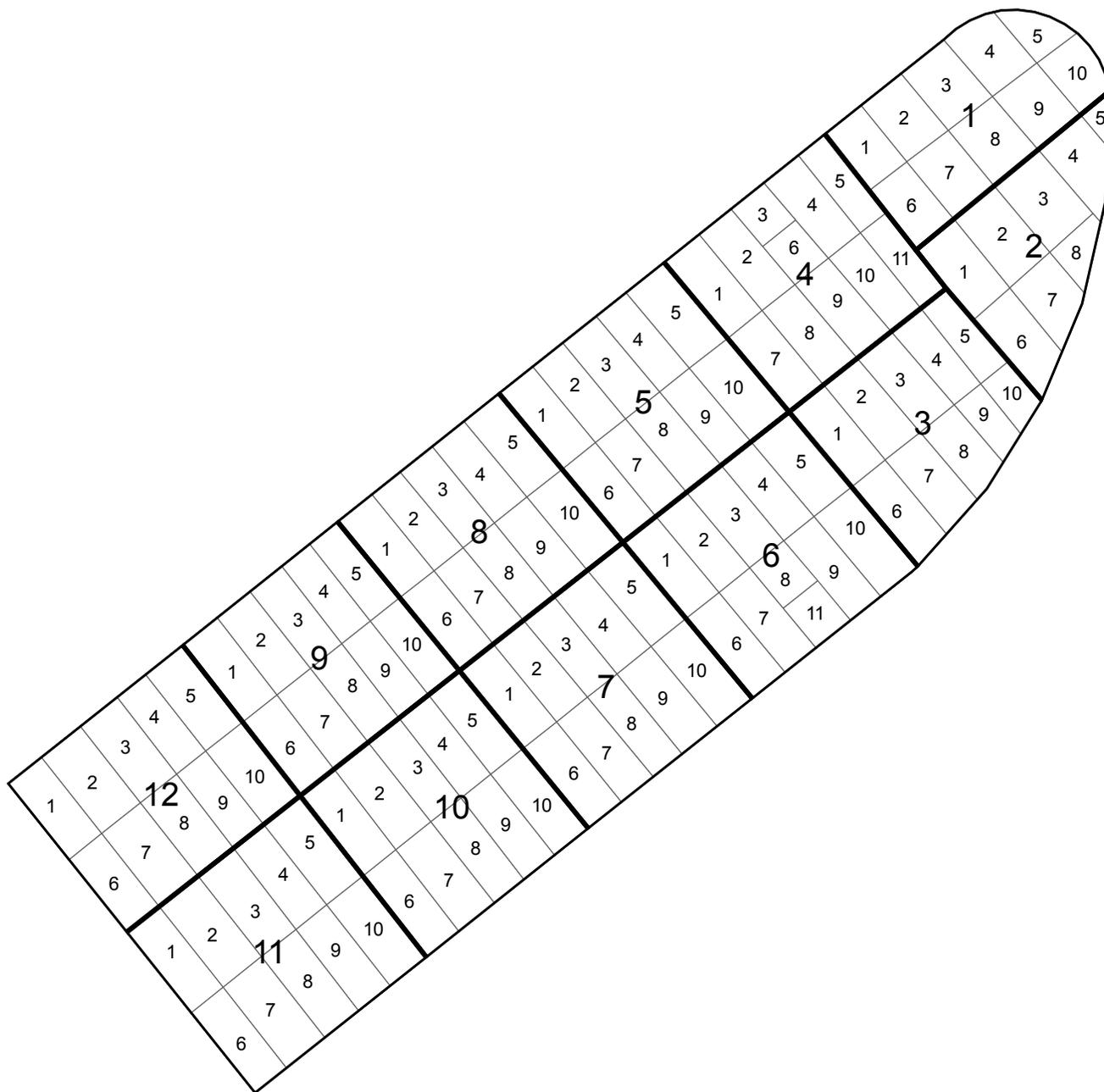
Section:AB



Oak Hill Cemetery
1101 Cemetery Rd
Lake Geneva, WI 53147

Maps prepared by Pontem Software

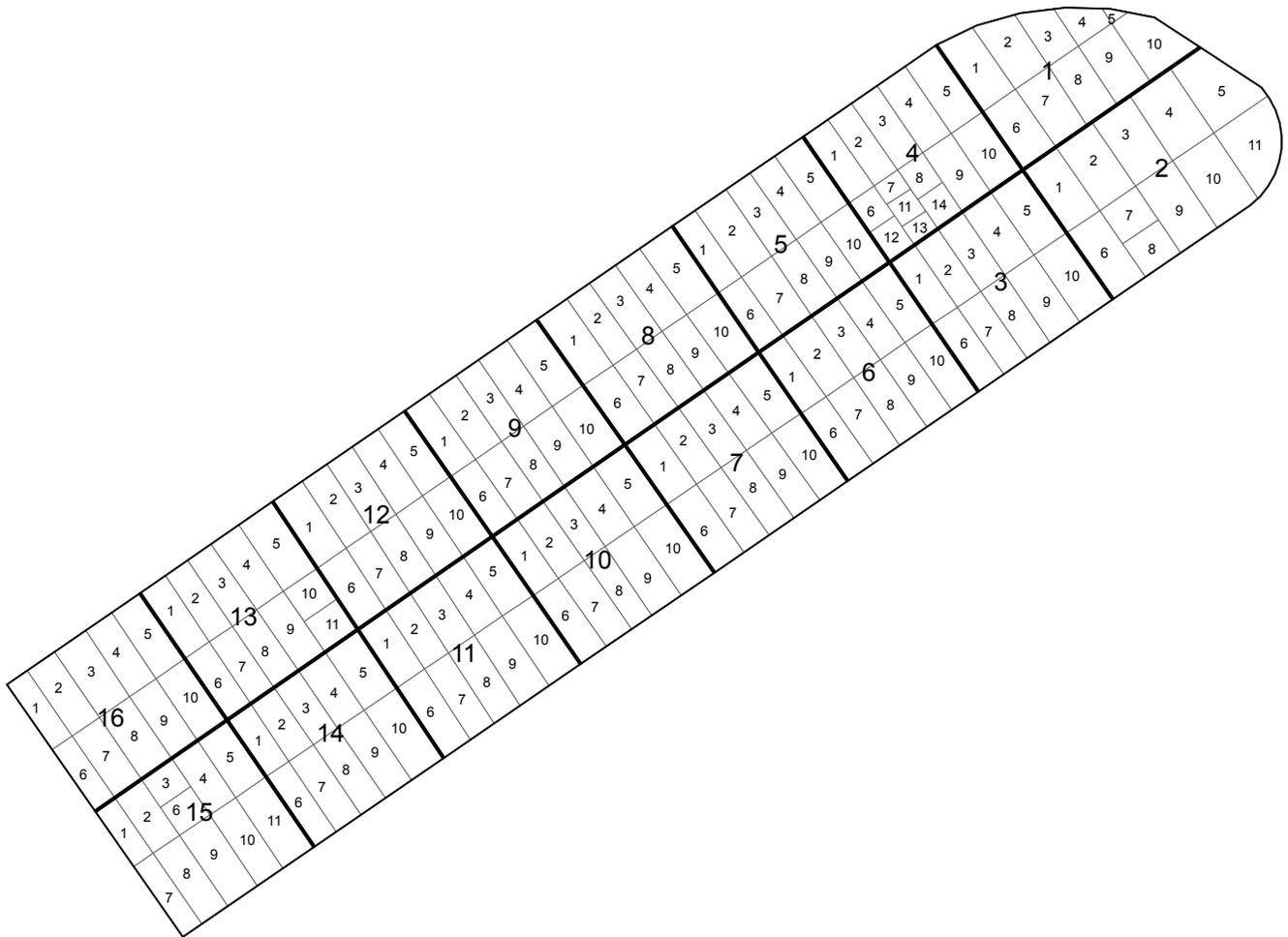
Section:AD



Oak Hill Cemetery
1101 Cemetery Rd
Lake Geneva, WI 53147

Maps prepared by Pontem Software

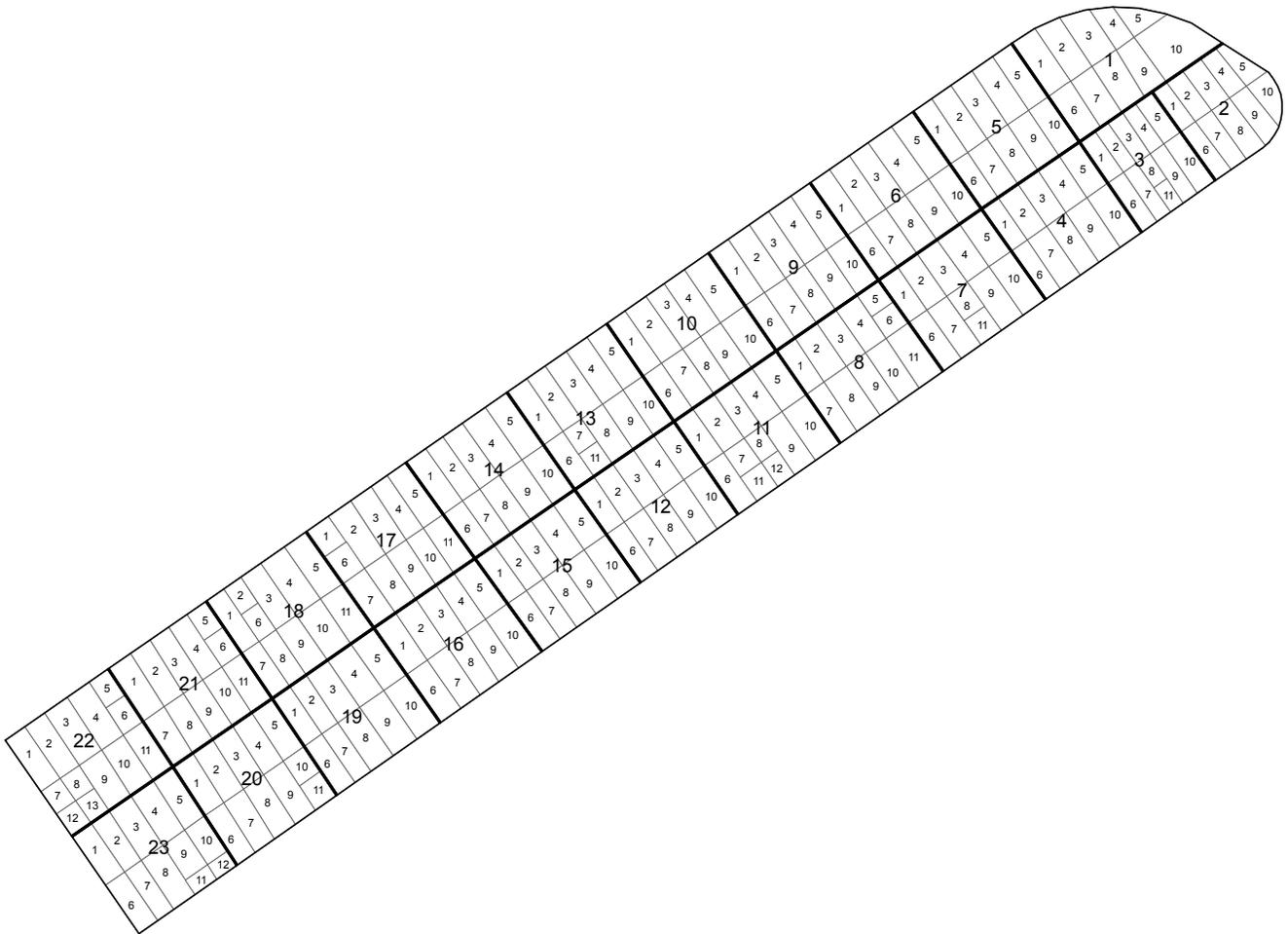
Section:AE



Oak Hill Cemetery
1101 Cemetery Rd
Lake Geneva, WI 53147

Maps prepared by Pontem Software

Section:AF



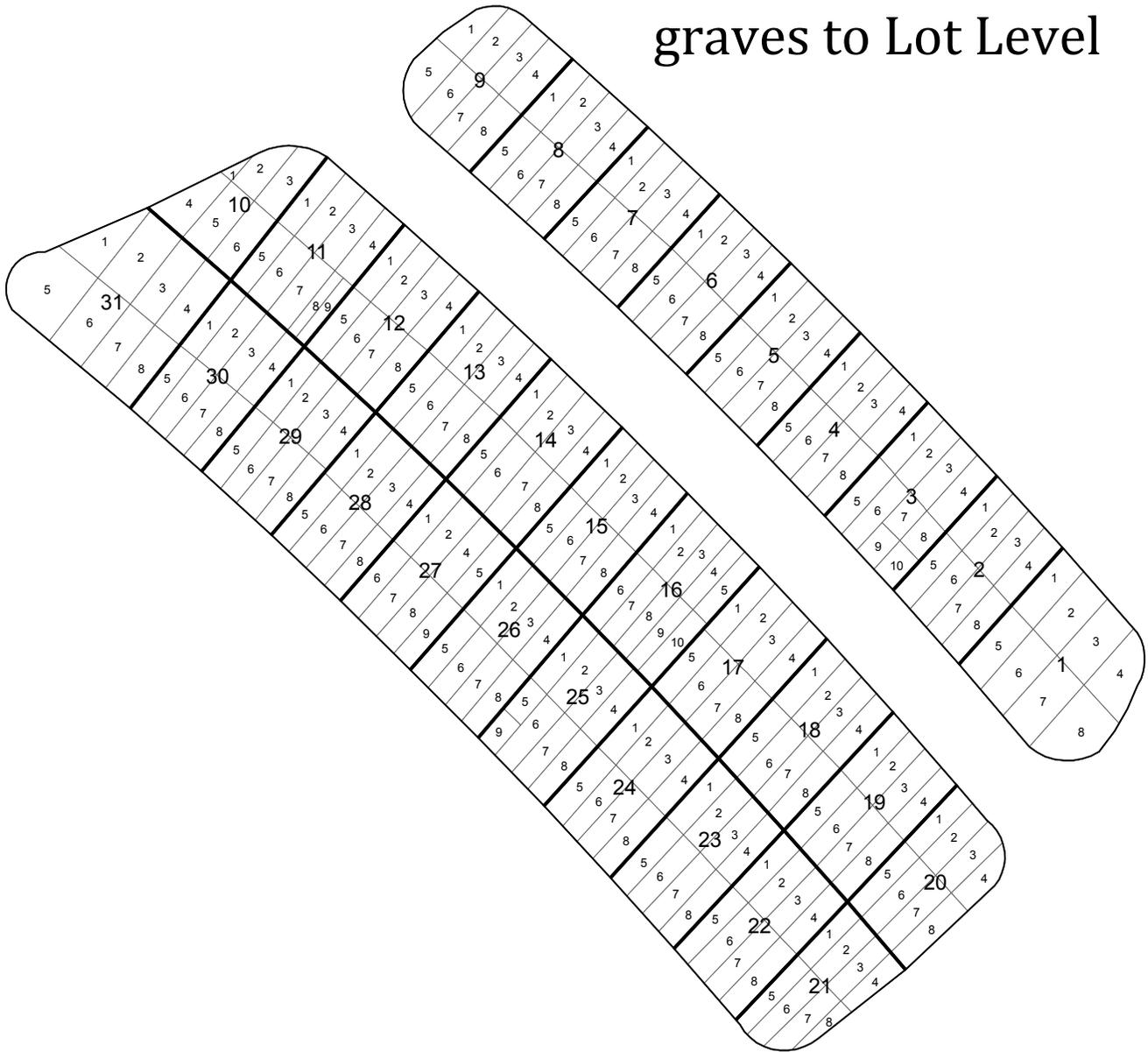
Oak Hill Cemetery
1101 Cemetery Rd
Lake Geneva, WI 53147

Maps prepared by Pontem Software

Section: B



Pontem to combine graves to Lot Level



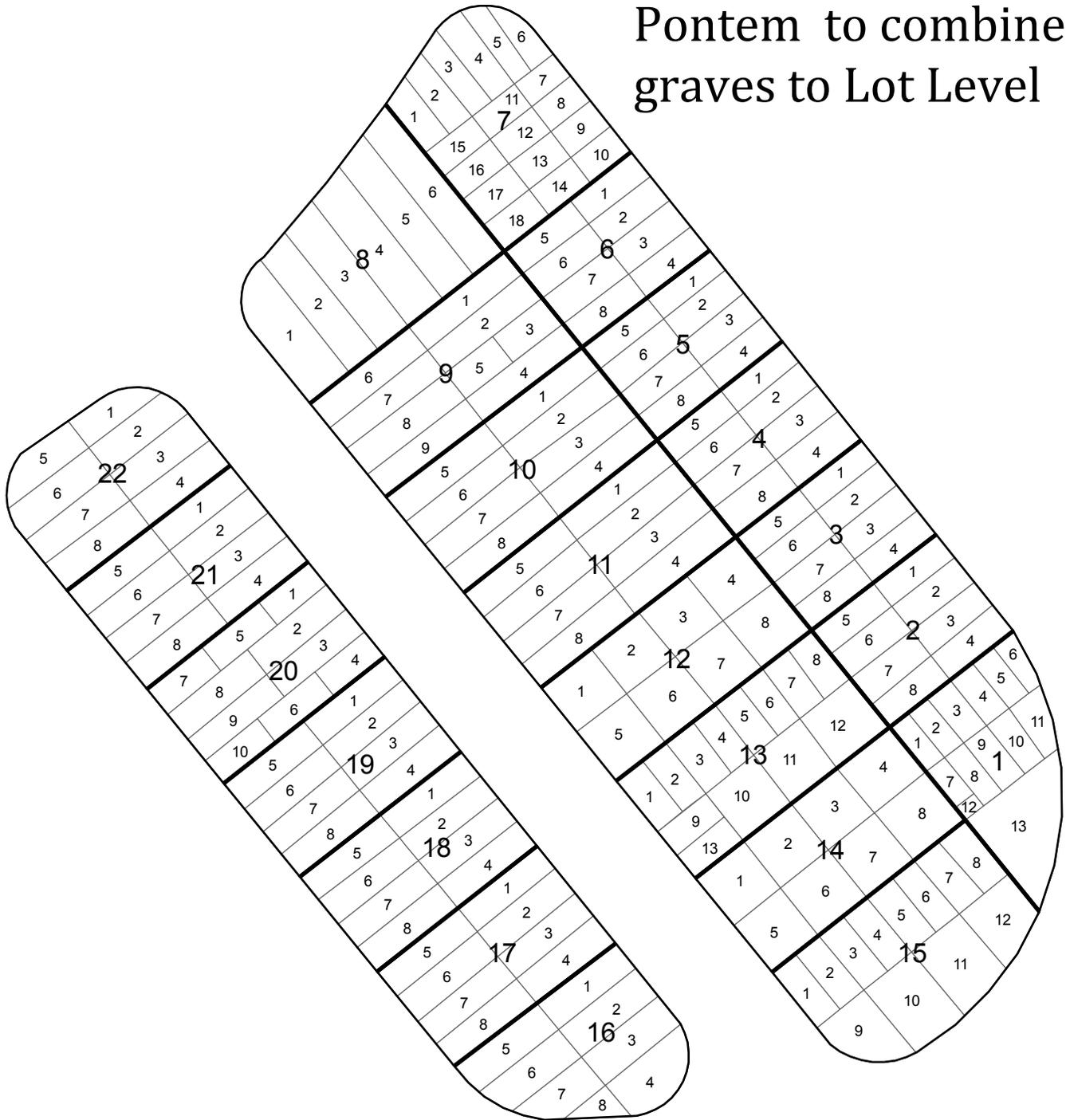
Oak Hill Cemetery
1101 Cemetery Rd
Lake Geneva, WI 53147

Maps prepared by Pontem Software

Section:C



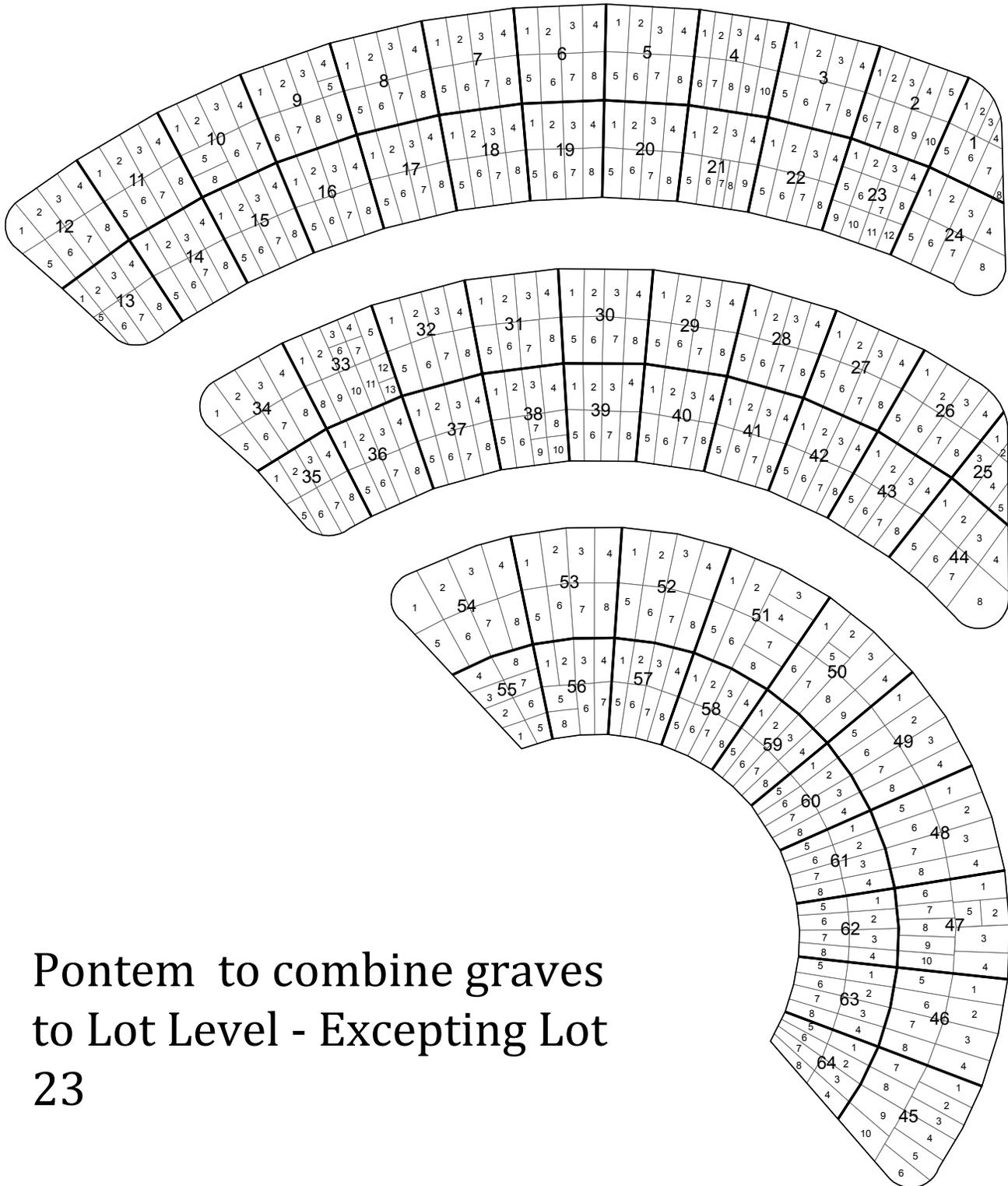
Pontem to combine
graves to Lot Level



Oak Hill Cemetery
1101 Cemetery Rd
Lake Geneva, WI 53147

Maps prepared by Pontem Software

Section:D



Pontem to combine graves
to Lot Level - Excepting Lot
23

Oak Hill Cemetery
1101 Cemetery Rd
Lake Geneva, WI 53147

Maps prepared by Pontem Software

Section: E



4	8		3	6	8
3	174	7	2	173	5 7
2		6			
1	5		1	4	
4	8		4	8	
3	171	7	3	172	7
2		6	2		6
1	5		1	5	
4	8		4	8	12
3	170	7	3	169	7 11
2		6	2		6 10
1	5		1	5	9
4	8		4	8	
3	167	7	3	168	7
2		6	2		6
1	5		1	5	
4	8		3	6	
3	166		2	165	5
2		6			
1	5		1	4	
4	8		4	8	
3	163	7	3	164	7
2		6	2		6
1	5		1	5	
4	8		4	8	
3	162	7	3	161	7 9
2		6	2		6
1	5		1	5	
4	7	8	4	8	
3	159		3	160	7
2		6	2		6
1	5		1	5	
4	8		4	8	9
3	158	7	3	157	7
2		6	2		6
1	5		1	5	
4	8		4	8	
3	155	7	3	156	7
2		6	2		6
1	5		1	5	
4	8		4	8	
3	154	7	3	153	7
2		6	2		6
1	5		1	5	
4	8		4	9	
3	151	7	3	152	8
2		6	2		7
1	5		1	6	
4	8		4	8	
3	150	7	3	149	7
2		6	2		6
1	5		1	5	

Pontem to combine
graves to Lot Level

4	8		4	8	
3	147	7	3	148	7
2		6	2		6
1	5		1	5	
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2		6			
1	5		1	4	
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3	143	7	3	144	7
