

# APPROPRIATIONS CONTRACT

---

**THIS CONTRACT** is signed on \_\_\_\_\_, by the City of Pompano Beach (“City”) and JUNIOR ACHIEVEMENT OF SOUTH FLORIDA, INC., a Not For Profit Corporation authorized to do business in the State of Florida (“Recipient”).

**WHEREAS**, the City of Pompano Beach has appropriated for its current Fiscal Year 2021-22 (October 1st through September 30th), the sum of \$7,500 to Recipient, to conduct a program entitled or activity as described in Exhibit “A” Recipients Requirements, Contractual Responsibilities and Program Description” (collectively the “Work”) attached hereto and incorporated herein by reference, for the period beginning October 1, 2021 and ending September 30, 2022; and

**WHEREAS**, the City Commission finds that entering into this Contract serves a valid public purpose as Recipients shall perform or provide a service that is beneficial to the residents of the City, and that the City is currently not in a position to provide such services on its own; and

**WHEREAS**, it is in the best interest of the City to enter into this contract with Recipient to provide the Work hereunder in accordance with the terms and conditions set forth herein; and

**NOW, THEREFORE**, in consideration of those mutual promises and the terms and conditions set forth hereafter, the parties agree as set forth below.

1. *Contract Documents.* This Contract consists of Exhibit A, “Recipients Requirements, Contractual Responsibilities and Program Description”; Exhibit B, “Payment Schedule”; and Exhibit C, “Insurance Requirements” attached hereto, made a part hereof and incorporated herein, and all written change orders and modifications issued and approved by the City after execution of this Contract.

2. *Term of Contract.* This Contract shall be for the period beginning October 1, 2021 and ending September 30, 2022.

3. *Renewal.* This Contract is not subject to renewal.

4. *City’s Maximum Obligation.* City agrees to pay Recipient the aforementioned sum to provide the Work. Both parties agree that unless otherwise directed by City in writing, Recipient shall continue to provide the Work during the term of this Contract.

5. *Payment of Program.* City shall pay Recipient for performance of the Work in accordance with Payment Schedule set forth in Exhibit B.

6. *Disputes.* Any factual disputes between City and the Recipient in regard to this Contract shall be directed to the City Manager for the City whose decision shall be final.

7. *Contract Administrators, Notices and Demands.*

A. *Contract Administrators.* During the term of this Contract, the City's Contract Administrator shall be the City Manager or his/her written designee and Recipient's Contract Administrator shall be Linda Lynch or his/her written designee.

B. *Notices and Demands.* A notice, demand or other communication hereunder by either party to the other shall be effective if it is in writing and sent via email, facsimile, registered or certified mail, postage prepaid to the representative(s) named below or is addressed and delivered to such other authorized representative at the address as that party from time to time may designate in writing and forward to the other as provided herein.

**If to Recipient:** Linda Lynch  
Grants and Government Relations Manager  
1130 Coconut Creek Boulevard  
Coconut Creek, FL 33066  
Office: (954) 979-7100  
Email: linda@jasouthflorida.org

**If to City:** Greg Harrison, City Manager  
100 W Atlantic Blvd.  
Pompano Beach, FL 33060  
Office: (954) 786-4601  
Email: greg.harrison@copbfl.com

8. *Ownership of Documents and Information.* All information, data, reports, plans, procedures or other proprietary rights in all items, developed, prepared, assembled or compiled by Recipient as required for the Work hereunder, whether complete or unfinished, shall be owned by City without restriction, reservation or limitation of their use and made available at any time and at no cost to City upon reasonable written request for use and/or distribution as City deems appropriate provided City has compensated Recipient in accordance with the terms set forth herein. City's re-use of Recipient's Work product shall be at its sole discretion and risk if done without Recipient's written permission. Upon completion of all Work contemplated hereunder or termination of this Contract, Recipient shall promptly provide City's Contract Administrator copies of all of the above Work documents upon written request. Recipient may not disclose, use, license or sell any Work developed, created or otherwise originated hereunder to any third party whatsoever. The rights and obligations created under this paragraph shall survive termination or expiration of this Contract.

To the extent it is necessary for Recipient to perform the Work, City shall provide any information, data and reports in its possession to Recipient free of charge.

9. *Termination.* City shall have the right to terminate this Contract, in whole or in part, for cause, default or negligence on Recipient's part, upon ten (10) business days advance written notice to Recipient. Such Notice of Termination may include City's requests for certain product documents and materials, and other provisions regarding the Program.

If there is any material breach or default in Recipient's performance of any covenant or obligation hereunder which has not been remedied within ten (10) business days after

City's written Notice of Termination, City, in its sole discretion, may terminate this Contract immediately and Recipient shall not be entitled to receive further payment from the effective date of the Notice of Termination.

In the event the City fails for any reason to appropriate funds for this Contract, it shall be deemed terminated and City shall provide Recipient with ten (10) business days written notice. Upon receipt of said notice, Recipient shall be responsible for any and all expenses and/or legal obligations made after receipt of City's written notice from the City.

10. *Force Majeure.* Neither party shall be obligated to perform any duty, requirement or obligation hereunder if such performance is prevented by fire, hurricane, earthquake, explosion, war, civil disorder, sabotage, accident, flood, acts of nature or by any reason of any other matter or condition beyond the control of either party which cannot be overcome by reasonable diligence and without unusual expense ("Force Majeure"). In no event shall economic hardship or lack of funds be considered an event of Force Majeure. Additionally, should funds not be utilized, and services or programs not provided within the specific required time period in this Contract due to circumstances outside the control of Recipient, including but not limited to, a Force Majeure event, City is under no obligation to amend or extend this Contract to provide the approved funding past the expiration of the performance period set forth in this Contract. Any amendment to this Contract for such purposes shall be at City's sole discretion, based upon its budget, available funds, and other factors it may deem relevant.

Recipient must follow all Federal, State, County, and City safety guidelines, including all CDC safety guidelines in effect during the term of the program, including but not limited to social distancing, and personal protection equipment. Inability to conduct the program and follow any and all required safety guidelines from the COVID-19 crisis or other similar emergency, or failure to follow such requirements, including but not limited to, social distancing, shall constitute grounds for immediate cancellation of this Agreement unilaterally by the City upon written notice, which may be provided via electronic mail.

11. *Insurance.* Recipient shall maintain insurance in accordance with Exhibit C throughout the term of this Contract.

12. *Indemnification.* Except as expressly provided herein, no liability shall attach to the City by reason of entering into this Contract.

A. Recipient shall at all times indemnify, hold harmless and defend the City, its officials, employees, volunteers and other authorized agents from and against any and all claims, demands, suit, damages, attorneys' fees, fines, losses, penalties, defense costs or liabilities suffered by the City arising directly or indirectly from any act, breach, omission, negligence, recklessness or misconduct of Recipient and/or any of its agents, officers, or employees hereunder, including any inaccuracy in or breach of any of the representations, warranties or covenants made by the Recipient, its agents, officers and/or employees, in the performance of Work under this Contract. Recipient agrees to investigate, handle, respond to, provide defense for, and defend any such claims at its sole expense and to bear all other costs and expenses related thereto, even if the claim(s) is/are groundless, false or fraudulent. To the extent considered necessary by City, any sums due Recipient hereunder may be retained by City until all of City's claims for indemnification hereunder have been settled or otherwise resolved, and any amount withheld shall not be subject to payment or interest by City.

B. Recipient acknowledges and agrees that City would not enter into this Contract without this indemnification of City by Recipient. The parties agree that one percent (1%) of the total compensation paid to Recipient hereunder shall constitute specific consideration to Recipient for the indemnification provided under this Paragraph and these provisions shall survive expiration or early termination of this Contract.

13. *Sovereign Immunity.* Nothing in this Contract shall be construed to affect in any way the rights, privileges and immunities of the City and its agents as set forth in §768.28, Florida Statutes. Nothing herein shall be construed as consent from either party to be sued by third parties.

14. *Non-Assignability and Subcontracting.*

A. *Non-Assignability.* This Contract is not assignable and Recipient agrees it shall not assign or otherwise transfer any of its interests, rights or obligations hereunder, in whole or in part, to any other person or entity without City's prior written consent which must be sought in writing not less than fifteen (15) days prior to the date of any proposed assignment. Any attempt by Recipient to assign or transfer any of its rights or obligations hereunder without first obtaining City's written approval shall not be binding on City and, at City's sole discretion, may result in City's immediate termination of this Contract whereby City shall be released of any of its obligations hereunder. In addition, this Contract and the rights and obligations herein shall not be assignable or transferable by any process or proceeding in court, or by judgment, execution, proceedings in insolvency, bankruptcy or receivership. In the event of Recipient's insolvency or bankruptcy, City may, at its option, terminate and cancel this Contract without any notice of any kind whatsoever, in which event all rights of Recipient hereunder shall immediately cease and terminate.

B. *Subcontracting.* Prior to subcontracting for Work to be performed hereunder, Recipient shall be required to obtain the written approval of the City's Contract Administrator. If the City's Contract Administrator, in his/her sole discretion, objects to the proposed subcontractor, Recipient shall be prohibited from allowing that subcontractor to provide any Work hereunder. Although Recipient may subcontract Work in accordance with this Paragraph, Recipient remains responsible for any and all contractual obligations hereunder and shall also be responsible to ensure that none of its proposed subcontractors are listed on the *Convicted Vendors List* in accordance with the provisions of Paragraph 26 below.

15. *Performance Under Law.* Recipient, in performance of its duties under this Contract, agrees to comply with all applicable local, state and/or federal laws and ordinances including, but not limited to, standards of licensing, conduct of business and those relating to criminal activity.

16. *Audit and Inspection Records.* Recipient shall permit authorized representatives of the City to inspect and audit all data and records of the Recipient, if any, related to the Work being funded by this Contract until three (3) years after City's final payment under this Contract. Recipient agrees that such inspections and audits may include City's authorized representatives auditing Recipient's financial affairs at any time with no advance notice by City.

Recipient further agrees to include in all subcontracts hereunder a provision to the effect that the subcontractor agrees that City or any of its duly authorized representatives shall,

until **three (3) years after City's final payment to Recipient**, have access to and the right to examine any books, documents, papers and records of such subcontractor attendant to any subcontracted Work provided hereunder.

In the event Recipient receives fifty thousand dollars (\$50,000.00) or more from the City, the City reserves the right to request a copy of a Grant Auditing Report conducted in accordance with the Government Auditing Standards issued by the United States Comptroller General and the provisions of OMB Circular A-133 issued by the Office of Management and Budget, Executive Office of the President. If such a request is made by the City, all grant funds shall be shown via explicit disclosure in the annual financial statements and/or the accompanying notes to the financial statement. Upon City's written request, this Report shall be due within 120 days of the close of the City's fiscal year.

17. *Adherence to Law.* Both parties shall adhere to all applicable laws governing their relationship with their employees including, but not limited to, laws, rules, regulations and policies concerning worker's compensation, unemployment compensation and minimum wage requirements.

18. *Independent Contractor.* Recipient shall be deemed an independent contractor for all purposes, and employees of Recipient and all its contractors, subcontractors and the employees thereof, shall not in any manner be deemed to be employees of the City. As such, the employees of Recipient, its contractors or subcontractors, shall not be subject to any withholding for tax, social security or other purposes by City, nor shall such contractor, subcontractor or employee be entitled to sick leave, pension benefits, vacation, medical benefits, life insurance, workers or unemployment compensation or the like from City. Furthermore; nothing in this Contract shall be deemed to constitute or create a joint venture, partnership, pooling arrangement or other form of business entity between Recipient and City.