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1	5		1	5	
4	8		4	8	
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2		6	2		6
1	5		1	5	
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2		6	2		6
1	5		1	5	
4	8		4	8	
3	138	7	3	137	7
2		6	2		6
1	5		1	5	
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3	135	7	3	136	7
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1	5		1	5	
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3	131	7	3	132	7
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1	5		1	5	
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3	130	7	3	129	7
2		6	2		6
1	5		1	5	

Oak Hill Cemetery
1101 Cemetery Rd
Lake Geneva, WI 53147

Maps prepared by Pontem Software

Section: E



4	8	4	8
3	127	3	128
2	6	2	6
1	5	1	5
4	8	4	8
3	126	3	125
2	6	2	6
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4	8	4	8
3	123	3	124
2	6	2	6
1	5	1	5
4	8	4	8
3	122	3	121
2	6	2	6
1	5	1	5
4	8	4	8
3	119	3	120
2	6	2	6
1	5	1	5
4	8	4	8
3	118	3	117
2	6	2	6
1	5	1	5
4	7	3	6
3	115	3	116
2	5	1	4
1	5	1	5
3	6	3	5
2	114	2	113
1	4	1	4
4	8	4	8
3	111	3	112
2	6	2	6
1	5	1	5
4	8	4	8
3	110	3	109
2	6	2	6
1	5	1	5
4	8	4	8
3	107	3	108
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1	5	1	5
4	8	4	8
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1	5	1	5
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3	103	3	104
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4	8	4	8
3	99	3	100
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1	5	1	5

Pontem to combine graves to Lot Level

4	8	4	8
3	95	3	96
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1	5	1	5
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3	6	3	6
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1	4	1	4
4	8	4	8
3	74	3	73
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1	5	1	5
3	6	3	6
2	71	2	72
1	4	1	5
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3	70	3	69
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1	5	1	5

Oak Hill Cemetery
 1101 Cemetery Rd
 Lake Geneva, WI 53147

Section:E



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1	4	1	4

Pontem to combine graves to Lot Level

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3	18	3	17
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1	5	1	6
4	8	4	8
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2	6	2	6
1	5	1	5
4	8	4	8
3	22	3	21
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3	23	3	24
2	6	2	6
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3	26	3	25
2	6	2	6
1	5	1	5
4	8	4	8
3	27	3	28
2	6	2	6
1	5	1	5
4	8	4	8
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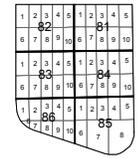
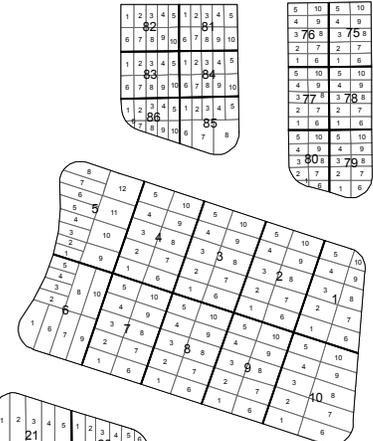
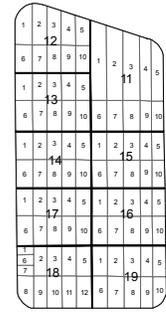
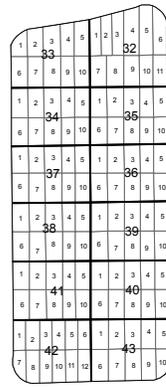
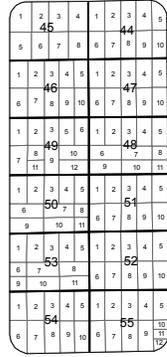
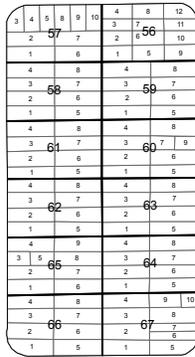
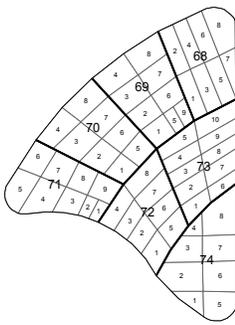
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1	5	1	5
4	8	4	8
3	38	3	37
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1	5	1	5

Oak Hill Cemetery
 1101 Cemetery Rd
 Lake Geneva, WI 53147

Section:F



Pontem to combine graves to Lot Level



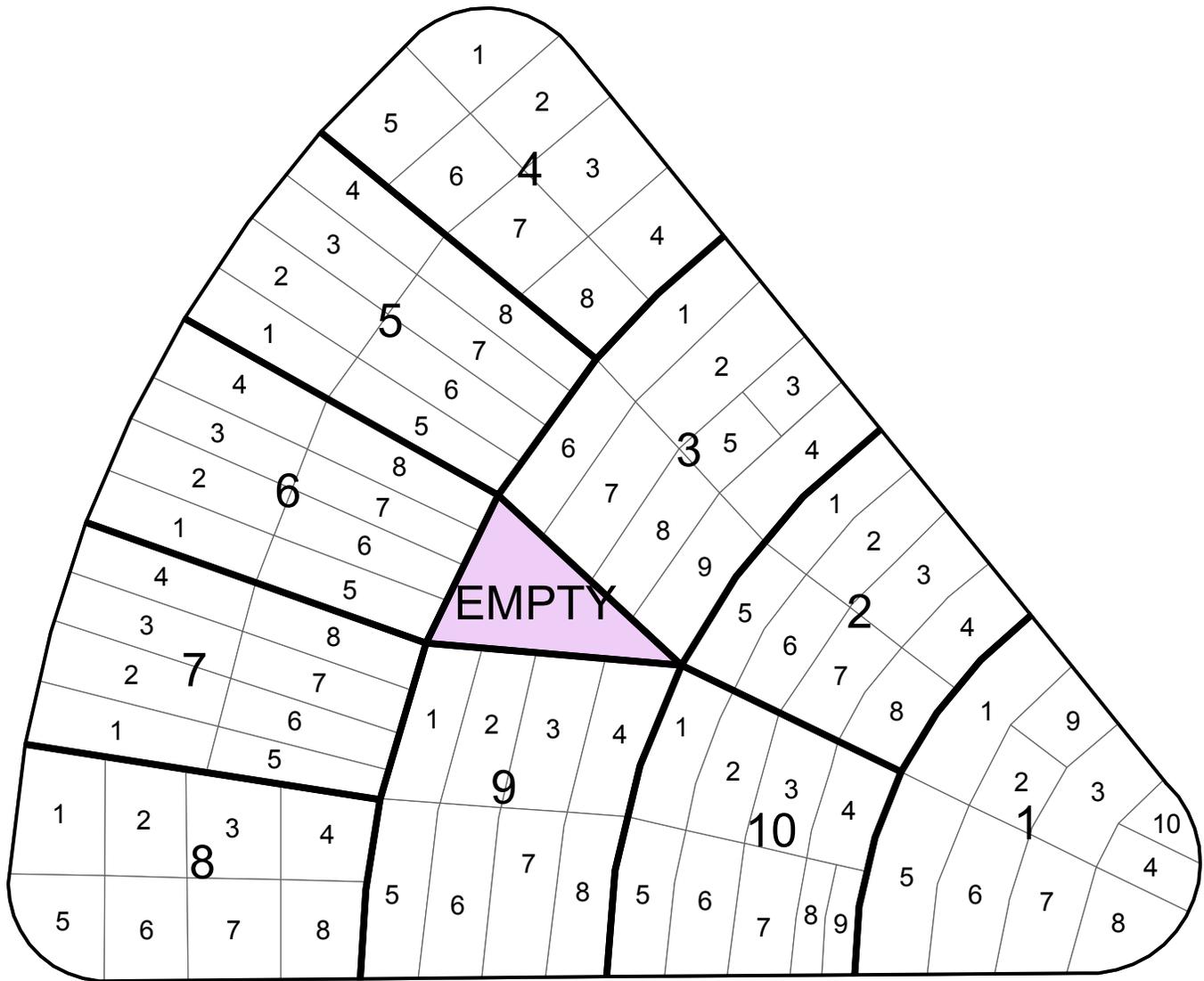
Oak Hill Cemetery
1101 Cemetery Rd
Lake Geneva, WI 53147

Maps prepared by Pontem Software

Section:G



Pontem to combine
graves to Lot Level



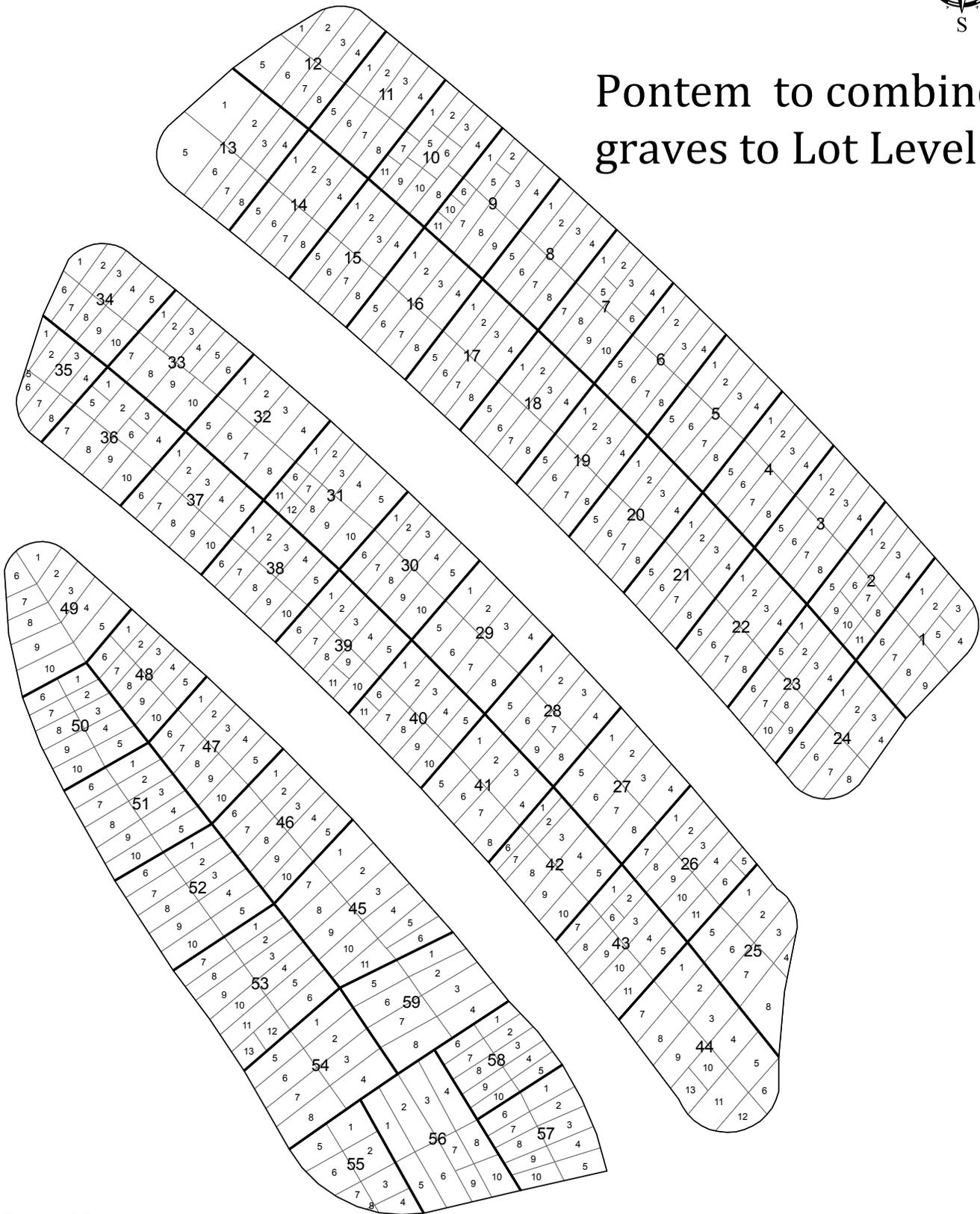
Oak Hill Cemetery
1101 Cemetery Rd
Lake Geneva, WI 53147

Maps prepared by Pontem Software

Section:H



Pontem to combine
graves to Lot Level



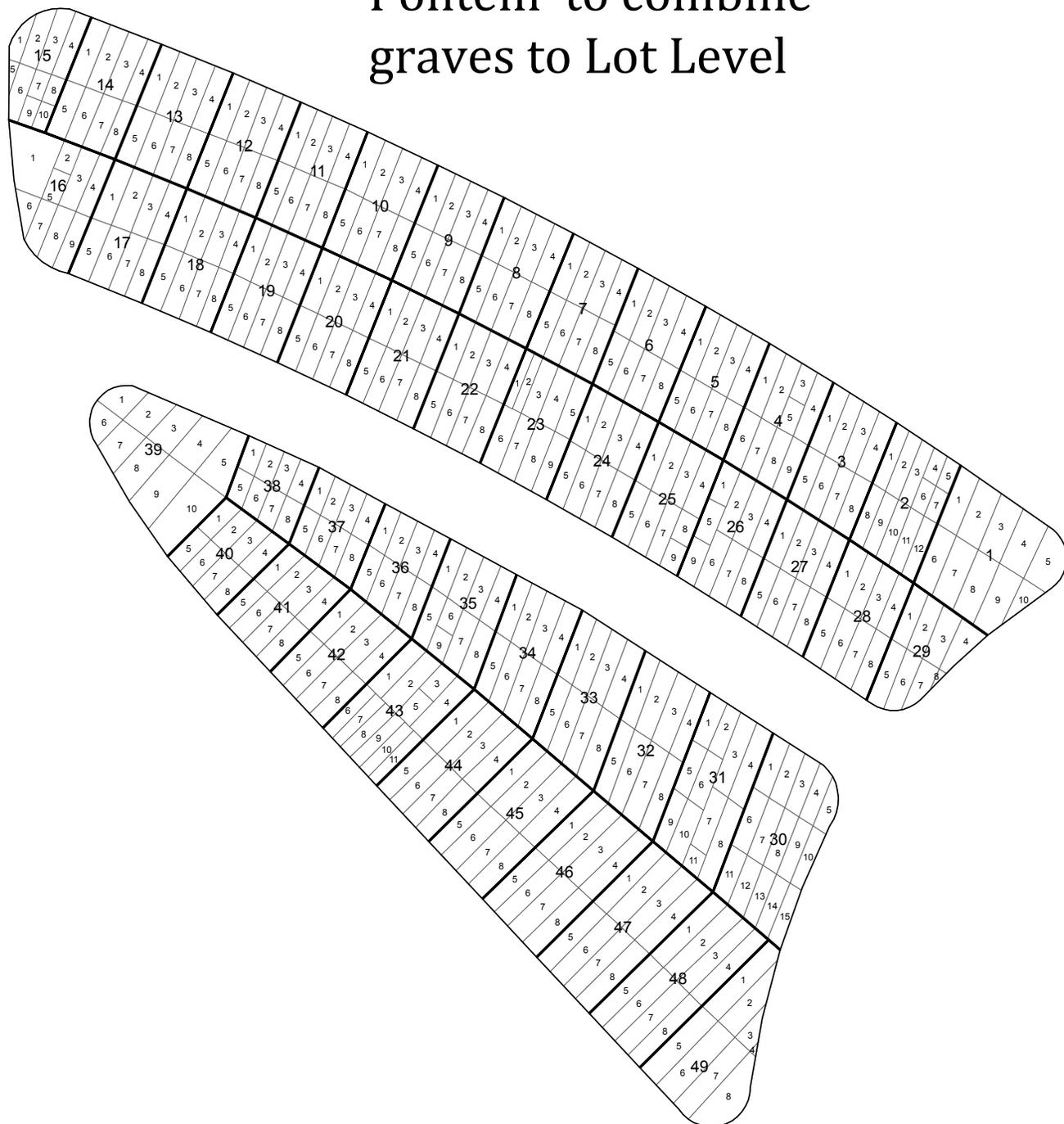
Oak Hill Cemetery
1101 Cemetery Rd
Lake Geneva, WI 53147