19. *Mutual cooperation.* Recipient recognizes its performance of Work hereunder is essential to the provision of vital public services and the accomplishment of the stated goals and mission of City. Therefore, Recipient shall be responsible to maintain a cooperative and good faith attitude in all relations with City and the public and shall actively foster a public image of mutual benefit to both parties. Recipient shall not make any statements or take any actions detrimental to this effort.

20. *Public Records.*

A. The City of Pompano Beach is a public agency subject to Chapter 119, Florida Statutes. The Recipient shall comply with Florida's Public Records Law, as amended. Specifically, the Recipient shall:

1. Keep and maintain public records required by the City in order to perform the service.

2. Upon request from the City's custodian of public records, provide the City with a copy of requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in Chapter 119, Florida Statutes or as otherwise provided by law.

3. Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the contract term and following completion of the Contract if Recipient does not transfer the records to the City.

4. Upon completion of this Contract, transfer, at no cost to City, all public records in its possession or keep and maintain public records required by the City as required hereunder. If Recipient transfers all public records to the City upon completion of this Contract, Recipient shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If Recipient keeps and maintains public records upon completion of this Contract, Recipient shall meet all applicable requirements for retaining public records. Upon request from the City's custodian of public records, all records stored electronically by Recipient must be provided to the City in a format that is compatible with the information technology systems of the City.

B. Failure of the Recipient to provide the above described public records to the City within a reasonable time may subject Recipient to penalties under §119.10, Florida Statutes, as amended.

## **PUBLIC RECORDS CUSTODIAN**

**IF THE RECIPIENT HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE RECIPIENT'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT:**

### **CITY CLERK**

**100 W. Atlantic Blvd., Suite 253**

**Pompano Beach, Florida 33060**

**(954) 786-4611**

**[RecordsCustodian@copbfl.com](mailto:RecordsCustodian@copbfl.com)**

21. *Governing Law.* Agreement must be interpreted and construed in accordance with and governed by the laws of the State of Florida. The exclusive venue for any lawsuit arising from, related to, or in connection with this Agreement will be in the state courts of the Seventeenth Judicial Circuit in and for Broward County, Florida. If any claim arising from, related to, or in connection with this Agreement must be litigated in federal court, the exclusive venue for any such lawsuit will be in the United States District Court or United States Bankruptcy Court for the Southern District of Florida. BY ENTERING INTO THIS AGREEMENT, THE PARTIES HEREBY EXPRESSLY WAIVE ANY RIGHTS EITHER PARTY MAY HAVE TO A TRIAL BY JURY OF ANY CIVIL LITIGATION RELATED TO THIS AGREEMENT.

22. *Waiver and Modification.*

A. No waiver made by either party with respect to performance, manner, time, or any obligation of either party or any condition hereunder shall be considered a waiver of that party's rights with respect to the particular obligation or condition beyond those expressly waived in writing or a waiver of any other rights of the party making the waiver or any other obligations of the other party.

B. No Waiver by Delay. The City shall have the right to institute such actions or proceedings as it may deem desirable for effectuating the purposes of this Contract provided that any delay by City in asserting its rights hereunder shall not operate as a waiver of such rights or limit them in any way. The intent of this provision is that City shall not be constrained to exercise such remedy at a time when it may still hope to otherwise resolve the problems created by the default or risk nor shall any waiver made by City with respect to any specific default by Recipient be considered a waiver of City's rights with respect to that default or any other default by Recipient.

C. Either party may request changes to modify certain provisions of this Contract; however, unless otherwise provided for herein, any such changes must be contained in a written amendment executed by both parties with the same formality of this Contract.

23. *No Contingent Fee.* Recipient warrants that other than a bona fide employee working solely for Recipient, Recipient has not employed or retained any person or entity, or paid or agreed to pay any person or entity, any fee, commission, gift or any other consideration to solicit or secure this Contract or contingent upon or resulting from the award or making of this Contract. In the event of Recipient's breach or violation of this provision, City shall have the right to terminate this Contract without liability and, at City's sole discretion, to deduct from the Payment Schedule set forth in Exhibit B or otherwise recover the full amount of such fee, commission, gift or other consideration.

24. *Attorneys' Fees and Costs.* In the event of any litigation involving the provisions of this Contract, both parties agree that the prevailing party in such litigation shall be entitled to recover from the non-prevailing party reasonable attorney and paraprofessional fees as well as all out-of-pocket costs and expenses incurred thereby by the prevailing party in such litigation through all appellate levels.

25. *No Third-Party Beneficiaries.* Recipient and City agree that this Contract and other contracts pertaining to Recipient's performance hereunder shall not create any obligation on Recipient or City's part to third parties. No person not a party to this Contract shall be a third-party beneficiary or acquire any rights hereunder.

26. *Public Entity Crimes Act.* As of the full execution of this Contract, Recipient certifies that in accordance with §287.133, Florida Statutes, it is not on the *Convicted Vendors List* maintained by the State of Florida, Department of General Services. If Recipient is subsequently listed on the *Convicted Vendors List* during the term of this Contract, Recipient agrees it shall immediately provide City written notice of such designation in accordance with Paragraph 7 above.

27. *Entire Contract.* This document incorporates and includes all prior negotiations, correspondence, conversations, contracts or understandings applicable to the matters contained herein, and the parties agree that there are no commitments, contracts or understandings concerning the subject matter of this Contract that are not contained in this document. Accordingly, it is agreed that no deviation from the terms hereof shall be predicated upon any prior representations or contracts, whether oral or written.

28. *Headings.* The headings or titles to Articles of this Contract are not part of the Contract and shall have no effect upon the construction or interpretation of any part of this Contract.

29. *Counterparts.* This Contract may be executed in one or more counterparts, each of which shall be deemed an original, but all of which together shall constitute one and the same instrument. A photocopy, email or facsimile copy of this Contract and any signatory hereon shall be considered for all purposes as original.

30. *Approvals.* Whenever City approval(s) shall be required for any action under this Contract, said approval(s) shall not be unreasonably withheld.

31. *Absence of Conflicts of Interest.* Both parties represent they presently have no interest and shall acquire no interest, either direct or indirect, which would conflict in any manner with their performance under this Contract and that no person having any conflicting interest shall be employed or engaged by either party in their performance hereunder.

32. *Binding Effect.* The benefits and obligations imposed pursuant to this Contract shall be binding and enforceable by and against the parties hereto.

33. *Severability.* Should any provision of this Contract or the applications of such provisions be rendered or declared invalid by a court action or by reason of any existing or subsequently enacted legislation, the remaining parts of provisions of this Contract shall remain in full force and effect.

**THE REMAINDER OF THE PAGE IS INTENTIONALLY LEFT BLANK**



**“CITY”:**

**IN WITNESS WHEREOF**, the parties hereto have caused this Agreement to be executed the day and year hereinabove written.

**CITY OF POMPANO BEACH**

By: \_\_\_\_\_  
REX HARDIN, MAYOR

By: \_\_\_\_\_  
GREGORY P. HARRISON, CITY MANAGER

Attest:

\_\_\_\_\_  
ASCELETA HAMMOND  
CITY CLERK

(SEAL)

Approved As To From:

\_\_\_\_\_  
MARK E. BERMAN  
CITY ATTORNEY

**"RECIPIENT"**

JUNIOR ACHIEVEMENT OF SOUTH FLORIDA, INC.  
(Print or type name of company here)

Witnesses:

Debbie Fairholm

Debbie Fairholm  
(Print or Type Name)

OC

CASEY DELLAPENNA  
(Print or Type Name)

By: Laurie Sallarulo

Print Name: LAURIE SALLARULO

Title: PRESIDENT/CEO

Business License No. 59-0871446

STATE OF FLORIDA

COUNTY OF Broward

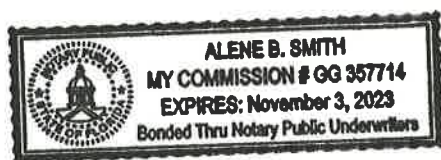
The foregoing instrument was acknowledged before me, by means of ☒ physical presence or ☐ online notarization, this 13 day of September, 2021, by LAURIE SALLARULO as PRESIDENT/CEO of JUNIOR ACHIEVEMENT OF SOUTH FLORIDA, INC., a Florida non for profit corporation. She is personally known to me or who has produced identification (type of identification) as identification.

NOTARY'S SEAL:

Alene B Smith  
NOTARY PUBLIC, STATE OF FLORIDA

Alene B Smith  
(Name of Acknowledger Typed, Printed or Stamped)

GG357714  
Commission Number



## **Exhibit “A”**

### **Recipients Requirements, Contractual Responsibilities and Program Description**

1. RECIPIENT agrees to do as follows:

- a) To accept the funds as appropriated in accordance with the terms of this Contract; and
- b) If RECIPIENT intends on obtaining matching funds from another source at the time of the application for the CITY grant, the CITY reserves the right to request a copy of the matching fund contract along with a financial report; and
- c) Prior to the award of any CITY funds, RECIPIENT shall provide documentation substantiating that RECIPIENT’s corporation/organization falls within Section 501(c)(3) and Section 501(A) of the Internal Revenue Code and a W9 form; and
- d) To abide by Chapter 119, Florida Statutes, as from time to time amended, and to comply with all applicable federal, state, county and municipal laws, ordinances, codes and regulations. Any difference between the above federal, state, county or municipal guidelines or regulations and this Contract shall be resolved in favor of the more restrictive guidelines; and
- e) To utilize allotted funds under this Contract for the sole purpose set forth in this Contract – FRAUDULENT USE OF CITY FUNDS SHALL RESULT IN THE TERMINATION OF THIS CONTRACT AND THE RECIPIENT SHALL BE OBLIGATED TO RETURN ALL THE FUNDS AWARDED BY THIS CONTRACT. IN ADDITION, THE CITY RESERVES ANY AND ALL RIGHTS AFFORDED UNDER THE LAW INCLUDING PROSECUTION FOR SUCH FRAUDULENT USE OF CITY FUNDS IN A COURT OF COMPETENT JURISDICTION. ALL UNSPENT FUNDS MUST BE RETURNED TO THE CITY; and
- f) To return to the CITY within fifteen (15) days of demand all CITY funds paid to said RECIPIENT under the terms of this Contract upon the finding that the terms of any contract executed by the RECIPIENT of the provisions or any applicable ordinance or law have been violated by the RECIPIENT; and
- g) To return to the CITY all funds expended for disallowed expenditures as determined by the CITY which includes, but not limited to:
  - i. Personal digital assistants (PDAs), cell phones, smartphones, and similar devices
  - ii. Service costs to support PDAs, cell phones, smartphones, and similar devices such as wireless services and data plans
  - iii. Proposal preparation including the costs to develop, prepare or write the proposal
  - iv. Pre-award costs
  - v. Out-of-state travel; non-local travel expenses
  - vi. Gift cards
  - vii. Purchase/lease of facilities or vehicles (e.g., buildings, buses, vans, cars)
  - viii. Rentals – one day only (written justification and approval needed for additional time)

- ix. Entertainment – exceptions shall be made for community events (written justification and approval needed prior)
- x. Land acquisition
- xi. Furniture
- xii. Honorariums for presenters/speakers and any costs associated with travel expenses
- xiii. Kitchen appliances (e.g., refrigerators, microwaves, stoves, tabletop burners)
- xiv. Tuition/Scholarships
- xv. Capital improvements and permanent renovations (e.g., playgrounds, buildings, fences, wiring)
- xvi. Clothing or uniforms (written justification and approval needed)
- xvii. Project banquets/luncheons
- xviii. Costs for items/services already covered by indirect costs allocation (supplanting)
- xix. Out of state college tours
- xx. Out of county field trips
- xxi. Alcohol
- xxii. Airfare
- xxiii. Boat rentals
- xxiv. Family incentives
- xxv. Car mileage
- xxvi. Stipends
- xxvii. Payroll taxes
- xxviii. Laboratory fees
- xxix. Computers
- xxx. Health benefits
- xxxi. Appliances and home goods (written justification and approval needed)
- xxxii. Digital Cameras
- xxxiii. Plaques
- xxxiv. Hotel Costs
- xxxv. Housing - (written justification and approval needed based on programming)

h) To maintain books, records and documents in accordance with generally accepted accounting procedures and practices to maintain adequate internal controls which, relating to the project(s), sufficiently and properly reflect all expenditures of funds provided by the CITY under this Contract; and

2) RECIPIENT agrees to provide the City Manager's Office or designee with a quarterly narrative and financial progress report, if applicable, on the program or activity described in Exhibit "A" Recipients Requirements, Contractual Responsibilities and Program Description.

Such reports shall include basic statistical information relative to the program or activity and a statement of expenditures made in each budget category and line item identified in the budget which is included in Exhibit "A" Recipients Requirements, Contractual Responsibilities and Program Description.

RECIPIENT shall receive the first wave of funding upon approval by the City Commission. A narrative and financial report shall be due on the dates listed below, as applicable.

However, following the completion of the first narrative and financial report and as indicated in Exhibit "B" Payment Schedule, the remaining distribution payment to the RECIPIENT shall be contingent upon prior receipt of the required progress narrative and financial report which is due during the preceding quarter. Narrative and financial reports for recipients receiving quarterly or monthly payments as indicated in Exhibit "B" Payment Schedule shall be due no later than the following dates:

1st Quarterly Narrative & Financial Report (October/November/December) - February 1st

2nd Quarterly Narrative & Financial Report (January/February/March) - May 1st

3rd Quarterly Narrative & Financial Report (April/May/June) - August 1st

4th Quarterly Narrative & Financial Report (July/August/September) - September 30<sup>th</sup>

If RECIPIENT receives a lump sum payment for a one-time event or an award amount of \$5,000 or less then the RECIPIENT shall be required to submit their narrative and financial report on a due date above as assigned by the CITY at a later date. The due date shall occur after the program or activity described in Exhibit "A" Recipients Requirements, Contractual Responsibilities and Program Description has concluded.

However, if any of the above dates fall on a weekend, then the due date shall be extended to the next business day, thereafter, as long as it does not exceed the term of this contract.

When submitting the quarterly narrative reports, RECIPIENT shall track and report to the CITY the following:

- a. Current and final outcomes for the program based on the objectives provided in the RECIPIENT's grant application
- b. Include all available statistics and/or numbers regarding the demographics of individuals served by the program; such as the number of CITY of Pompano Beach residents served (include tracking method used)
  - i. Age
  - ii. Race
  - iii. Gender
  - iv. Zip Codes
  - v. Household income (if applicable)
- c. Describe accomplishments of the program to date
- d. Summary of the impact the program has had on its intended target audience; to include challenges faced, photographs of the project and success stories (How did the CITY's funding make a difference in a resident/recipient's life?)

Failure to provide the quarterly narrative reports shall render an organization ineligible to receive future payouts.

- 3) The approved budget for the RECIPIENT, included in Exhibit "A" Recipients Requirements, Contractual Responsibilities and Program Description and any changes in the budget which would affect expenditure of funds provided under the terms of this contract, must be approved in writing by the City Manager or his/her designee prior to the expenditure of such funds; provided, that nothing herein shall authorize or allow any expenditure or obligation of funds in excess of the total sum aforesaid.

RECIPIENT shall submit financial reports with all required documentation of expenditures (including original receipts/proofs of payments and itemized list).

Failure to provide a narrative and financial report as assigned by the CITY and/or failure to utilize all of the prior allocated funds from the first six months of the contract shall render an organization ineligible to receive additional payouts and render the organization ineligible for current and future funding from the CITY.

Failure from the RECIPIENT to provide a Quarterly or Final narrative or Monthly, Quarterly or Lump Sum, financial report shall forfeit all outstanding project funding and shall render the RECIPIENT ineligible for additional funding from the CITY.

- 4) RECIPIENT agrees that any funds provided by the CITY for the operation of the program or activity during the current CITY's fiscal year, which are residual funds remaining unspent or unencumbered by any existing (not contingent) legal obligation shall be returned to the CITY.
- 5) RECIPIENT shall not use the CITY's logo, materials, or testimony for promotion of the RECIPIENT's program without written authorization from the CITY Manager or its designee.
- 6) RECIPIENTS shall attend a mandatory Orientation provided by the CITY at a date to be determined by the CITY. Failure to attend said Orientation shall be grounds for termination of the contract.
- 7) In cases where a contract is terminated by the CITY for default by RECIPIENT, the CITY reserves the right to deny RECIPIENT's future applications for new funding for a time to be determined by the City Manager, and/or his or her designee, and/or the City Commission.

Organization Name: JUNIOR ACHIEVEMENT OF SOUTH FLORIDA, INC.

Program Funded: JA Inspire

Amount Funded: \$7,500

Program Description: JA Inspire is an interactive career exploration program that introduces students to high growth/high wage career fields following 3 hours of career readiness curriculum. Students engage with JA Inspire volunteers at the career fair to create connections that allow them to build an understanding of the cross-section of high demand jobs available to them in the future, from mid-skilled trades to highly technical STEM related careers.

Form Name:	City of Pompano Beach Nonprofit Sponsorship Application
Submission Time:	April 15, 2021 11:05 am
Browser:	Chrome 89.0.4389.114 / Windows
IP Address:	64.57.202.90
Unique ID:	793006444
Location:	25.754100799561, -80.271003723145

## About Your Organization

---

Which Fiscal Year Is Your Organization Applying For?	2021-2022
--	-----------

---

Full Name of Nonprofit:	Junior Achievement of South Florida
-------------------------	-------------------------------------

---

Mission of Nonprofit:	Junior Achievement of South Florida's mission is to inspire and prepare youth to succeed in a global economy by training the next generation of business leaders, employees and consumers by educating students through financial literacy, entrepreneurship and workforce readiness programs.
-----------------------	--

---



**Brief Overview of Nonprofit:**

The mission of Junior Achievement of South Florida is fulfilled through over twenty volunteer-based K-12 programs provided in local classrooms and at the JA World Huizenga Center at the Lillian S. Wells Pavilion.

Approximately 60% of the children we serve are eligible for free/reduced priced lunches, though it varies per school. Last year we served over 54,000 K-12 students and filled more than 3,000 volunteer opportunities!

Junior Achievement of South Florida's twenty-plus K-12 programs address:

- **Work-readiness:** JA programs empower and prepare local students to succeed in the work force. Through volunteer mentors we educate students about employer expectations and real world work experiences. Students develop and strengthen the soft skills, technical skills, and interview skills needed to stand out.
- **Career Awareness:** Many JA programs let students "live in the adult world" for a day to explore careers and gain valuable insight and motivation to begin their own path to meaningful work.
- **Leadership Skills:** JA programs help students, particularly high school students, practice and utilize leadership skills, make critical decisions, learn from actual good and "not so good" decisions, and make meaningful philanthropic investments.
- **Drop Out Prevention:** JA programs reengage students and make school meaningful and even fun. While the estimated U.S. national graduation rate is 73%, the rate for JA students involved in a longitudinal study with two JA experiences is 93%, and those with 3+ JA experiences is 100%.
- **Financial Literacy:** JA programs can stop the cycle of financial illiteracy by providing fundamental knowledge that will be used for a lifetime.
- **Entrepreneurial Education:** Sparking the flame of business ownership can change a family's destiny and an entire community. JA lights the match for hundreds of students from families of all backgrounds.

---

<b>Nonprofit Website:</b>	www.jasouthflorida.org
---------------------------	------------------------

---

<b>Which Funding Priority Does Your Nonprofit Qualify For:</b>	Workforce Readiness
--	---------------------

---

<b>Type of Organization - select the one that best applies:</b>	Education/Research
---	--------------------

---

**Executive Summary of How Nonprofit  
will use City of Pompano Beach**

**Funding:**

Funding from the City of Pompano Beach will help provide ...

- JA BizTown in-class curriculum and culminating one-day simulation at JA World or a virtual experience with BizTown Adventures for approximately 795 fifth grade students from Charles Drew, Cresthaven, Cypress, Markham, McNab, Norcrest, Palmview, Pompano Beach, and Sanders Park Elementary Schools. Following in-class curriculum, students will complete JA BizTown or JA BizTown Adventures. JA BizTown Adventures is a virtual experience that provides an alternative to students who are unable to visit the on-site simulation. Similar to the on-site simulation, JA BizTown Adventures is a fully interactive, true-to-life, simulated town experience teaching students the fundamental relationship between academics and working for a living. Students will run the various businesses, earn paychecks, open/manage bank accounts, take out and repay business loans, vote, price and advertise goods and services for sale, and more. Students become full-fledged consumers by making purchases at other student-run businesses within the "town."
  - JA Finance Park in-class curriculum and culminating one-day simulation at JA World or a virtual experience for approximately 825 eighth grade students from Crystal Lake and Pompano Beach Middle Schools. Following 16-hours of in-class curriculum students will participate in JA Finance Park at JA World to explore career opportunities and create a 21-line-item budget based on an assigned individual profile, including career, family size, credit score, salary and student loans. If necessary, the JA Finance Park Virtual 2.0 Simulation will be available for students unable to attend the in-person simulation. The virtual simulation also give students the opportunity to explore career opportunities and create a 21-line-item budget based on an assigned individual profile, including career, family size, credit score, salary and student loans.
  - JA Inspire in-class curriculum and culminating JA Inspire Career Fair Day for approximately 597 eighth grade students from Crystal Lake and Pompano Beach Middle Schools on a date TBA at JA World Huizenga Center at Broward College. JA Inspire is a career pathways exploratory program that gets students to examine their individual interests to figure out where they want to be, and then connects students to local employers to open students' eyes to skills and coursework needed to get them there. If necessary, JA Inspire Virtual will be offered to students upon completion of the in-class curriculum. JA Inspire Virtual gives students the opportunity to learn about South Florida's high wage/high demand jobs and exposes them to career and networking opportunities prior to deciding what career path they choose.
-

## **How Does Your Nonprofit/Program Fit the Guidelines and Funding Interests?**

Junior Achievement of South Florida (JASF) believes that helping young people gain the skills needed to compete in the workforce is critical to their future success and the vitality of our economy. JA has long been a leader in providing hands-on, relevant, interactive, project based critical career skills training that helps prepare youth for the workforce. In fact, this has been one of our three core focuses for several decades. Sir Richard Branson has stated, "transformation of education is necessary to create more effective outcomes for students," and then cited JA as the model framework through which to achieve such a transformation. "Not only does JA inspire passionate young people," Sir Richard said, but "they fuel the entrepreneurial spirit and cultivate a culture of success."

JASF's leadership is committed to creating opportunities and pathways for youth employment. The leadership is dedicated to further developing innovative programs that produce highly effective outcomes for students. We recognize that programs like JA BizTown, JA Finance Park, and JA Inspire must not only provide skills training that will prepare students for employment and entrepreneurship, but must also promote and support employment and self-employment.

JA has a massive opportunity and ability to link with businesses, educational institutions, governmental entities, etc. due to the very nature of our core focus areas of workforce readiness, entrepreneurship and financial literacy. Our mission is well aligned with the focuses of many business leaders, governmental representatives and educational institutions. We are all focused on the issue of building a talent pipeline for the future.