Maps prepared by Pontem Software

Section:I



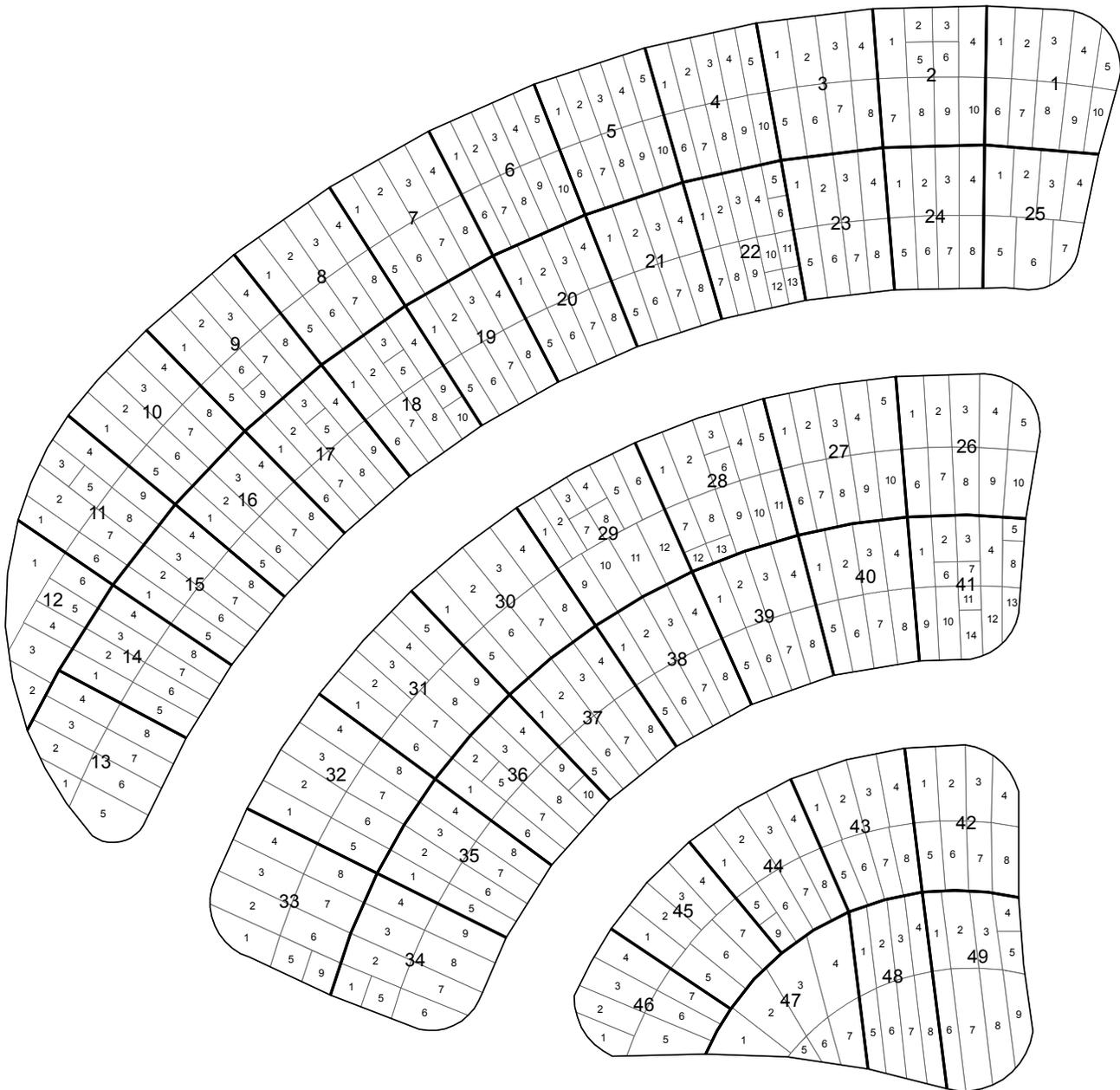
Pontem to combine graves to Lot Level



Oak Hill Cemetery
1101 Cemetery Rd
Lake Geneva, WI 53147

Maps prepared by Pontem Software

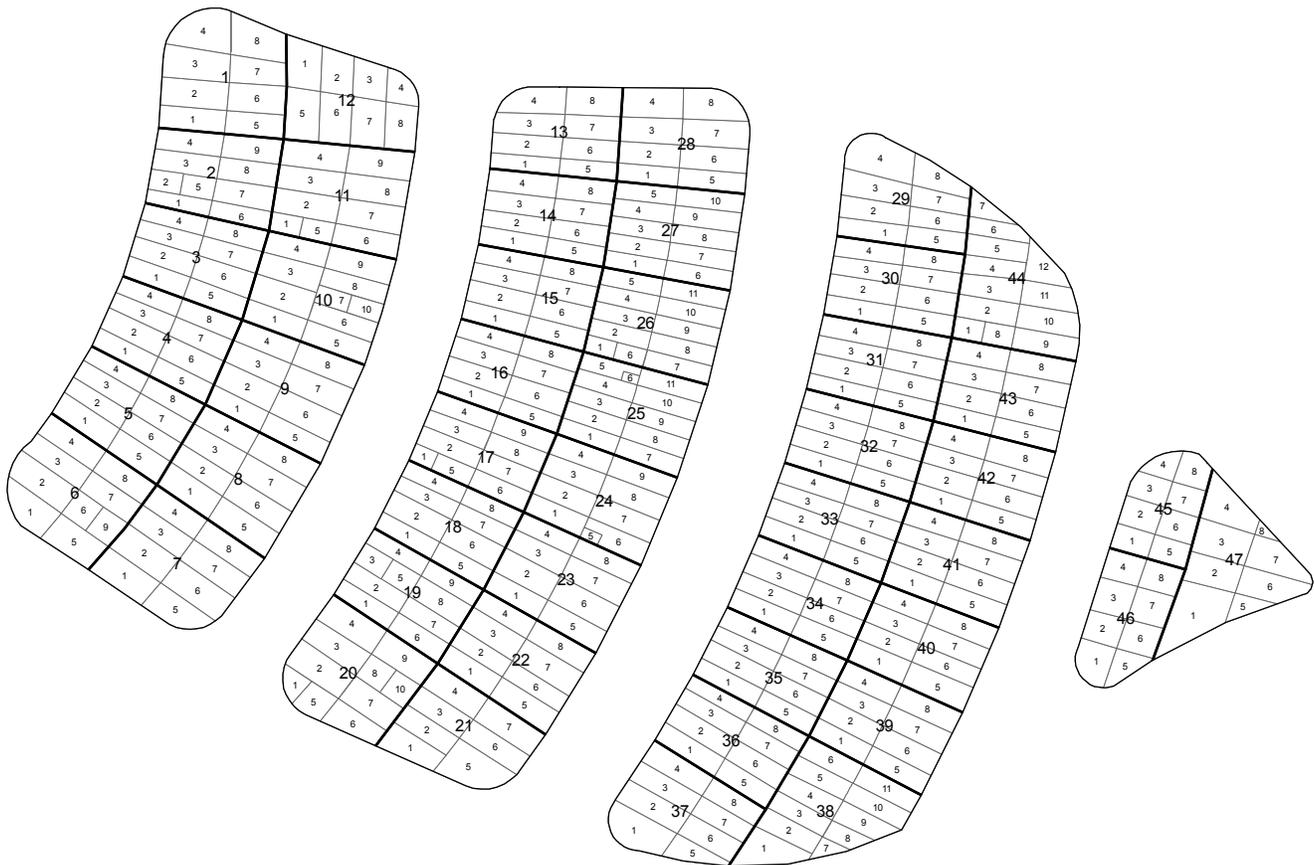
Section:J



Oak Hill Cemetery
1101 Cemetery Rd
Lake Geneva, WI 53147

Maps prepared by Pontem Software

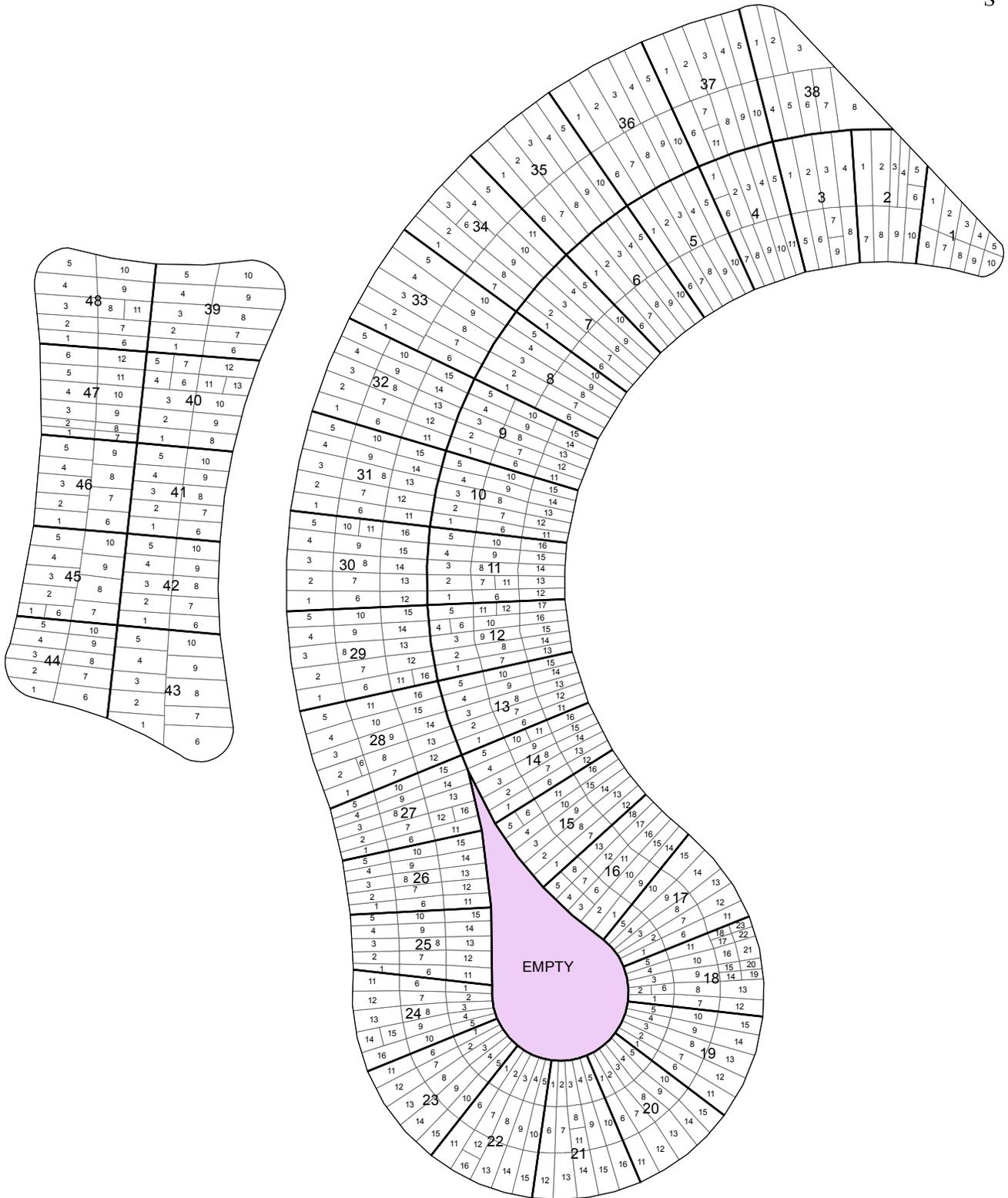
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Oak Hill Cemetery
1101 Cemetery Rd
Lake Geneva, WI 53147