JASF has very strong ties to business leaders and has several ways that we interact with them on a regular basis. We are fortunate to have a diverse board of directors of 66 business people who are committed to supporting the mission. These members represent companies of various sizes across many industries. These companies are involved with JASF in many ways and have come to trust JASF's expertise in the areas of workforce readiness, entrepreneurship and financial literacy.

In addition, JASF continues to host a CEO Advisory Council, which brings C-level executives together 3-4 times a year, to discuss issues like workforce development. Through these meetings we are able to better understand the needs of the employers and educate them on why strategies like soft skills training can help prepare the next generation of employees. We communicate with these leaders throughout the year and share successful examples of the experiences of youth and employers through our various programs. This forum also allows us to encourage these leaders to get their employees involved in our programs as volunteer mentors.

Junior Achievement of South Florida, celebrating over 100 years of service worldwide, and sixty years of service locally, is proud to serve the residents

of Pompano Beach through our work readiness, entrepreneurship, and financial literacy programs.

**Statement of Need:**

According to Broward by the Numbers (1/2017), youth unemployment remains consistently higher than other age groups. In Florida, the current unemployment rate is 11.3%. This is higher than the national rate of 10.3% according to the US Bureau of Labor Statistics. Currently, 18.5% of adults under 25 are unemployed. Current numbers are high due to the coronavirus pandemic, but this is also due to unskilled workers entering the labor force from high school. Employers cite a lack of critical life and soft skills as a key barrier to employment. And the demand for these types of skills is only increasing. According to Harvard University research, occupations that require strong social skills have grown faster than others since 1980 and show consistent wage growth since 2000. Since educational leaders have focused on increasing academic standards and measuring progress through a barrage of tests, soft skills have been pushed aside, leaving our youth at a distinct disadvantage.

JA BizTown addresses soft skills training at an early age, teaching customer service, communication, teamwork, adaptability, problem-solving, creativity, work ethic, interpersonal skills and even time management.

The JA Finance Park program addresses this issue by introducing hundreds of career opportunities during the virtual simulation portion, including salary ranges and educational requirements. Today's students have little opportunity in school to gain exposure to the plethora of careers that exist in our community across numerous industries. Whether a student is college-bound or bound for trade school, students need to have the opportunity to learn about careers that will excite them and motivate them to graduate and grow. The JA Finance Park program addresses this issue by introducing hundreds of career opportunities during the virtual experience, including salary ranges and educational requirements.

JA Inspire teaches necessary success skills and provides an opportunity to utilize them at the culminating JA Inspire Career Fair.

---

<b>Include a Description of the Geographic Area You Serve:</b>	Broward County, Boca Raton and Delray Beach
--	---

---

**About Your Board of Directors**

<b>Board Disabled</b>	0
-----------------------	---

<b>Board Minorities</b>	26
-------------------------	----

<b>Board Seniors</b>	23
----------------------	----

<b>Total Board Members</b>	66
----------------------------	----

---

## Program/Event Information #1

---

**Will your organization be hosting an event on City property?**

No

**Which are you applying for? (Program/Event)**

Program

**Program/Event Name**

JA BizTown / JA Finance Park

**Type of Program/Event**

Nonprofit Program/Seminar/Workshop

**Describe the program/event succinctly:**

JA BizTown is a fully interactive, true-to-life, simulated town experience, following up to 16 hours of in-class curriculum, where students work and live as citizens and employees of JA BizTown, while utilizing their newly learned soft skills necessary for successful participation in the world of work. Students run the various eighteen businesses, earn paychecks, open/manage bank accounts, take out and repay business loans, vote, price and advertise goods and services for sale, and more.

JA Finance Park starts with up to 16 hours of in-class curriculum and culminates in a one-day experience during which students explore careers and figure out how much to spend on housing, insurance, transportation, etc. to create/balance a 21-line item budget. This is all done based on an assigned life-scenario that includes family size, marital status, credit score, education and salary.

By taking on adult roles, kids become better prepared for their future as consumers, investors & workers.

---

**Elaborate on your program/event objectives. How do you plan on using the funding to solve the problem?**

JA BizTown "citizens" will learn how their interests and skills can lead to exciting careers. They will have an opportunity to assess their own skills and interests and to see what kinds of jobs are available at JA BizTown. They will even have an opportunity to fill out a job application and experience the job interview process. Students will:

- Recognize their interests and skills.
- Explain the relevance of interests and skills in career exploration and planning.
- Distinguish the differences among the four primary career types: people, ideas, data, and things.
- Categorize STEM careers into different types.
- Demonstrate appropriate workplace behaviors.
- Define resume, job interview, and applicant.
- Complete a job application.
- Model appropriate business greetings.
- Demonstrate proper interview skills.

JA Finance Park students will recognize the fundamental role that income plays in their personal finances and the factors that affect income and take-home pay. They will discover how their decisions about education and careers make an impact on their potential income and quality of life.

Students will:

- Rate their interests, abilities, and values.
- Determine work preferences and match them to career choices.
- Define taxes and explain their purpose and impact on income.
- Figure net monthly income.

Funding of \$15,000 from the City of Pompano Beach will cover a portion of:

- Program Salaries for employees who provide hands-on services with students: VP of Education, Capstone Director, Program Coordinator, Administrative Support Leader, Director of Volunteer Services, Volunteer Coordinator, Receptionist, Program Manager (3), and Program Assistants (4)
  - Curriculum costs
  - Volunteer recruitment, training, and recognition
-

**What are the outcomes of your program/event?**

The program is considered a success for the City of Pompano Beach when:

(JA BizTown)

- 97% of the fifth graders complete the JA BizTown curriculum and simulation.
- 97% of students research and get a job at JA BizTown.
- 80% of students show an increase between the pre- and post-tests.
- Business CEO's create reports that detail production and sales figures, and provide instant feedback as to whether a business is meeting goals.
- 80% of student checkbook registers are reconciled to their bank statements.

(JA Finance Park)

- 97% of the eighth graders complete the JA Finance Park curriculum and simulation.
- At least 90% of the students correctly complete their budget, meaning they pay their bills for all of the twenty-one items on the budget and have money left over to save, invest, and/or donate to charity.
- 80% of students show an increase between the pre- and post-tests.

---

**Estimated # of Attendees at the Program/Event (select the one that best applies)**

1,001-5,000

---

**Please Specify the Number of City of Pompano Beach Residents Your Organization will Serve if the Program/Event is Funded:**

1920

---

**Describe the demographics of the population you are impacting with this program/event: Demographics: Socioeconomic characteristics of a population expressed statistically, such as age, sex, education level, income level, occupation.**

Based on Broward County Public School's Demographics & Student Assignments Department, the 795 fifth graders, to be served from the nine public elementary schools in Pompano Beach, are mostly between 10-11 years old with an average of 89% eligible for free/reduced priced lunches and 54% African American, 1% Asian, 3% multi-ethnicity, 42% Caucasian and 33% Hispanic. These students will be provided the JA BizTown in-class curriculum and JA BizTown or JA BizTown Adventures virtual simulation.

Based on Broward County Public School's Demographics & Student Assignments Department, the 825 eighth graders, to be served from the two public middle schools in Pompano Beach, are mostly between 13-14 years old with an average of 86% eligible for free/reduced priced lunches and 51% African American, 2% Asian, 2% multi-ethnicity, 45% Caucasian and 32% Hispanic. These students will receive the JA Finance Park in-class curriculum and JA Finance Park or JA Finance Park Virtual 2.0 Simulation.

---

**Start Date of Program/Event:**

Oct 01, 2021

---



<b>End Date of Program/Event:</b>	Jun 30, 2022
<b>Does your program/event have a start time/end time?</b>	No
<b>Name of Program/Event Venue:</b>	Junior Achievement of South Florida
<b>Address of Program/Event Venue Location:</b>	1130 Coconut Creek Boulevard Coconut Creek, FL 33066
<b>Attire of Program/Event (select the one that best applies):</b>	Casual
<b>List any Benefits or Amenities the City of Pompano Beach Receives:</b>	<p>Recognition of the City of Pompano Beach via:</p> <ul style="list-style-type: none"> <li>• Logo and story in the Junior Achievement email blast to 27,000 community members.</li> <li>• Recognition on the JA BizTown and JA Finance Park virtual simulation days.</li> <li>• Annual Junior Achievement Impact Report.</li> <li>• <a href="http://www.jasouthflorida.org">www.jasouthflorida.org</a></li> <li>• <a href="https://www.facebook.com/JASFL">www.facebook.com/JASFL</a></li> <li>• <a href="https://www.twitter.com/JASouthFlorida">www.twitter.com/JASouthFlorida</a></li> <li>• <a href="https://www.instagram.com/jasouthflorida">www.instagram.com/jasouthflorida</a></li> </ul>
<b>Amount Requested:</b>	15000
<b>Are you applying for a second Program/Event?</b>	Yes
<b>Program/Event Information #2</b>	
<b>Will your organization be hosting an event on City property?</b>	No
<b>Which are you applying for? (Program/Event)</b>	Program
<b>Program/Event Name</b>	JA Inspire
<b>Type of Program/Event</b>	Nonprofit Program/Seminar/Workshop
<b>Describe the program/event succinctly:</b>	<p>JA Inspire is an interactive career exploration program that introduces students to high growth/high wage career fields following 3 hours of career readiness curriculum. Students engage with JA Inspire volunteers at the career fair to create connections that allow them to build an understanding of the cross-section of high demand jobs available to them in the future, from mid-skilled trades to highly technical STEM related careers.</p>

**Elaborate on your program/event objectives. How do you plan on using the funding to solve the problem?**

JA Inspire allows students to:

- Connect with professionals from some of the region's most prominent employers.
- Explore career pathways and learn about the skills needed for in-demand jobs.
- Empower students to connect their own interests with a variety of career opportunities.
- Strengthen their coursework pathway for high school and beyond.

Funding of \$7,500 from the City of Pompano Beach will cover a portion of:

- Program Salaries for employees who provide hands-on services with students: In-class Program Manager and Sr. Director, Workforce Development.
- Curriculum costs
- Volunteer recruitment, training, and recognition

**What are the outcomes of your program/event?**

(JA Inspire)

- 97% of the eighth graders complete the JA Inspire curriculum and JA Inspire Career Fair.
- 80% of students show an increase between the pre- and post-tests.
- 75% of students are introduced to businesses that they didn't know before.
- 70% of students will learn things that will help get them a job.

**Estimated # of Attendees at the Program/Event (select the one that best applies)**

501-1,000

**Please Specify the Number of City of Pompano Beach Residents Your Organization will Serve if the Program/Event is Funded:**

575

**Describe the demographics of the population you are impacting with this program/event: Demographics: Socioeconomic characteristics of a population expressed statistically, such as age, sex, education level, income level, occupation.**

Based on Broward County Public School's Demographics & Student Assignments Department, the 597 eighth graders, to be served from the two public middle schools in Pompano Beach, are mostly between 13-14 years old with an average of 51% eligible for free/reduced priced lunches and 53% African American, 1% Asian, 1% multi-ethnicity, 15% Hispanic and 21% Caucasian. These students will receive the JA Inspire in-class curriculum and JA Inspire Career Fair or JA Inspire Virtual.

**Start Date of Program/Event:**

Feb 01, 2022

**End Date of Program/Event:**

Feb 02, 2022

**Does your program/event have a start time/end time?**

Yes

**Start Time of Program/Event:**

09:00 AM

<b>End Time of Program/Event:</b>	02:00 PM
<b>Name of Program/Event Venue:</b>	Junior Achievement of South Florida
<b>Address of Program/Event Venue Location:</b>	1130 Coconut Creek Boulevard Coconut Creek, FL 33066
<b>Attire of Program/Event (select the one that best applies)</b>	Business Casual
<b>List any Benefits or Amenities the city of Pompano Beach Receives:</b>	Recognition of the City of Pompano Beach via: <ul style="list-style-type: none"><li>• Logo and story in the Junior Achievement email blast to 27,000 community members.</li><li>• Recognition on the JA BizTown and JA Finance Park virtual simulation days.</li><li>• Annual Junior Achievement Impact Report.</li><li>• <a href="http://www.jasouthflorida.org">www.jasouthflorida.org</a></li><li>• <a href="https://www.facebook.com/JASFL">www.facebook.com/JASFL</a></li><li>• <a href="https://www.twitter.com/JASouthFlorida">www.twitter.com/JASouthFlorida</a></li><li>• <a href="https://www.instagram.com/jasouthflorida">www.instagram.com/jasouthflorida</a></li></ul>
<b>Amount Requested:</b>	7500

### Additional Activities

<b>Are there any additional activities associated with the primary sponsorship event (Examples include VIP event, Kickoff event, Awards Ceremony, Thank You/Recognition Party, etc...)</b>	No
--	----

### Additional Information

**What are your organization's credentials? Tell us why your organization does it better than anyone else.**

Over the past 60 years (since inception in 1959, Junior Achievement of South Florida has served over 1,000,000 students in Broward County teaching financial literacy, workforce readiness and entrepreneurship. No other organization is offering programs like ours to local youth. The JA World Huizenga Center is the largest facility of its kind in the world. This pandemic has solidified the need for financial literacy education. Our programs offers students fundamental elements to a personal financial plan and expands knowledge on career paths.

Junior Achievement of South Florida was selected as the 2019 FAU Research Park Organization of the Year, and for the third year in a row was awarded one of JA USA's highest honors: the 4 Star Award to recognize staff and boards that meet national standards. In addition, JA was also the 2019 Greater Fort Lauderdale Alliance Economic Partner Finalist of the Year. Several other major successes have occurred over the last four years, like securing over \$850,000 in public funding from Broward County Public Schools, Broward County, and several municipalities.

Members of the Board of Directors are expected to attend all six board meetings and at least two JA events. Each member is expected to secure financial support of a minimum of \$5,000 and to make a meaningful personal gift. Each member must also serve on at least one Committee (Development, Finance, Governance, Programs, or Storefronts) and personally volunteer in at least one JA World program. New members attend a 45-minute orientation and are assigned a mentor.

The JA model gives school children exposure to adults who can bring their work experiences to the classroom and connect school lessons to the business world. Each year volunteers must be recruited and recognized in order to continue a history of very engaged, qualified volunteers. Our volunteers consistently rate their overall experience as 4.9 on a 5.0 scale, and they also provide anecdotal feedback that we use to improve our sign-up process and training.

Additionally:

- Junior Achievement of South Florida manages a \$5 million annual budget.
  - Over fifty grants, including 12 municipal grants, were received and managed last year alone.
  - Employee Policies and Procedures and Accounting Policies and Procedures are reviewed, and updated as needed, on an annual basis.
  - A background check is implemented prior to hiring all employees.
  - Appropriate performance incentives and disciplinary measures are in place.
  - A financial audit is completed every year.
  - An outside CPA closes our books every month to make sure we comply with federal and state rules and regulations, including those related to prohibited and unallowable activities.
-

**Any other information you wish to share?**

This initiative includes 3 high-impact educational programs for Pompano Beach's public school 5th and 8th grade students. JA BizTown, JA Finance Park and JA Inspire is available for elementary and middle school students. In addition, JASF continues to provide a myriad of programs to students at Ely High School and Pompano Beach High School. These programs include JA Career Bound, JA Fellows, JA Personal Finance, and JA Inspire.

We hope you will once again invest in the youth of Pompano Beach through Junior Achievement to help them own their own economic success and see a path to graduation and a career. The students we are training today are the future drivers of our local economy - our consumers, our employees, and our business owners. We proudly recognize the City of Pompano Beach in JA BizTown Town Hall, and we hope you'll continue and grow your support as we propose to increase our impact even more.

---

## City of Pompano Beach Funding History

**Has your organization been funded before by City of Pompano Beach?**

Yes

**If yes, when was the most recent year?**

2020/2021

**What was the name of program/event funded?**

JA BizTown / JA Finance Park / JA Personal Finance

**How much was the funding for this program/event?**

15000

---

## Requested Budget Information

**What is the total value your nonprofit is applying for?**

22500

**If you are not awarded the full funding requested for your event/program, will you be able to complete your project?**

No

**Are you including the following:**

Itemized Budget - Please provide a budget for the program/event you are applying for vs. the agency's annual budget = Yes  
W9 = Yes  
IRS Letter = Yes  
List of Board of Directors = Yes  
Articles of Incorporation = Yes  
Most Recent 990 Form = Yes

---

**Upload your documents: All items are mandatory.**

---

<b>Itemized Budget - Please provide a budget ONLY for the program/event you are applying for. Annual agency budgets will not be accepted.</b>	<a href="https://s3.amazonaws.com/files.formstack.com/uploads/3276970/72077528/793006444/72077528_junior_achievement_of_south_florida_itemized_budget.pdf">https://s3.amazonaws.com/files.formstack.com/uploads/3276970/72077528/793006444/72077528_junior_achievement_of_south_florida_itemized_budget.pdf</a>
---	---

<b>W9</b>	<a href="https://s3.amazonaws.com/files.formstack.com/uploads/3276970/72077535/793006444/72077535_junior_achievement_of_south_florida_w9.pdf">https://s3.amazonaws.com/files.formstack.com/uploads/3276970/72077535/793006444/72077535_junior_achievement_of_south_florida_w9.pdf</a>
-----------	---

<b>IRS Letter</b>	<a href="https://s3.amazonaws.com/files.formstack.com/uploads/3276970/72077552/793006444/72077552_junior_achievement_of_south_florida_irs_letter.pdf">https://s3.amazonaws.com/files.formstack.com/uploads/3276970/72077552/793006444/72077552_junior_achievement_of_south_florida_irs_letter.pdf</a>
-------------------	---

<b>List of Board of Directors</b>	<a href="https://s3.amazonaws.com/files.formstack.com/uploads/3276970/72077556/793006444/72077556_junior_achievement_of_south_florida_board_of_directors.pdf">https://s3.amazonaws.com/files.formstack.com/uploads/3276970/72077556/793006444/72077556_junior_achievement_of_south_florida_board_of_directors.pdf</a>
-----------------------------------	---

<b>Articles of Incorporation</b>	<a href="https://s3.amazonaws.com/files.formstack.com/uploads/3276970/72077558/793006444/72077558_junior_achievement_of_south_florida_articles_of_incorporation.pdf">https://s3.amazonaws.com/files.formstack.com/uploads/3276970/72077558/793006444/72077558_junior_achievement_of_south_florida_articles_of_incorporation.pdf</a>
----------------------------------	---

<b>Most Recent 990 Form</b>	<a href="https://s3.amazonaws.com/files.formstack.com/uploads/3276970/90960095/793006444/90960095_junior_achievement_of_south_florida_990_form.pdf">https://s3.amazonaws.com/files.formstack.com/uploads/3276970/90960095/793006444/90960095_junior_achievement_of_south_florida_990_form.pdf</a>
-----------------------------	---

## Upload your documents: Matching Gift Documentation

<b>Does Your Organization Receive Matching Funds?</b>	Yes
---	-----

<b>Please indicate one or more matching gift options below:</b>	One or more donors match general contributions to our organization.
---	---

<b>Matching Gift Documentation Supporting Your Organization</b>	<a href="https://s3.amazonaws.com/files.formstack.com/uploads/3276970/89621675/793006444/89621675_junior_achievement_of_south_florida_matching_gift_for_nonprofit.pdf">https://s3.amazonaws.com/files.formstack.com/uploads/3276970/89621675/793006444/89621675_junior_achievement_of_south_florida_matching_gift_for_nonprofit.pdf</a>
---	---

## Primary Nonprofit Contact

<b>Name</b>	Linda Lynch
-------------	-------------

<b>Title</b>	Grants and Government Relations Manager
--------------	---

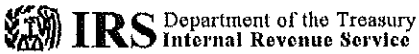
<b>Email</b>	<a href="mailto:linda@jasouthflorida.org">linda@jasouthflorida.org</a>
--------------	--

<b>Phone Number</b>	(954) 979-7100
---------------------	----------------

<b>Mailing Address (If awarded, your payment will be mailed to this address)</b>	1130 Coconut Creek Boulevard Coconut Creek, FL 33066
--	---

**Secondary Nonprofit Contact**

<b>Name</b>	Laurie Sallarulo
<b>Title</b>	President/CEO
<b>Email</b>	laurie@jasouthflorida.org
<b>Phone Number</b>	(954) 979-7100



Department of the Treasury  
Internal Revenue Service

Cincinnati Service Center  
CINCINNATI OH 45999-0038

In reply refer to: 0256521944  
June 12, 2019 LTR 4167C 0  
84-1267604 000000 00  
00014394  
BODC: TE

JUNIOR ACHIEVEMENT USA  
% EDWARD M PRIEM II  
1 EDUCATION WAY  
COLORADO SPGS CO 80906

032185

Employer identification number: 84-1267604  
Group exemption number: 1116

Dear Taxpayer:

This is in response to your request dated June 05, 2019, for information about your tax-exempt status.

Our records indicate we issued a determination letter to you in January 1994, and you're currently exempt under Internal Revenue Code (IRC) Section 501(c)(3).

We also recognized the subordinates on the list you submitted as exempt from federal income tax under IRC Section 501(c)(3).

For federal income tax purposes, donors can deduct contributions they make to you as provided in IRC Section 170. You're also qualified to receive tax deductible bequests, legacies, devises, transfers, or gifts under IRC Sections 2055, 2106 and 2522.

Because IRC Section 170(c) describes your subordinate organizations, donors can deduct contributions they make to them.

Please refer to [www.irs.gov/charities](http://www.irs.gov/charities) for information about filing requirements. Specifically, IRC Section 6033(j) provides that, if you don't file a required return or notice for three consecutive years, your exempt status will be automatically revoked on the filing due date of the third required return or notice.

In addition, each subordinate organization is subject to automatic revocation if it doesn't file a required return or notice for three consecutive years. Subordinate organizations can file required returns or notices individually or as part of a group return.

For tax forms, instructions, and publications, visit [www.irs.gov](http://www.irs.gov) or call 1-800-TAX-FORM (1-800-829-3676).

If you have questions, call 1-877-829-5500 between 8 a.m. and 5 p.m., local time, Monday through Friday (Alaska and Hawaii follow Pacific Time).



0256521944  
June 12, 2019 LTR 4167C 0  
84-1267604 000000 00  
00014395

JUNIOR ACHIEVEMENT USA  
% EDWARD M PRIEM II  
1 EDUCATION WAY  
COLORADO SPGS CO 80906

Sincerely yours,



Kim A. Billups, Operations Manager  
Accounts Management Operations 1



Department of the Treasury  
Internal Revenue Service

Cincinnati Service Center  
CINCINNATI OH 45999-0038

In reply refer to: 0255467241  
May 24, 2019 LTR 4168C 0  
84-1267604 000000 00

00015453  
BODC: TE

JUNIOR ACHIEVEMENT USA  
% EDWARD M PRIEM II  
1 EDUCATION WAY  
COLORADO SPGS CO 80906



023523

Employer ID number: 84-1267604  
Form 990 required: Y

Dear Taxpayer:

We're responding to your request dated May 17, 2019, about your tax-exempt status.