Maps prepared by Pontem Software

Section:L



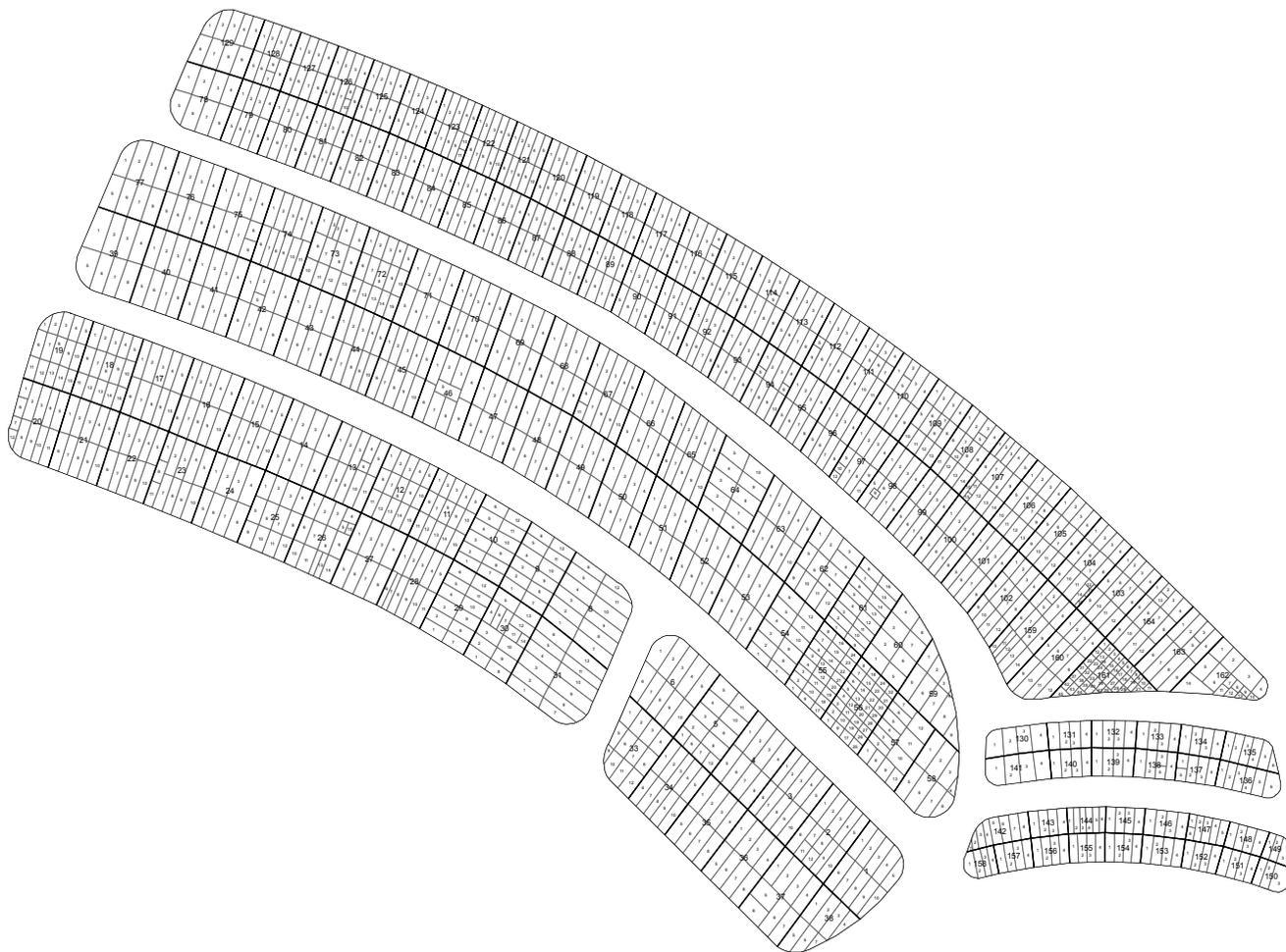
Oak Hill Cemetery
1101 Cemetery Rd
Lake Geneva, WI 53147

Maps prepared by Pontem Software

Section:N



Pontem to combine graves to Lot Level



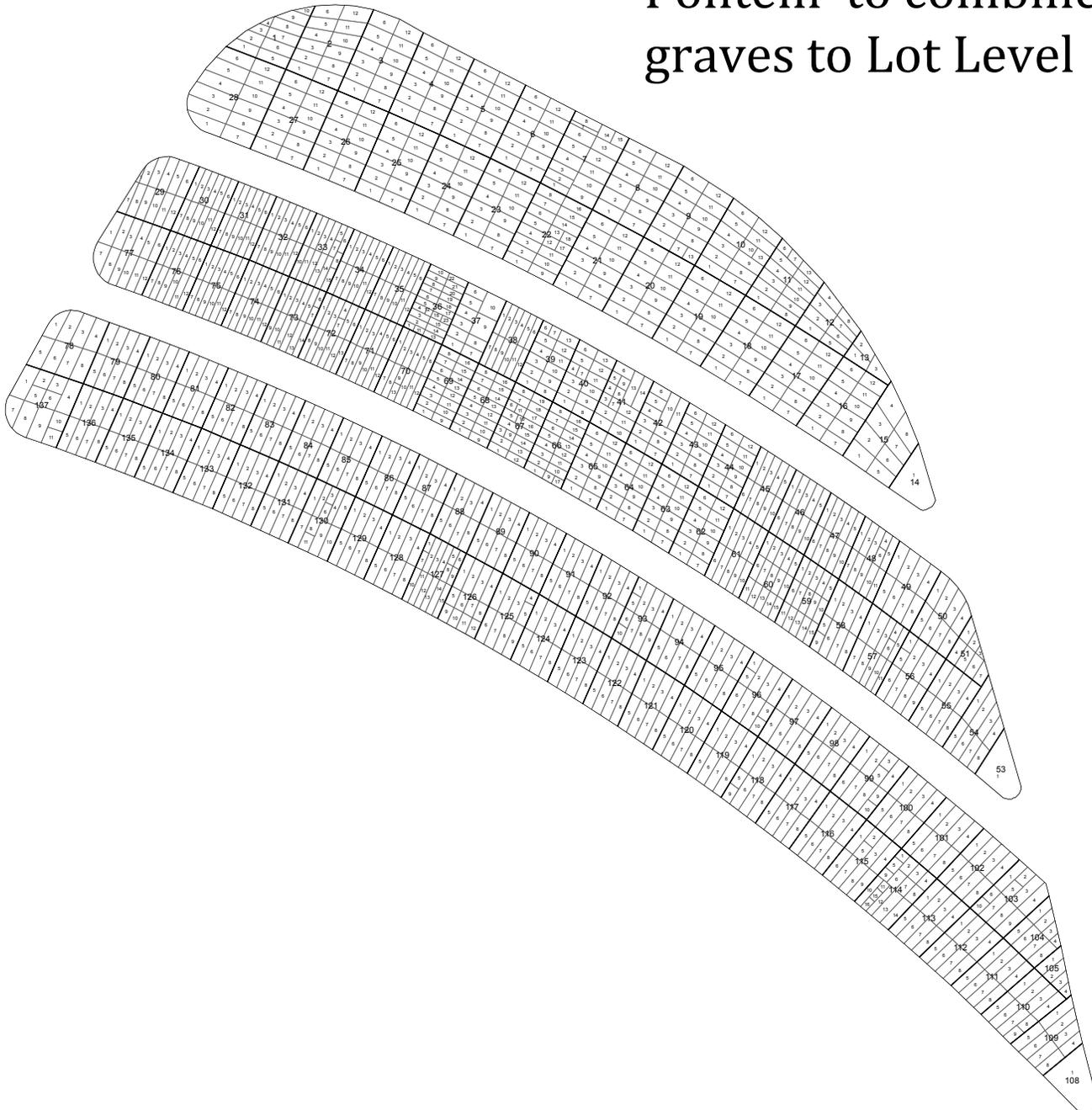
Oak Hill Cemetery
1101 Cemetery Rd
Lake Geneva, WI 53147

Maps prepared by Pontem Software

Section:O



Pontem to combine graves to Lot Level



Oak Hill Cemetery
1101 Cemetery Rd
Lake Geneva, WI 53147

Maps prepared by Pontem Software

Section:PF



4	8	4	8
3	183	7	184
2	6	2	6
1	5	1	5
4	8	4	8
3	182	7	181
2	6	2	6
1	5	1	5
4	8	4	8
3	179	7	180
2	6	2	6
1	5	1	5
4	8	4	8
3	178	7	177
2	6	2	6
1	5	1	5
4	8	4	8
3	175	7	176
2	6	2	6
1	5	1	5
3	6	4	8
2	174	5	173
1	4	1	5
4	8	4	8
3	171	7	172
2	6	2	6
1	5	1	5
4	8	4	8
3	170	7	169
2	6	2	6
1	5	1	5
4	8	4	8
3	167	7	168
2	6	2	6
1	5	1	5
4	8	4	8
3	166	7	165
2	6	2	6
1	5	1	5
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1	4	1	5
3	6	4	8
2	162	5	161
1	4	1	5
3	6	4	11
2	159	5	160
1	4	1	5

Pontem to combine
graves to Lot Level

3	6	4	8
2	158	5	157
1	4	1	5
4	8	4	8
3	155	7	156
2	6	2	6
1	5	1	5
4	8	4	8
3	154	7	153
2	6	2	6
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3	151	7	152
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1	4	1	5
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3	150	7	149
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3	147	7	148
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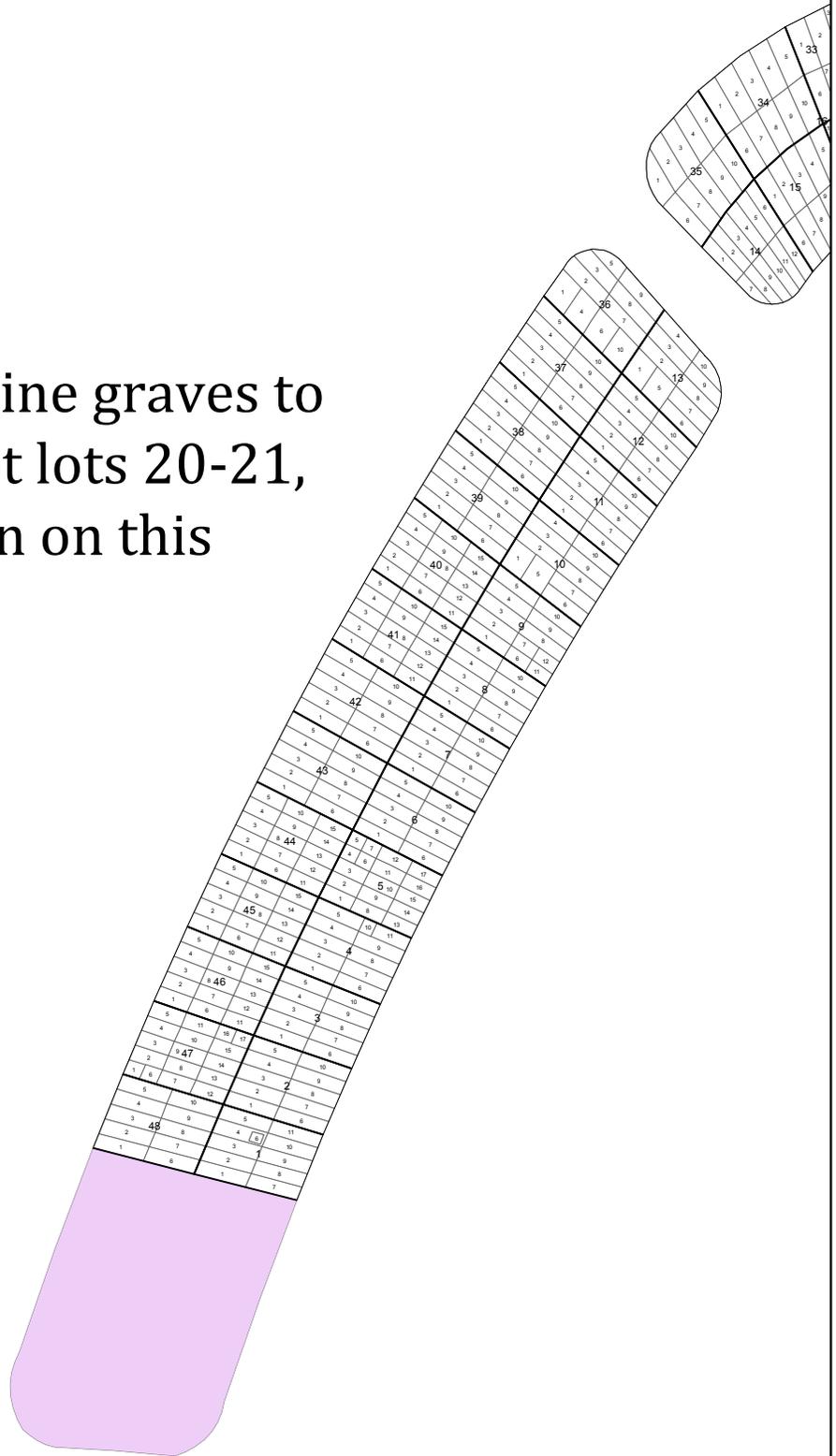
Oak Hill Cemetery
1101 Cemetery Rd
Lake Geneva, WI 53147