We issued you a determination letter in January 1994, recognizing you as tax-exempt under Internal Revenue Code (IRC) Section 501(c)(3).

We also show you're not a private foundation as defined under IRC Section 509(a) because you're described in IRC Sections 509(a)(1) and 170(b)(1)(A)(vi).

Donors can deduct contributions they make to you as provided in IRC Section 170. You're also qualified to receive tax deductible bequests, legacies, devises, transfers, or gifts under IRC Sections 2055, 2106, and 2522.

In the heading of this letter, we indicated whether you must file an annual information return. If you're required to file a return, you must file one of the following by the 15th day of the 5th month after the end of your annual accounting period:

- Form 990, Return of Organization Exempt From Income Tax
- Form 990EZ, Short Form Return of Organization Exempt From Income Tax
- Form 990-N, Electronic Notice (e-Postcard) for Tax-Exempt Organizations Not Required to File Form 990 or Form 990-EZ
- Form 990-PF, Return of Private Foundation or Section 4947(a)(1) Trust Treated as Private Foundation

According to IRC Section 6033(j), if you don't file a required annual information return or notice for 3 consecutive years, we'll revoke your tax-exempt status on the due date of the 3rd required return or notice.

You can get IRS forms or publications you need from our website at [www.irs.gov/forms-pubs](http://www.irs.gov/forms-pubs) or by calling 800-TAX-FORM (800-829-3676).

If you have questions, call 877-829-5500 between 8 a.m. and 5 p.m.,

0255467241  
May 24, 2019 LTR 4168C 0  
84-1267604 000000 00  
00015454

JUNIOR ACHIEVEMENT USA  
% EDWARD M PRIEM II  
1 EDUCATION WAY  
COLORADO SPGS CO 80906

local time, Monday through Friday (Alaska and Hawaii follow Pacific time).

Thank you for your cooperation.

Sincerely yours,

A handwritten signature in black ink, appearing to read 'K. A. Billups', written in a cursive style.

Kim A. Billups, Operations Manager  
Accounts Management Operations 1

# Request for Taxpayer Identification Number and Certification

Give Form to the  
requester. Do not  
send to the IRS.

► Go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9) for instructions and the latest information.

Print or type. See Specific Instructions on page 3.	1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. <b>Junior Achievement of South Florida, Inc.</b>	
	2 Business name/disregarded entity name, if different from above	
	3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only <b>one</b> of the following seven boxes.  <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ► _____ <b>Note:</b> Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is <b>not</b> disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner. <input checked="" type="checkbox"/> Other (see instructions) ► <b>Non-Profit</b>	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):  Exempt payee code (if any) _____  Exemption from FATCA reporting code (if any) _____  <i>(Applies to accounts maintained outside the U.S.)</i>
	5 Address (number, street, and apt. or suite no.) See instructions. <b>1130 Coconut Creek Boulevard</b>	Requester's name and address (optional)
	6 City, state, and ZIP code <b>Coconut Creek, Florida 33066</b>	
7 List account number(s) here (optional)		

## Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

**Note:** If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

<b>Social security number</b>									
			-				-		
<b>or</b>									
<b>Employer identification number</b>									
5	9		-	0	8	7	1	4	6

## Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

<b>Sign Here</b>	Signature of U.S. person ► 	Date ► <b>01/04/2021</b>
------------------	--	--------------------------

## General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

**Future developments.** For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9).

## Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

*If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.*

By signing the filled-out form, you:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
2. Certify that you are not subject to backup withholding, or
3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income, and
4. Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting, is correct. See *What is FATCA reporting*, later, for further information.

**Note:** If you are a U.S. person and a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

**Definition of a U.S. person.** For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien;
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States;
- An estate (other than a foreign estate); or
- A domestic trust (as defined in Regulations section 301.7701-7).

**Special rules for partnerships.** Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax under section 1446 on any foreign partners' share of effectively connected taxable income from such business. Further, in certain cases where a Form W-9 has not been received, the rules under section 1446 require a partnership to presume that a partner is a foreign person, and pay the section 1446 withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid section 1446 withholding on your share of partnership income.

In the cases below, the following person must give Form W-9 to the partnership for purposes of establishing its U.S. status and avoiding withholding on its allocable share of net income from the partnership conducting a trade or business in the United States.

- In the case of a disregarded entity with a U.S. owner, the U.S. owner of the disregarded entity and not the entity;
- In the case of a grantor trust with a U.S. grantor or other U.S. owner, generally, the U.S. grantor or other U.S. owner of the grantor trust and not the trust; and
- In the case of a U.S. trust (other than a grantor trust), the U.S. trust (other than a grantor trust) and not the beneficiaries of the trust.

**Foreign person.** If you are a foreign person or the U.S. branch of a foreign bank that has elected to be treated as a U.S. person, do not use Form W-9. Instead, use the appropriate Form W-8 or Form 8233 (see Pub. 515, *Withholding of Tax on Nonresident Aliens and Foreign Entities*).

**Nonresident alien who becomes a resident alien.** Generally, only a nonresident alien individual may use the terms of a tax treaty to reduce or eliminate U.S. tax on certain types of income. However, most tax treaties contain a provision known as a "saving clause." Exceptions specified in the saving clause may permit an exemption from tax to continue for certain types of income even after the payee has otherwise become a U.S. resident alien for tax purposes.

If you are a U.S. resident alien who is relying on an exception contained in the saving clause of a tax treaty to claim an exemption from U.S. tax on certain types of income, you must attach a statement to Form W-9 that specifies the following five items.

1. The treaty country. Generally, this must be the same treaty under which you claimed exemption from tax as a nonresident alien.
2. The treaty article addressing the income.
3. The article number (or location) in the tax treaty that contains the saving clause and its exceptions.
4. The type and amount of income that qualifies for the exemption from tax.
5. Sufficient facts to justify the exemption from tax under the terms of the treaty article.

**Example.** Article 20 of the U.S.-China income tax treaty allows an exemption from tax for scholarship income received by a Chinese student temporarily present in the United States. Under U.S. law, this student will become a resident alien for tax purposes if his or her stay in the United States exceeds 5 calendar years. However, paragraph 2 of the first Protocol to the U.S.-China treaty (dated April 30, 1984) allows the provisions of Article 20 to continue to apply even after the Chinese student becomes a resident alien of the United States. A Chinese student who qualifies for this exception (under paragraph 2 of the first protocol) and is relying on this exception to claim an exemption from tax on his or her scholarship or fellowship income would attach to Form W-9 a statement that includes the information described above to support that exemption.

If you are a nonresident alien or a foreign entity, give the requester the appropriate completed Form W-8 or Form 8233.

## Backup Withholding

**What is backup withholding?** Persons making certain payments to you must under certain conditions withhold and pay to the IRS 24% of such payments. This is called "backup withholding." Payments that may be subject to backup withholding include interest, tax-exempt interest, dividends, broker and barter exchange transactions, rents, royalties, nonemployee pay, payments made in settlement of payment card and third party network transactions, and certain payments from fishing boat operators. Real estate transactions are not subject to backup withholding.

You will not be subject to backup withholding on payments you receive if you give the requester your correct TIN, make the proper certifications, and report all your taxable interest and dividends on your tax return.

**Payments you receive will be subject to backup withholding if:**

1. You do not furnish your TIN to the requester,
2. You do not certify your TIN when required (see the instructions for Part II for details),
3. The IRS tells the requester that you furnished an incorrect TIN,
4. The IRS tells you that you are subject to backup withholding because you did not report all your interest and dividends on your tax return (for reportable interest and dividends only), or
5. You do not certify to the requester that you are not subject to backup withholding under 4 above (for reportable interest and dividend accounts opened after 1983 only).

Certain payees and payments are exempt from backup withholding. See *Exempt payee code*, later, and the separate Instructions for the Requester of Form W-9 for more information.

Also see *Special rules for partnerships*, earlier.

## What is FATCA Reporting?

The Foreign Account Tax Compliance Act (FATCA) requires a participating foreign financial institution to report all United States account holders that are specified United States persons. Certain payees are exempt from FATCA reporting. See *Exemption from FATCA reporting code*, later, and the Instructions for the Requester of Form W-9 for more information.

## Updating Your Information

You must provide updated information to any person to whom you claimed to be an exempt payee if you are no longer an exempt payee and anticipate receiving reportable payments in the future from this person. For example, you may need to provide updated information if you are a C corporation that elects to be an S corporation, or if you no longer are tax exempt. In addition, you must furnish a new Form W-9 if the name or TIN changes for the account; for example, if the grantor of a grantor trust dies.

## Penalties

**Failure to furnish TIN.** If you fail to furnish your correct TIN to a requester, you are subject to a penalty of \$50 for each such failure unless your failure is due to reasonable cause and not to willful neglect.

**Civil penalty for false information with respect to withholding.** If you make a false statement with no reasonable basis that results in no backup withholding, you are subject to a \$500 penalty.

**Criminal penalty for falsifying information.** Willfully falsifying certifications or affirmations may subject you to criminal penalties including fines and/or imprisonment.

**Misuse of TINs.** If the requester discloses or uses TINs in violation of federal law, the requester may be subject to civil and criminal penalties.

## Specific Instructions

### Line 1

You must enter one of the following on this line; **do not** leave this line blank. The name should match the name on your tax return.

If this Form W-9 is for a joint account (other than an account maintained by a foreign financial institution (FFI)), list first, and then circle, the name of the person or entity whose number you entered in Part I of Form W-9. If you are providing Form W-9 to an FFI to document a joint account, each holder of the account that is a U.S. person must provide a Form W-9.

a. **Individual.** Generally, enter the name shown on your tax return. If you have changed your last name without informing the Social Security Administration (SSA) of the name change, enter your first name, the last name as shown on your social security card, and your new last name.

**Note: ITIN applicant:** Enter your individual name as it was entered on your Form W-7 application, line 1a. This should also be the same as the name you entered on the Form 1040/1040A/1040EZ you filed with your application.

b. **Sole proprietor or single-member LLC.** Enter your individual name as shown on your 1040/1040A/1040EZ on line 1. You may enter your business, trade, or "doing business as" (DBA) name on line 2.

c. **Partnership, LLC that is not a single-member LLC, C corporation, or S corporation.** Enter the entity's name as shown on the entity's tax return on line 1 and any business, trade, or DBA name on line 2.

d. **Other entities.** Enter your name as shown on required U.S. federal tax documents on line 1. This name should match the name shown on the charter or other legal document creating the entity. You may enter any business, trade, or DBA name on line 2.

e. **Disregarded entity.** For U.S. federal tax purposes, an entity that is disregarded as an entity separate from its owner is treated as a "disregarded entity." See Regulations section 301.7701-2(c)(2)(iii). Enter the owner's name on line 1. The name of the entity entered on line 1 should never be a disregarded entity. The name on line 1 should be the name shown on the income tax return on which the income should be reported. For example, if a foreign LLC that is treated as a disregarded entity for U.S. federal tax purposes has a single owner that is a U.S. person, the U.S. owner's name is required to be provided on line 1. If the direct owner of the entity is also a disregarded entity, enter the first owner that is not disregarded for federal tax purposes. Enter the disregarded entity's name on line 2, "Business name/disregarded entity name." If the owner of the disregarded entity is a foreign person, the owner must complete an appropriate Form W-8 instead of a Form W-9. This is the case even if the foreign person has a U.S. TIN.

### Line 2

If you have a business name, trade name, DBA name, or disregarded entity name, you may enter it on line 2.

### Line 3

Check the appropriate box on line 3 for the U.S. federal tax classification of the person whose name is entered on line 1. Check only one box on line 3.

IF the entity/person on line 1 is a(n) . . .	THEN check the box for . . .
• Corporation	Corporation
• Individual • Sole proprietorship, or • Single-member limited liability company (LLC) owned by an individual and disregarded for U.S. federal tax purposes.	Individual/sole proprietor or single-member LLC
• LLC treated as a partnership for U.S. federal tax purposes, • LLC that has filed Form 8832 or 2553 to be taxed as a corporation, or • LLC that is disregarded as an entity separate from its owner but the owner is another LLC that is not disregarded for U.S. federal tax purposes.	Limited liability company and enter the appropriate tax classification. (P= Partnership; C= C corporation; or S= S corporation)
• Partnership	Partnership
• Trust/estate	Trust/estate

### Line 4, Exemptions

If you are exempt from backup withholding and/or FATCA reporting, enter in the appropriate space on line 4 any code(s) that may apply to you.

#### Exempt payee code.

- Generally, individuals (including sole proprietors) are not exempt from backup withholding.
- Except as provided below, corporations are exempt from backup withholding for certain payments, including interest and dividends.
- Corporations are not exempt from backup withholding for payments made in settlement of payment card or third party network transactions.
- Corporations are not exempt from backup withholding with respect to attorneys' fees or gross proceeds paid to attorneys, and corporations that provide medical or health care services are not exempt with respect to payments reportable on Form 1099-MISC.

The following codes identify payees that are exempt from backup withholding. Enter the appropriate code in the space in line 4.

- 1—An organization exempt from tax under section 501(a), any IRA, or a custodial account under section 403(b)(7) if the account satisfies the requirements of section 401(f)(2)
- 2—The United States or any of its agencies or instrumentalities
- 3—A state, the District of Columbia, a U.S. commonwealth or possession, or any of their political subdivisions or instrumentalities
- 4—A foreign government or any of its political subdivisions, agencies, or instrumentalities
- 5—A corporation
- 6—A dealer in securities or commodities required to register in the United States, the District of Columbia, or a U.S. commonwealth or possession
- 7—A futures commission merchant registered with the Commodity Futures Trading Commission
- 8—A real estate investment trust
- 9—An entity registered at all times during the tax year under the Investment Company Act of 1940
- 10—A common trust fund operated by a bank under section 584(a)
- 11—A financial institution
- 12—A middleman known in the investment community as a nominee or custodian
- 13—A trust exempt from tax under section 664 or described in section 4947

The following chart shows types of payments that may be exempt from backup withholding. The chart applies to the exempt payees listed above, 1 through 13.

IF the payment is for . . .	THEN the payment is exempt for . . .
Interest and dividend payments	All exempt payees except for 7
Broker transactions	Exempt payees 1 through 4 and 6 through 11 and all C corporations. S corporations must not enter an exempt payee code because they are exempt only for sales of noncovered securities acquired prior to 2012.
Barter exchange transactions and patronage dividends	Exempt payees 1 through 4
Payments over \$600 required to be reported and direct sales over \$5,000 <sup>1</sup>	Generally, exempt payees 1 through 5 <sup>2</sup>
Payments made in settlement of payment card or third party network transactions	Exempt payees 1 through 4

<sup>1</sup> See Form 1099-MISC, Miscellaneous Income, and its instructions.

<sup>2</sup> However, the following payments made to a corporation and reportable on Form 1099-MISC are not exempt from backup withholding: medical and health care payments, attorneys' fees, gross proceeds paid to an attorney reportable under section 6045(f), and payments for services paid by a federal executive agency.

**Exemption from FATCA reporting code.** The following codes identify payees that are exempt from reporting under FATCA. These codes apply to persons submitting this form for accounts maintained outside of the United States by certain foreign financial institutions. Therefore, if you are only submitting this form for an account you hold in the United States, you may leave this field blank. Consult with the person requesting this form if you are uncertain if the financial institution is subject to these requirements. A requester may indicate that a code is not required by providing you with a Form W-9 with "Not Applicable" (or any similar indication) written or printed on the line for a FATCA exemption code.

A—An organization exempt from tax under section 501(a) or any individual retirement plan as defined in section 7701(a)(37)

B—The United States or any of its agencies or instrumentalities

C—A state, the District of Columbia, a U.S. commonwealth or possession, or any of their political subdivisions or instrumentalities

D—A corporation the stock of which is regularly traded on one or more established securities markets, as described in Regulations section 1.1472-1(c)(1)(i)

E—A corporation that is a member of the same expanded affiliated group as a corporation described in Regulations section 1.1472-1(c)(1)(i)

F—A dealer in securities, commodities, or derivative financial instruments (including notional principal contracts, futures, forwards, and options) that is registered as such under the laws of the United States or any state

G—A real estate investment trust

H—A regulated investment company as defined in section 851 or an entity registered at all times during the tax year under the Investment Company Act of 1940

I—A common trust fund as defined in section 584(a)

J—A bank as defined in section 581

K—A broker

L—A trust exempt from tax under section 664 or described in section 4947(a)(1)

M—A tax exempt trust under a section 403(b) plan or section 457(g) plan

**Note:** You may wish to consult with the financial institution requesting this form to determine whether the FATCA code and/or exempt payee code should be completed.

## Line 5

Enter your address (number, street, and apartment or suite number). This is where the requester of this Form W-9 will mail your information returns. If this address differs from the one the requester already has on file, write NEW at the top. If a new address is provided, there is still a chance the old address will be used until the payor changes your address in their records.

## Line 6

Enter your city, state, and ZIP code.

## Part I. Taxpayer Identification Number (TIN)

**Enter your TIN in the appropriate box.** If you are a resident alien and you do not have and are not eligible to get an SSN, your TIN is your IRS individual taxpayer identification number (ITIN). Enter it in the social security number box. If you do not have an ITIN, see *How to get a TIN* below.

If you are a sole proprietor and you have an EIN, you may enter either your SSN or EIN.

If you are a single-member LLC that is disregarded as an entity separate from its owner, enter the owner's SSN (or EIN, if the owner has one). Do not enter the disregarded entity's EIN. If the LLC is classified as a corporation or partnership, enter the entity's EIN.

**Note:** See *What Name and Number To Give the Requester*, later, for further clarification of name and TIN combinations.

**How to get a TIN.** If you do not have a TIN, apply for one immediately. To apply for an SSN, get Form SS-5, Application for a Social Security Card, from your local SSA office or get this form online at [www.SSA.gov](http://www.SSA.gov). You may also get this form by calling 1-800-772-1213. Use Form W-7, Application for IRS Individual Taxpayer Identification Number, to apply for an ITIN, or Form SS-4, Application for Employer Identification Number, to apply for an EIN. You can apply for an EIN online by accessing the IRS website at [www.irs.gov/Businesses](http://www.irs.gov/Businesses) and clicking on Employer Identification Number (EIN) under Starting a Business. Go to [www.irs.gov/Forms](http://www.irs.gov/Forms) to view, download, or print Form W-7 and/or Form SS-4. Or, you can go to [www.irs.gov/OrderForms](http://www.irs.gov/OrderForms) to place an order and have Form W-7 and/or SS-4 mailed to you within 10 business days.

If you are asked to complete Form W-9 but do not have a TIN, apply for a TIN and write "Applied For" in the space for the TIN, sign and date the form, and give it to the requester. For interest and dividend payments, and certain payments made with respect to readily tradable instruments, generally you will have 60 days to get a TIN and give it to the requester before you are subject to backup withholding on payments. The 60-day rule does not apply to other types of payments. You will be subject to backup withholding on all such payments until you provide your TIN to the requester.

**Note:** Entering "Applied For" means that you have already applied for a TIN or that you intend to apply for one soon.

**Caution:** A disregarded U.S. entity that has a foreign owner must use the appropriate Form W-8.

## Part II. Certification

To establish to the withholding agent that you are a U.S. person, or resident alien, sign Form W-9. You may be requested to sign by the withholding agent even if item 1, 4, or 5 below indicates otherwise.

For a joint account, only the person whose TIN is shown in Part I should sign (when required). In the case of a disregarded entity, the person identified on line 1 must sign. Exempt payees, see *Exempt payee code*, earlier.

**Signature requirements.** Complete the certification as indicated in items 1 through 5 below.

**1. Interest, dividend, and barter exchange accounts opened before 1984 and broker accounts considered active during 1983.**

You must give your correct TIN, but you do not have to sign the certification.

**2. Interest, dividend, broker, and barter exchange accounts opened after 1983 and broker accounts considered inactive during 1983.** You must sign the certification or backup withholding will apply. If you are subject to backup withholding and you are merely providing your correct TIN to the requester, you must cross out item 2 in the certification before signing the form.

**3. Real estate transactions.** You must sign the certification. You may cross out item 2 of the certification.

**4. Other payments.** You must give your correct TIN, but you do not have to sign the certification unless you have been notified that you have previously given an incorrect TIN. "Other payments" include payments made in the course of the requester's trade or business for rents, royalties, goods (other than bills for merchandise), medical and health care services (including payments to corporations), payments to a nonemployee for services, payments made in settlement of payment card and third party network transactions, payments to certain fishing boat crew members and fishermen, and gross proceeds paid to attorneys (including payments to corporations).

**5. Mortgage interest paid by you, acquisition or abandonment of secured property, cancellation of debt, qualified tuition program payments (under section 529), ABLE accounts (under section 529A), IRA, Coverdell ESA, Archer MSA or HSA contributions or distributions, and pension distributions.** You must give your correct TIN, but you do not have to sign the certification.

**What Name and Number To Give the Requester**

For this type of account:	Give name and SSN of:
1. Individual	The individual
2. Two or more individuals (joint account) other than an account maintained by an FFI	The actual owner of the account or, if combined funds, the first individual on the account <sup>1</sup>
3. Two or more U.S. persons (joint account maintained by an FFI)	Each holder of the account
4. Custodial account of a minor (Uniform Gift to Minors Act)	The minor <sup>2</sup>
5. a. The usual revocable savings trust (grantor is also trustee) b. So-called trust account that is not a legal or valid trust under state law	The grantor-trustee <sup>1</sup> The actual owner <sup>1</sup>
6. Sole proprietorship or disregarded entity owned by an individual	The owner <sup>3</sup>
7. Grantor trust filing under Optional Form 1099 Filing Method 1 (see Regulations section 1.671-4(b)(2)(i)(A))	The grantor*
For this type of account:	Give name and EIN of:
8. Disregarded entity not owned by an individual	The owner
9. A valid trust, estate, or pension trust	Legal entity <sup>4</sup>
10. Corporation or LLC electing corporate status on Form 8832 or Form 2553	The corporation
11. Association, club, religious, charitable, educational, or other tax-exempt organization	The organization
12. Partnership or multi-member LLC	The partnership
13. A broker or registered nominee	The broker or nominee

For this type of account:	Give name and EIN of:
14. Account with the Department of Agriculture in the name of a public entity (such as a state or local government, school district, or prison) that receives agricultural program payments	The public entity
15. Grantor trust filing under the Form 1041 Filing Method or the Optional Form 1099 Filing Method 2 (see Regulations section 1.671-4(b)(2)(i)(B))	The trust

<sup>1</sup> List first and circle the name of the person whose number you furnish. If only one person on a joint account has an SSN, that person's number must be furnished.

<sup>2</sup> Circle the minor's name and furnish the minor's SSN.

<sup>3</sup> You must show your individual name and you may also enter your business or DBA name on the "Business name/disregarded entity" name line. You may use either your SSN or EIN (if you have one), but the IRS encourages you to use your SSN.