Maps prepared by Pontem Software

Section:R



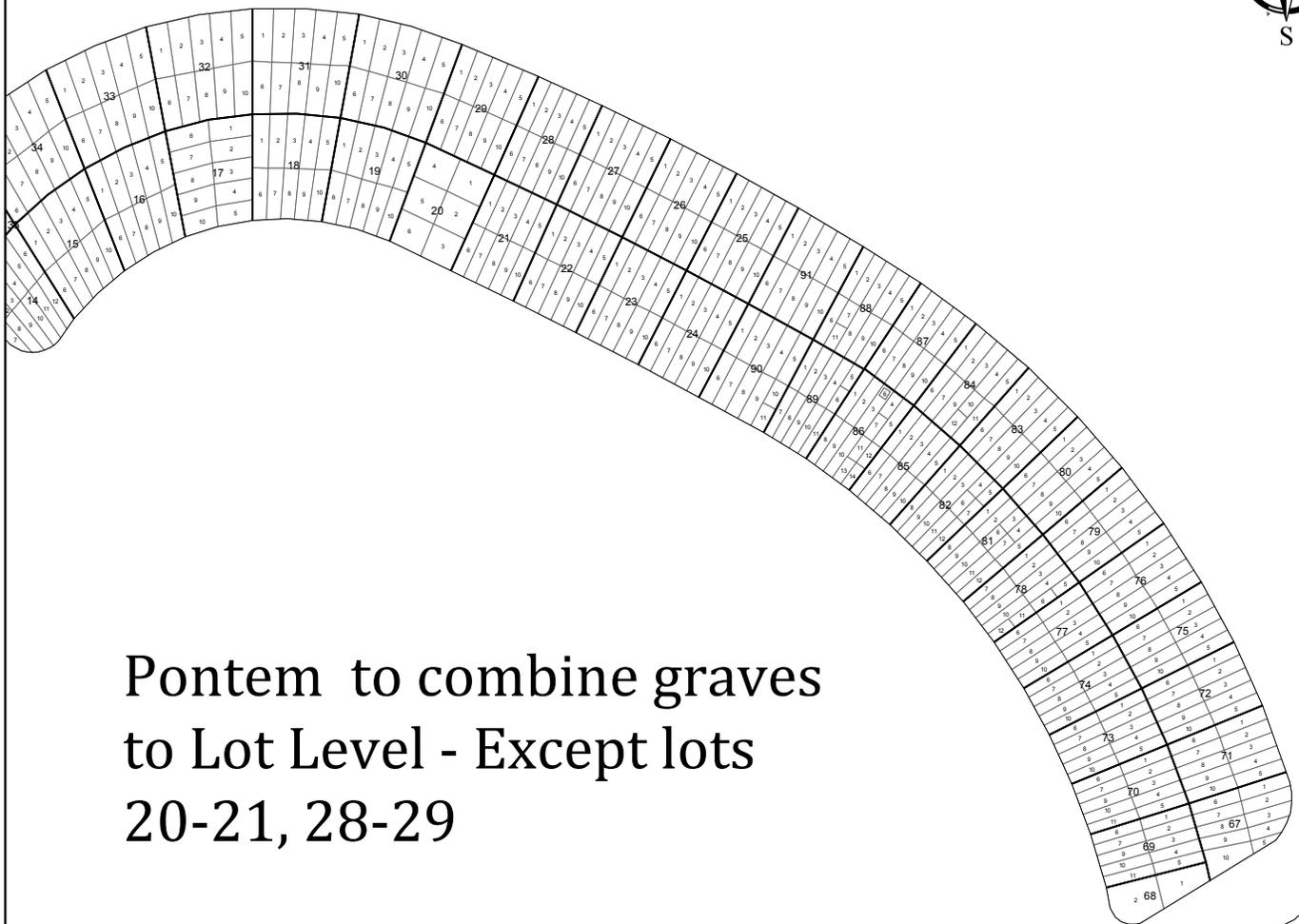
Pontem to combine graves to
Lot Level - Except lots 20-21,
28-29 (not shown on this
page)



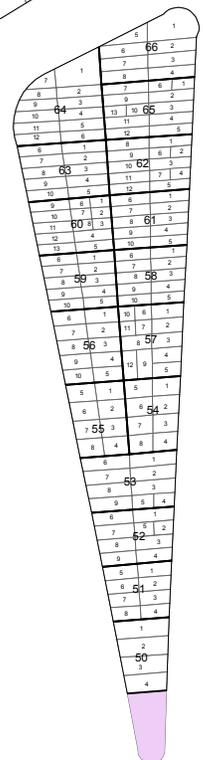
Oak Hill Cemetery
1101 Cemetery Rd
Lake Geneva, WI 53147

Maps prepared by Pontem Software

Section:R



Pontem to combine graves
to Lot Level - Except lots
20-21, 28-29



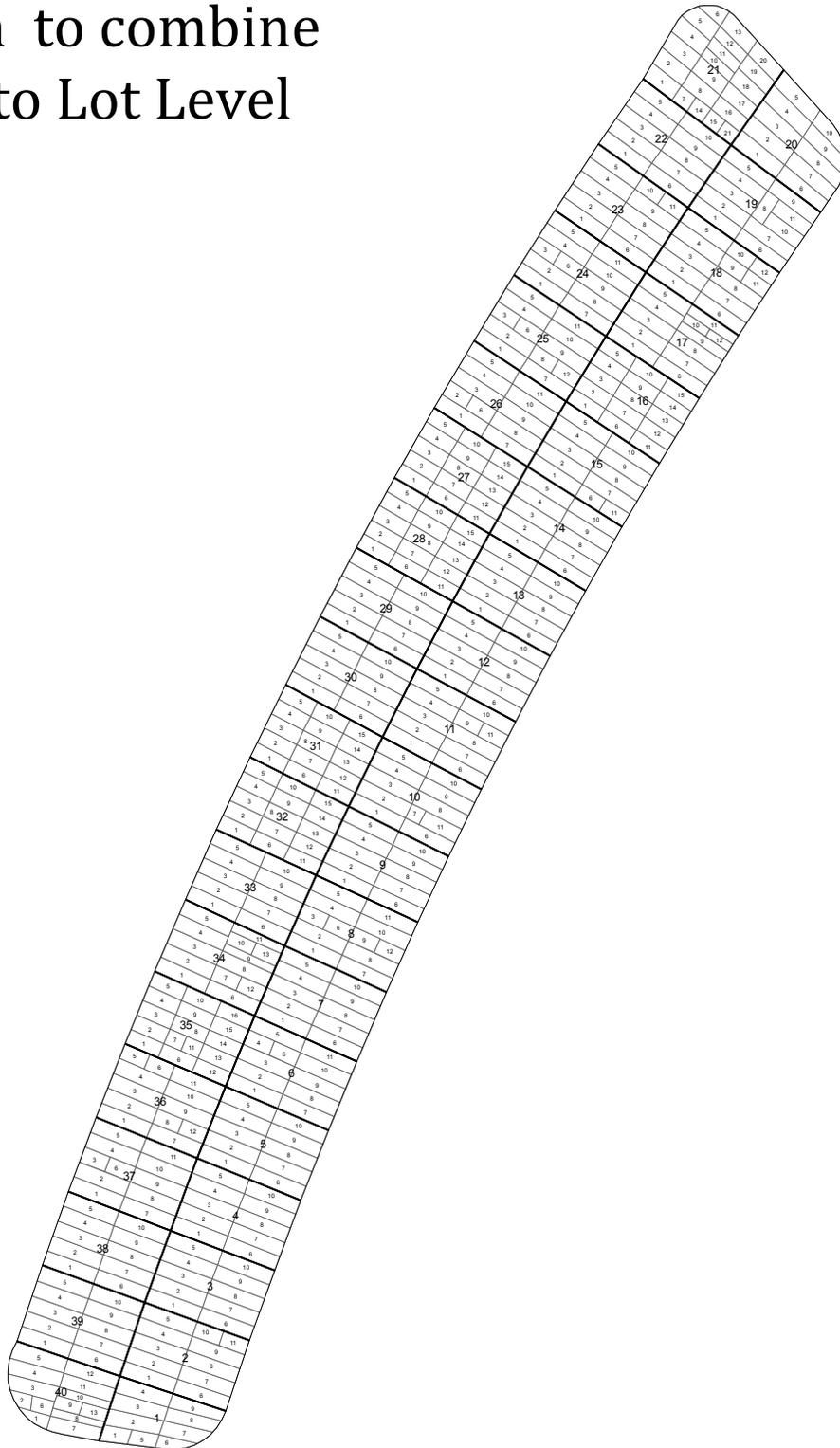
Oak Hill Cemetery
1101 Cemetery Rd
Lake Geneva, WI 53147

Maps prepared by Pontem Software

Section:S



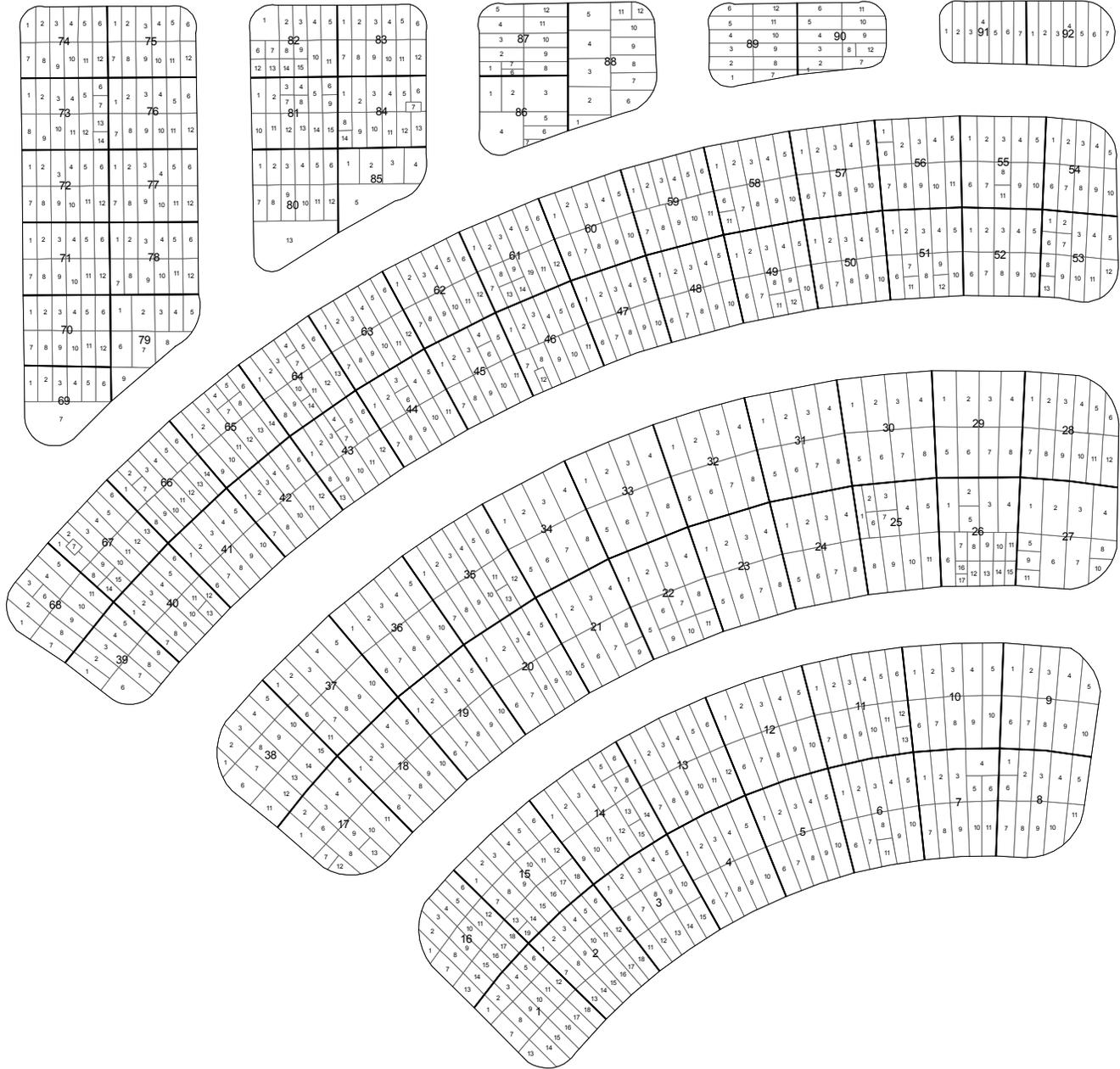
Pontem to combine
graves to Lot Level



Oak Hill Cemetery
1101 Cemetery Rd
Lake Geneva, WI 53147

Maps prepared by Pontem Software

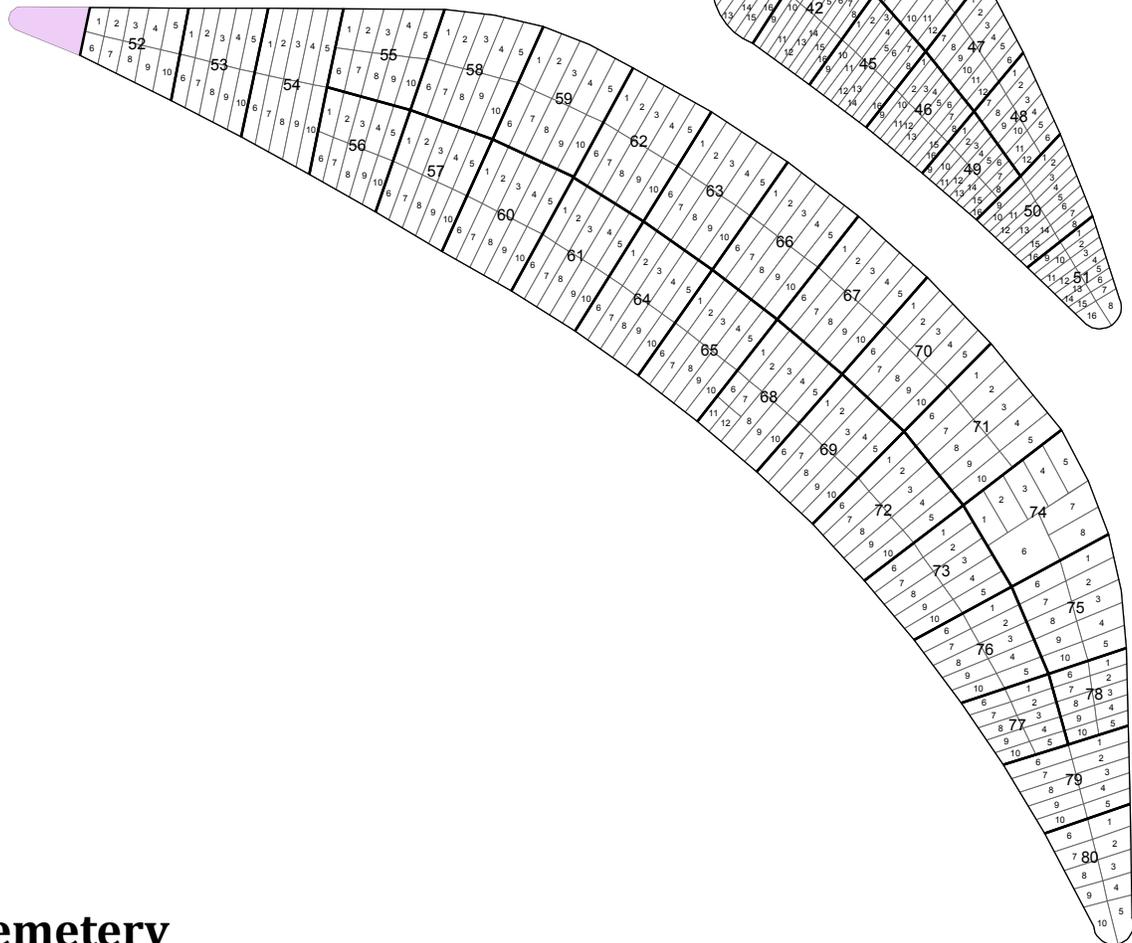
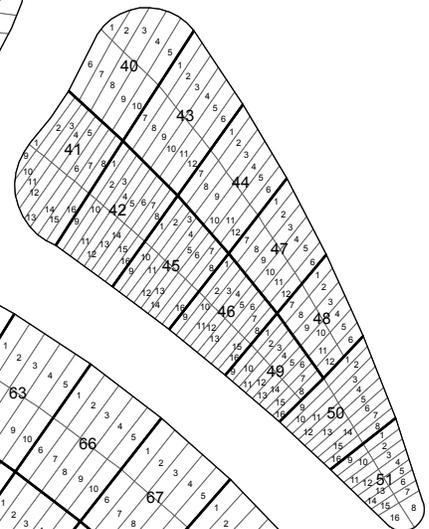
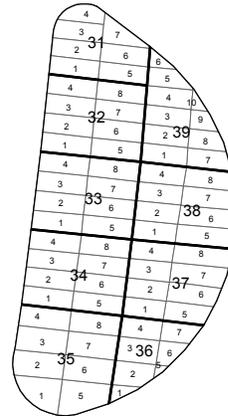
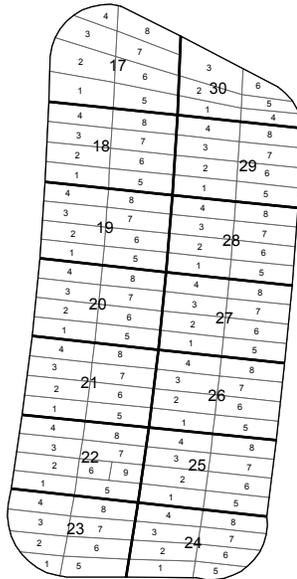
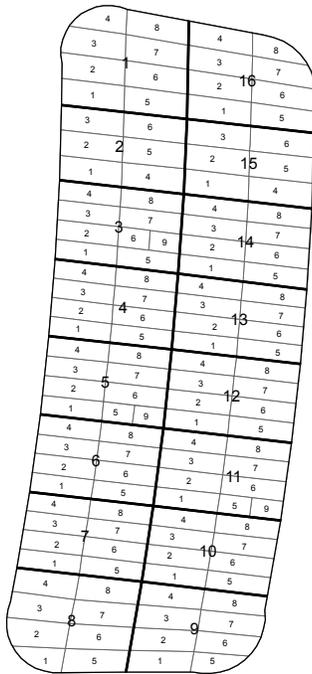
Section:T



Oak Hill Cemetery
1101 Cemetery Rd
Lake Geneva, WI 53147

Maps prepared by Pontem Software

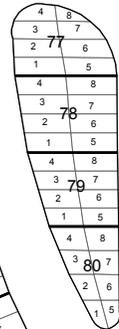
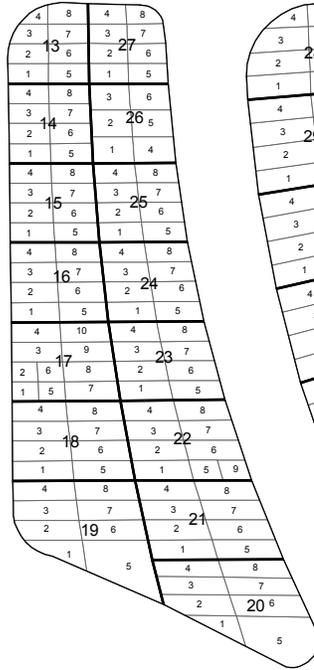
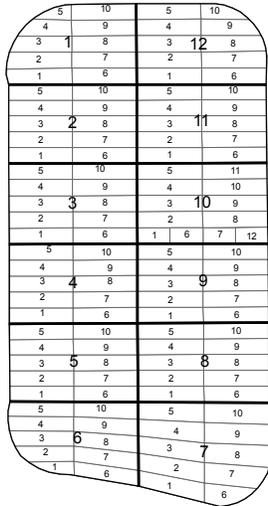
Section:U



Oak Hill Cemetery
1101 Cemetery Rd
Lake Geneva, WI 53147

Maps prepared by Pontem Software

Section:W



Oak Hill Cemetery
1101 Cemetery Rd
Lake Geneva, WI 53147

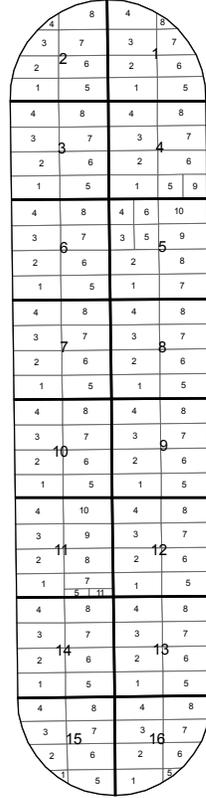
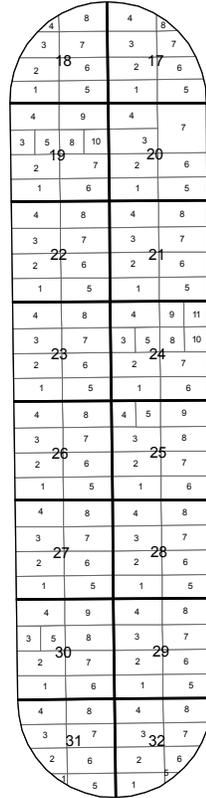
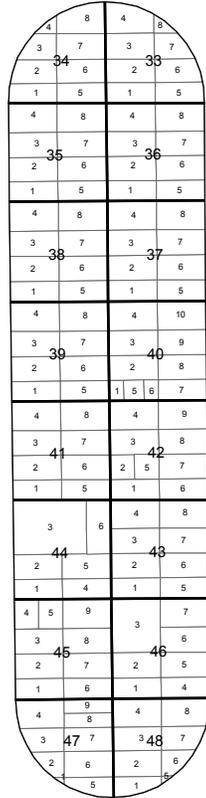
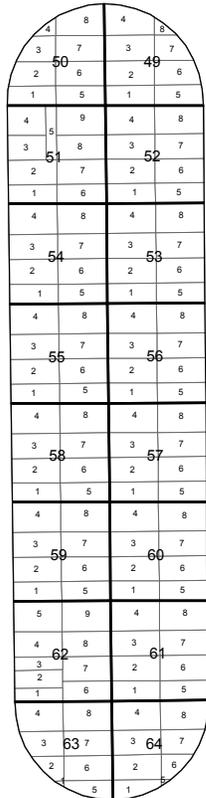
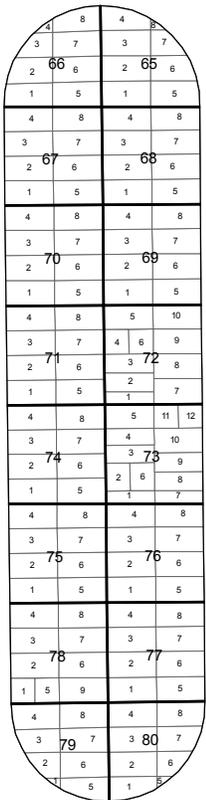
Maps prepared by Pontem Software

Section: Y



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Section:Z



Oak Hill Cemetery
1101 Cemetery Rd
Lake Geneva, WI 53147

Maps prepared by Pontem Software

**City of Lake Geneva
Oak Hill Cemetery Mapping Plan**

<u>Block</u>	<u>Sections</u>	<u>Status</u>	<u>Mapping</u>	<u>Other issues</u>
Regular Graves				
A	1-79	Full	Section	
B	1-31	Full	Section	
C	1-22	Full	Section	
D	1-22	Full	Section	
D	24-64	Full	Section	
E	1-174	Full	Section	
F	1-86	Full	Section	
G	1-10	Full	Section	
H	1-59	Full	Section	
I	1-49	Full	Section	
J	1-49	Full	Grave	
K	1-44	Full	Grave	
L	1-48	Full	Grave	
M	1-4	Full	Section	
N	1-164	Full	Section	
O	1-137	Full	Section	
PF	1-184	Full	Section	No section cards so must use Internment Book
R	1-15	Full	Section	
R	22-27	Full	Section	
R	33-91	Full	Section	
S	1-40	Full	Section	
T	1-22	Open	Grave	
T	25-30	Open	Grave	
T	33-92	Open	Grave	
U	1-39	Open	Grave	
W	1-80	Open	Grave	
Y	1-210	Open	Grave	
Z	1-80	Open	Grave	
AA	1-47	Open	Grave	
AB	23-30	Open	Grave	
AC	23-34	Road		Not grave sites
AD	1-12	Open	Grave	
AE	1-16	Open	Grave	
AF	1-23	Open	Grave	
Baby Graves				
U	40-51	Open	Grave	
Mausoleums				
D		23 Full	Section	
R	20,21,28,29	Full	Section	

**City of Lake Geneva
Oak Hill Cemetery Mapping Plan**

Block Sections Status Mapping Other issues

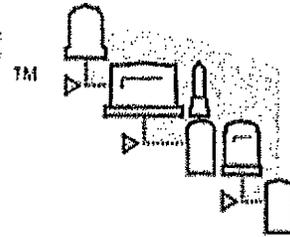
R	16,33	Full	Section	
R	17-19,30-32	Full	Section	
T	23,24,28,29	Full	Section	

Columbarium

East	1-24	Open	Niches
North	1-24	Open	Niches
West	1-24	Open	Niches
South	1-24	Open	Niches

Plan:

- 1) Lot Books - Input all
- 2) Internment Books - Input Block PF and all open Sections.
- 3) Lot Owner Cards - Only gather information for open Sections
- 4) Update from scan by checking receipts of sales and new interments



Proposal Prepared for Lake Geneva

Submitted January 12, 2016. Prices in this schedule are valid for 30 days.

webCemeteries.com Scanning, data entry, linking, programming

Objectives

1. webCemeteries.com will work off-site to enter the data off of the scanned images and link them together.
2. webCemeteries.com will provide the data to Pontem along with the linked images.

Scope of Services

1. The cemetery will provide webCemeteries.com with the scanned images in a .JPG format, indexed sequentially. There are an estimated 1,026 lot diagrams pages with two lots per page, 3,475 owner cards and 257 burial ledger pages. If the actual number of documents is higher, then the cost for this project may increase.
2. Kapur & Associates will provide webCemeteries.com with an online portal to login and view the GIS maps with the lot diagram cards linked to the corresponding lots and the interment numbers entered as the space numbers. webCemeteries.com staff will enter the burial names into the corresponding spaces, and enter the surname of the owner(s) when listed. Kapur & Associates will then provide the map data, images and names to Pontem to be imported to the software.
3. Pontem will provide webCemeteries.com with a copy of the location fields and data from the software database. webCemeteries.com will work remotely to link the owner cards for the open sections to the corresponding records and enter the full names of these owners. While entering an owner card, the database will be searched to find the corresponding section and lot/block/row that was entered off of the lot diagrams. Because the N, S, E, W sub-lot designations will not be entered, webCemeteries.com will attempt to match these records by the surname of the owner. When the records are matched, the full name of the owner will be entered off of the owner card. Records that do not match will be skipped for review and entry by the client. If the lot ownership is noted as transferred, webCemeteries.com will enter the new owner, except in cases where the location was divided or the location fields require internal interpretation. In these cases the card will be skipped for entry by the cemetery.
4. webCemeteries.com will work remotely to link the interment ledger pages to the database records for occupied spaces in the open sections and to enter the names and dates of burial for these deceased.
5. During each of the linking and data entry phases outlined above, webCemeteries.com project management staff will work with the cemetery staff to understand the documents and establish a set of rules for interpreting the records. This list of rules may evolve as the project progresses and the records are evaluated more closely.

During the linking and data entry outlined above, if a document requires internal interpretation for any reason, the document will be flagged for review by the client. The client will have the ability to review the document, add a note for interpreting the document, and put the document back into the work queue. This project includes webCemeteries.com processing no more than 5% of each document set in this manner. Flagged documents above that 5% figure will be identified as exceptions for data cleanup, and are outside the scope of this project. Flagged documents that the client does not review and comment on, or flagged documents that cannot be entered after one round of client review will also be considered to be identified as exceptions for data cleanup and fall outside the scope of this project. Depending on the nature of these documents that are identified as exceptions for data cleanup, the client may opt to have them quoted as a separate follow-up project. Given the nature of the documents that are to be used for this project, the quality of the written records, the inconsistencies in the location fields, among other variables, it is expected that there will be a considerable number of records that will need internal interpretation, and it should also be expected that there may be a number of errors and/or typos in the database that is delivered to the client. Quality control measures will be employed to minimize the rate of errors.

6. Upon completion of the data entry and review by the client, webCemeteries.com will provide the data along with the linked images back to Pontem for import to the software. A quote from Pontem will be needed for this import.

Service/Product	Price
Linking and entering Lot diagrams	\$6,902.89
Linking and entering Owner cards	\$4,596.76
Linking and entering Interment Ledgers	\$6,041.06
Total	\$16,985.22
Project management costs included in price	

Payment Terms: 50% Due Upon Order, 30% half way through, and 20% upon completion

This proposal and the use of the webCemeteries.com program include all the Terms of Use stated on the webCemeteries.com site, and those Terms of Use are hereby incorporated by reference and are an integral part of this proposal. By signing, this proposal the person signing below represents that he/she has the full authority to do so and acknowledges that he/she intends to create a legally binding contract with Vast Data Concepts, LLC including all incorporated Terms of Use. This proposal includes entering the data as presented, not reconciling any errors or contradictions in the data. Any records that require internal interpretation will be flagged to be entered by the client. The prices are based on the estimated number of records, and may be different if the actual number of records is different. Quality control measures will be followed by webCemeteries.com during the data entry process to minimize any clerical errors and flag any records that require internal review by the client, but clerical errors are still likely to exist in the final database. The client will also be responsible for reviewing the data via a web-based portal throughout the data entry process. Upon completion of each phase of the data entry process, the client will have ten (10) work days to complete their review of the data and sign off on the final data import. Any errors not flagged during the review process will be the responsibility of the client, and will be corrected by the client within the final user application. This document reflects the way webCemeteries.com operates at the time of its writing. webCemeteries.com reserves the right to make improvements and changes as required for increased customer satisfaction.

Purchaser: City of Lake Geneva Signed:  Date: 2/10/16
Mayor



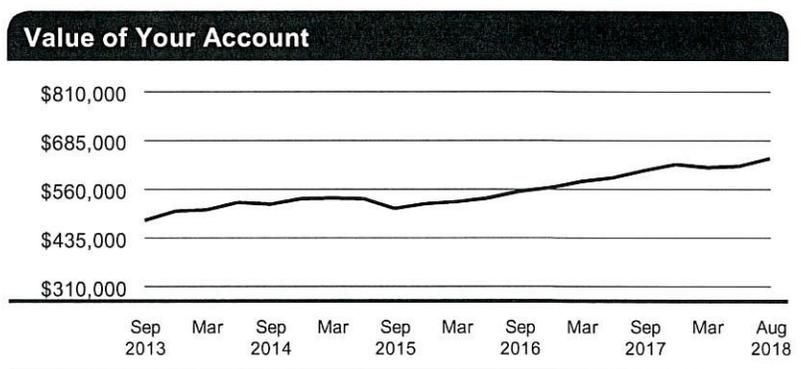
OAK HILL CEMETERY
ATTN COMPROLLER
626 GENEVA ST
LAKE GENEVA WI 53147-1914

Searching for Stock Ideas?

If you're looking for the potential for long-term growth, the Edward Jones Stock Focus List is a great place to start your search. The list includes stocks of large companies across a variety of industries that our research analysts believe can provide investors with solid return potential over a number of years. Your financial advisor can provide you with a copy of the Stock Focus List and help you determine which stocks may be appropriate for you.

Corporate

Account Value	
\$640,172.09	
1 Month Ago	\$634,663.18
1 Year Ago	\$599,132.84
3 Years Ago	\$520,334.67
5 Years Ago	\$467,320.42



Value Summary		
	This Period	This Year
Beginning Value	\$634,663.18	\$624,642.95
Assets Added to Account	0.00	3,850.00
Assets Withdrawn from Account	-680.62	-1,750.94
Fees and Charges	0.00	0.00
Change In Value	6,189.53	13,430.08
Ending Value	\$640,172.09	

For more information regarding the Value Summary section, please visit www.edwardjones.com/mystatementguide.



Summary of Assets (as of August 31, 2018)

	Value as of 08/31	Value as of 07/28	Dollar Change	% of Total Value
Assets Held at Edward Jones				
Mutual funds	640,172.09	634,663.18	5,508.91	100.0%
Total at Edward Jones	\$640,172.09	\$634,663.18	\$5,508.91	100%
Account Value	\$640,172.09	\$634,663.18	\$5,508.91	

Summary of Income

Income distributions from securities	This Period			This Year		
	Taxable	Tax-free	Total	Taxable	Tax-free	Total
Dividends						
Qualified (Q)*				\$1,755.20		\$1,755.20
Partially Qualified (P)*	23.54		23.54	1,530.63		1,530.63
Nonqualified (N)**	657.08		657.08	4,520.07		4,520.07
Capital gain distributions	147.15		147.15	1,934.25		1,934.25
Total	\$827.77		\$827.77	\$9,740.15		\$9,740.15
Other distributions or charges						
	This Period			This Year		
Income reported in prior year						\$1,070.32
Total						\$1,070.32

*Reduced Tax Eligible

**Taxable

Note: Your year-end tax documents (eg. Form 1099) will provide specific classifications of your income distributions. Qualified (Q) dividends may be taxed at reduced rates. Nonqualified (N) dividends may be taxed at ordinary rates. A portion of your Partially Qualified (P) dividends may also be taxed at reduced rates. Edward Jones, its employees and financial advisors cannot provide tax or legal advice. You should review your specific situation with your tax or legal professionals.

Asset Details (as of Aug 31, 2018)

additional details at www.edwardjones.com/access

Assets Held At Edward Jones

Mutual Funds	Price	Quantity	Value
American Bond Fund of America CIA Symbol: ABNDX Asset Category: Income	\$12.57	3,796.608	\$47,723.36



Asset Details (continued)

Mutual Funds	Price	Quantity	Value
American Capital Income Builder CI A Symbol: CAIBX Asset Category: Growth & Income	60.55	611.296	37,013.97
American Capital World Bond CI A Symbol: CWBFX Asset Category: Income	19.37	1,205.942	23,359.10
American Fundamental Investors CI A Symbol: ANCFX Asset Category: Growth & Income	64.98	640.979	41,650.82
American Growth Fund of America CI A Symbol: AGTHX Asset Category: Growth & Income	56.31	194.639	10,960.12
American High-Income Trust CI A Symbol: AHITX Asset Category: Aggressive Income	10.23	2,306.022	23,590.61
American Income Fund of America CI A Symbol: AMECX Asset Category: Growth & Income	23.31	2,478.334	57,769.97
American Intermediate Bond Fund of America CI A Symbol: AIBAX Asset Category: Income	13.14	3,562.137	46,806.48
American Investment Company of America CI A Symbol: AIVSX Asset Category: Growth & Income	41.67	464.12	19,339.88
American Washington Mutual Investors CI A Symbol: AWSHX Asset Category: Growth & Income	46.60	830.955	38,722.50
Lord Abbett Affiliated CI A Symbol: LAFFX Asset Category: Growth & Income	16.31	2,954.855	48,193.69
Lord Abbett Bond Debenture CI A Symbol: LBNDX Asset Category: Aggressive Income	8.04	3,715.62	29,873.58
Lord Abbett Calibrated Dividend Growth CI A Symbol: LAMAX Asset Category: Growth & Income	16.05	3,998.322	64,173.07



Asset Details (continued)

Mutual Funds	Price	Quantity	Value
Lord Abbett Core Fixed Income CI A Symbol: LCRAX Asset Category: Income	10.56	4,048.778	42,755.10
Lord Abbett Fundamental Equity CI A Symbol: LDFVX Asset Category: Growth & Income	13.31	1,222.868	16,276.37
Lord Abbett International Dividend Income CI A Symbol: LIDAX Asset Category: Growth & Income	7.23	691.719	5,001.13
Lord Abbett Multi-Asset Balanced Opportunity CI A Symbol: LABFX Asset Category: Growth & Income	12.02	2,645.374	31,797.40
Lord Abbett Total Return CI A Symbol: LTRAX Asset Category: Income	10.03	5,499.994	55,164.94
Total Account Value			\$640,172.09

Summary of Realized Gain/Loss

	This Year
Short Term (assets held 1 year or less)	\$0.00
Long Term (held over 1 year)	14,667.04
Total	\$14,667.04

Summary totals may not include proceeds from uncosted securities or certain corporate actions.

Summary of Other Products and Services

Loans and Credit	Account Number	Balance	Approved Credit	Available Credit	Interest Rate
Amount of money you can borrow for Oak Hill Cemetery	930-13558-1-5	\$0.00	\$320,086*	\$320,086	5.75%

* Your approved credit is not a commitment to loan funds. It is based on the value of your investment account which could change daily. The amount you may be eligible to borrow may differ from your approved credit. Borrowing against securities has its risks and is not appropriate for everyone. If the value of your collateral declines, you may be required to deposit cash or additional securities, or the securities in your account may be sold to meet the margin call. A minimum account value is required if you have loan features on your account. Your interest will begin to accrue from the date of the loan and be charged to the account. Your interest rate will vary depending on the assets under care of your Edward Jones Pricing Group. For more information on how your interest rate is calculated, contact your financial advisor or please visit: www.edwardjones.com/disclosures/marginloans



Summary of Activity

Beginning Balance of Cash, Money Market funds and Insured Bank Deposit			\$0.00
	Additions	Subtractions	
Income	\$827.77		
Total Additions			\$827.77
Withdrawals to Purchase Securities		-\$147.15	
Other Withdrawals and Transfers Out		-680.62	
Total Subtractions			-\$827.77
Ending Balance of Cash, Money Market funds and Insured Bank Deposit			\$0.00

Detail of Activity by Category

Additions - Income	Date	Where Invested	Quantity	Amount per share/rate	Amount
Dividends					
Lord Abbett Bond Debenture A at Daily Accrual Rate Tax Info N	8/01	Check	3,697.18		\$107.99
La Multi-Asset Bal Opport A Tax Info P	8/01	Check	2,645.374	0.008	23.54
Lord Abbett Total Return A at Daily Accrual Rate Tax Info N	8/01	Check	5,499.994		154.88
Lord Abbett Core Fixed Inc A at Daily Accrual Rate Tax Info N	8/01	Check	4,048.778		113.25
American Int BD Fd of Amer A at Daily Accrual Rate Tax Info N	8/01	Check	3,562.137		71.29
American Bond Fund of Amer A at Daily Accrual Rate Tax Info N	8/01	Check	3,796.608		94.92
American High-Income Trust A at Daily Accrual Rate Tax Info N	8/01	Check	2,306.022		114.75
Short Term Cap Gains					
Lord Abbett Bond Debenture A	8/01	Reinvested	3,697.18	0.039	147.15
Subtractions - Withdrawals to Purchase Securities					
	Date	Source of Funds	Quantity	Amount per share/rate	Amount
Reinvestments					
Reinvestment into Lord Abbett Bond Debenture A	8/01	Income	18.44	7.98	-147.15
Subtractions - Other Withdrawals and Transfers Out					
	Date	Source of Funds	Quantity	Amount per share/rate	Amount
Income Check # 94493365	8/01	Income			-680.62



About Edward Jones

Edward D. Jones & Co., L.P. is dually registered with the SEC as a broker-dealer and an investment adviser. Edward Jones is also a member of FINRA.

Statement of Financial Condition — Edward Jones' statement of financial condition is available for your personal review at www.edwardjones.com/en_US/company/index.html, at your local branch, or by mail upon written request.

About Your Account

Account Information — Your account agreement(s) contain the conditions that govern your account. Please contact your financial advisor if you have any changes to your financial situation, contact information or investment objectives.

Account Accuracy — Please review your statement carefully. If you believe there are errors on your account, you must notify us promptly of your concerns. You may either contact our Client Relations department or your financial advisor. You should re-confirm any oral communication by sending us a letter within 30 days to protect your rights, including your rights under the Securities Investor Protection Act (SIPA).

Errors or Questions about your Electronic Transfers — Contact Client Relations at (800) 441-2357.

Complaints about Your Account — If you have a complaint please call (800) 441-2357 or send a letter to Edward Jones, Attn: Complaints Dept., 12555 Manchester Rd. St. Louis, MO 63131.

Pricing — For the most current prices of the investments you own, contact your financial advisor or visit Online Access.

Third Parties — While we believe our pricing information is reliable, some pricing information is provided by third parties and we cannot guarantee its accuracy.

Systematic and Money Market Transactions — Additional transaction details may be available upon written request to Edward Jones, Attn: Trade Operations Dept.

Withholding on Distributions or Withdrawals — Federal law requires Edward Jones to withhold income tax on distribution(s) from your retirement accounts and other plans unless you elect not to have withholding apply. You may elect a percentage to be withheld from your distribution or not to have the withholding apply by signing and dating the appropriate form and returning it to the address specified on the form. Your election will remain in effect until you change or revoke it by returning another signed and dated form. If you do not return the form by the date your distributions are scheduled to begin, Federal income tax will be withheld. If you do not have enough income tax withheld from your distributions, you may need to pay estimated tax. You may incur penalties if the amounts withheld and your estimated tax payments are not equal to the tax you owe. State withholding, if applicable, is subject to the state's withholding requirements.

Fees and Charges — The "Fees and charges" amount shown in your Value Summary includes all activity fees and margin loan interest, except the dividend reinvestment fee and trade transaction fee. The dividend reinvestment fee is reflected in the detailed activity section of this statement. The "Fees and charges" amount does not include commissions or mark-ups from the purchase of specific investments.

Fair Market Value for Individual Retirement Accounts Your fair market value as of December 31st will be reported to the IRS as required by law.

Rights to Your Money Market Fund, Bank Deposit and Free Credit Balances — Your free credit balances are payable on demand. You may require us to liquidate your bank deposit or money market fund balance. We will then disburse the proceeds to you or place them in your securities account. Your instructions must be made during normal business hours and are subject to terms and conditions of the account agreement(s).

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