<sup>4</sup> List first and circle the name of the trust, estate, or pension trust. (Do not furnish the TIN of the personal representative or trustee unless the legal entity itself is not designated in the account title.) Also see *Special rules for partnerships*, earlier.

**\*Note:** The grantor also must provide a Form W-9 to trustee of trust.

**Note:** If no name is circled when more than one name is listed, the number will be considered to be that of the first name listed.

**Secure Your Tax Records From Identity Theft**

Identity theft occurs when someone uses your personal information such as your name, SSN, or other identifying information, without your permission, to commit fraud or other crimes. An identity thief may use your SSN to get a job or may file a tax return using your SSN to receive a refund.

To reduce your risk:

- Protect your SSN,
- Ensure your employer is protecting your SSN, and
- Be careful when choosing a tax preparer.

If your tax records are affected by identity theft and you receive a notice from the IRS, respond right away to the name and phone number printed on the IRS notice or letter.

If your tax records are not currently affected by identity theft but you think you are at risk due to a lost or stolen purse or wallet, questionable credit card activity or credit report, contact the IRS Identity Theft Hotline at 1-800-908-4490 or submit Form 14039.

For more information, see Pub. 5027, Identity Theft Information for Taxpayers.

Victims of identity theft who are experiencing economic harm or a systemic problem, or are seeking help in resolving tax problems that have not been resolved through normal channels, may be eligible for Taxpayer Advocate Service (TAS) assistance. You can reach TAS by calling the TAS toll-free case intake line at 1-877-777-4778 or TTY/TDD 1-800-829-4059.

**Protect yourself from suspicious emails or phishing schemes.**

Phishing is the creation and use of email and websites designed to mimic legitimate business emails and websites. The most common act is sending an email to a user falsely claiming to be an established legitimate enterprise in an attempt to scam the user into surrendering private information that will be used for identity theft.



The IRS does not initiate contacts with taxpayers via emails. Also, the IRS does not request personal detailed information through email or ask taxpayers for the PIN numbers, passwords, or similar secret access information for their credit card, bank, or other financial accounts.

If you receive an unsolicited email claiming to be from the IRS, forward this message to [phishing@irs.gov](mailto:phishing@irs.gov). You may also report misuse of the IRS name, logo, or other IRS property to the Treasury Inspector General for Tax Administration (TIGTA) at 1-800-366-4484. You can forward suspicious emails to the Federal Trade Commission at [spam@uce.gov](mailto:spam@uce.gov) or report them at [www.ftc.gov/complaint](http://www.ftc.gov/complaint). You can contact the FTC at [www.ftc.gov/idtheft](http://www.ftc.gov/idtheft) or 877-IDTHEFT (877-438-4338). If you have been the victim of identity theft, see [www.IdentityTheft.gov](http://www.IdentityTheft.gov) and Pub. 5027.

Visit [www.irs.gov/IdentityTheft](http://www.irs.gov/IdentityTheft) to learn more about identity theft and how to reduce your risk.

## Privacy Act Notice

Section 6109 of the Internal Revenue Code requires you to provide your correct TIN to persons (including federal agencies) who are required to file information returns with the IRS to report interest, dividends, or certain other income paid to you; mortgage interest you paid; the acquisition or abandonment of secured property; the cancellation of debt; or contributions you made to an IRA, Archer MSA, or HSA. The person collecting this form uses the information on the form to file information returns with the IRS, reporting the above information. Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation and to cities, states, the District of Columbia, and U.S. commonwealths and possessions for use in administering their laws. The information also may be disclosed to other countries under a treaty, to federal and state agencies to enforce civil and criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism. You must provide your TIN whether or not you are required to file a tax return. Under section 3406, payers must generally withhold a percentage of taxable interest, dividend, and certain other payments to a payee who does not give a TIN to the payer. Certain penalties may also apply for providing false or fraudulent information.

# *State of Florida*

## *Department of State*

I certify from the records of this office that JUNIOR ACHIEVEMENT OF SOUTH FLORIDA, INC. is a corporation organized under the laws of the State of Florida, filed on January 13, 1984.

The document number of this corporation is N00908.

I further certify that said corporation has paid all fees due this office through December 31, 2021, that its most recent annual report/uniform business report was filed on February 1, 2021, and that its status is active.

I further certify that said corporation has not filed Articles of Dissolution.

*Given under my hand and the  
Great Seal of the State of Florida  
at Tallahassee, the Capital, this  
the First day of February, 2021*



*Ronald R. De*  
**Secretary of State**

Tracking Number: 6047108541CC

To authenticate this certificate, visit the following site, enter this number, and then follow the instructions displayed.

<https://services.sunbiz.org/Filings/CertificateOfStatus/CertificateAuthentication>

# Junior Achievement of South Florida

## Board of Directors

Active Members Between 3/11/2021 and 3/11/2021

Board Member	Company	Job Title
<b>Mr. Alfredo Aguirre</b>	<b>Merrill Lynch Wealth Management</b>	<b>First Vice President</b>
Address: 600 N Pine Island Road, Ste. 300 Plantation, FL 33324		Phone: 954-916-2834 (Organization-Direct) (954) 261-5973 (Mobile) Email Address: alfredo_aguirre@ml.com
Committee(s): Board of Directors Marketing/PR/External Affairs Committee		
<b>Mr. Carlos Alvarez</b>	<b>BBVA Compass Bancshares, Inc.</b>	<b>Market President</b>
Address: 525 Okeechobee Blvd, # 1680 West Palm Beach, FL 33401		Phone: (561) 346-7391 (Mobile) Email Address: ca.alvarez@bbva.com
Committee(s): Board of Directors Innovative Initiatives Committee		
<b>Ms. Lisa B. Anderson</b>	<b>BankUnited</b>	<b>Senior Vice President</b>
Address: 900 SE 3rd Avenue, Ste. 200 Fort Lauderdale, FL 33316		Phone: 954-712-2910 (Organization-Main) (954) 599-1818 (Mobile) Email Address: landerson@bankunited.com
Committee(s): Board of Directors Governance Committee		
<b>Sunem Beaton Garcia</b>	<b>Broward College</b>	<b>Campus President / Vice Provost Academic Services</b>
Address: 1000 Coconut Creek Parkway Coconut Creek, FL 33066		Phone: (954) 201-2202 (Organization-Direct) (954) 445-8023 (Mobile) Email Address: sbeaton@broward.edu
Committee(s): Board of Directors Programs Committee		
<b>Mr. Robert Birdsong</b>	<b>OK Generators</b>	<b>President</b>
Address: 373 N River Avenue Deerfield Beach, FL 33441		Phone: 954-428-9990 (Organization-Main) 954-501-5547 (Mobile) Email Address: bobb@okgenerators.com
Committee(s): Board of Directors Executive Committee Governance Committee, Chairman		
<b>Ms. Karen Brooks</b>	<b>City of Coconut Creek</b>	<b>City Manager</b>
Address: 4800 West Copans Road Coconut Creek, FL 33063		Phone: (954) 973-6770 (Organization-Main) 954-401-8859 (Mobile) Email Address: KBrooks@coconutcreek.net
Committee(s): Board of Directors Community & Government Affairs Committee		
<b>Ms. Maureen Canada</b>	<b>Lighthouse Point Marina, Inc.</b>	<b>CEO</b>
Address: 2830 NE 29 Avenue Lighthouse Point, FL 33064		Phone: 954-941-0227 (Organization-Main) (954) 261-6251 (Mobile) Fax: (954) 941-3223 Email Address: mcanada@lhpmarina.com
Committee(s): Board of Directors Circle of Wise Women		
<b>Mr. Christopher G. Cavanagh</b>	<b>Petri Positive Pest Control</b>	<b>Vice-President and General Manager</b>
Address: 737 SW 9th Terrace Pompano Beach, FL 33069		Phone: 954-781-4100 (Organization-Main) 954-448-0969 (Mobile) Email Address: ccavanagh@petrispestcontrol.com
Committee(s): Board of Directors Marketing/PR/External Affairs Committee		
<b>Mr. Robert Ceravolo</b>	<b>Tropic Ocean Airways</b>	<b>CEO</b>

Board Member	Company	Job Title
<p>Address: 1100 Lee Wagener Blvd., 2072 Fort Lauderdale, FL 33315</p> <p>Committee(s): Board of Directors Innovative Initiatives Committee</p>		<p>Phone: (954) 210-5569 (Organization-Main) Email Address: rceravolo@flytropic.com</p>
<b>Mrs. Jeni Chokron</b>	<b>First Horizon Bank</b>	<b>SVP Broward Commercial Banking Team Lead Relationship Manager</b>
<p>Address: 1000 S Pine Isand Rd., Ste. 430 Plantation, FL 33324</p> <p>Committee(s): Board of Directors Community &amp; Government Affairs Committee Programs Committee</p>		<p>Phone: 954-275-6115 (Mobile) Email Address: jchokron@firsthorizon.com</p>
<b>Mr. Ben Cucuzza</b>	<b>Wells Fargo Bank</b>	<b>Affluent Segment Leader</b>
<p>Address: 350 E Las Olas Blvd Fort Lauderdale, FL 33301</p> <p>Committee(s): Board of Directors Finance Committee</p>		<p>Phone: (706) 290-3122 (Mobile) Email Address: ben.cucuzza@wellsfargo.com</p>
<b>Mr. Kenneth DeBritto</b>	<b>Ai Media Group</b>	<b>Partner</b>
<p>Address: 2951 East Stonebrook Circle Davie, FL 33330</p> <p>Committee(s): Board of Directors Marketing/PR/External Affairs Committee</p>		<p>Phone: (561) 758-0100 (Mobile) Email Address: kdebritto@aimg-partners.com</p>
<b>Mr. Richard Farah</b>	<b>Salesforce</b>	<b>Director, Software Engineering</b>
<p>Address: 7312 NW 45th Ave Coconut Creek, FL 33073</p> <p>Committee(s): Board of Directors Innovative Initiatives Committee</p>		<p>Phone: (954)249-6746 (Mobile) Email Address: rfarah@salesforce.com</p>
<b>Mr. Michael A. Fischler</b>	<b>Fischler &amp; Friedman, P.A.</b>	<b>Senior Partner</b>
<p>Address: 1000 S Andrews Avenue Fort Lauderdale, FL 33316</p> <p>Committee(s): Board of Directors Compensation Committee Governance Committee Legacy Council, Chairman</p>		<p>Phone: 954-763-5778 (Organization-Main) (954) 232-9582 (Mobile) Fax: (954) 763-3238 Email Address: michael@ffpa-law.com</p>
<b>Mrs. Katherine Foster</b>	<b>Bluegreen Corp.</b>	<b>SVP of Business Development &amp; Innovation</b>
<p>Address: 4960 Conference Way North, Suite 100 Boca Raton, FL 33431</p> <p>Committee(s): Board of Directors Executive Committee Programs Committee</p>		<p>Phone: 561-912-8000 (Organization-Main) (954) 646-1239 (Mobile) Email Address: kathy.foster@bluegreenvacations.com</p>
<b>Miss Monica Frank</b>	<b>Ernst &amp; Young LLP</b>	<b>Partner</b>
<p>Address: 400 Ne 3rd Avenue, #1703 Fort Lauderdale, FL 33301</p> <p>Committee(s): Board of Directors Programs Committee</p>		<p>Phone: (978) 902-5727 (Mobile) Email Address: monica.frank@ey.com</p>
<b>Mr. Alan Goldsmith</b>	<b>Broward Health</b>	<b>Executive VP &amp; Chief Admin Officer</b>
<p>Address: 303 SE 17 Street Fort Lauderdale, FL 33316</p> <p>Committee(s): Board of Directors Innovative Initiatives Committee</p>		<p>Phone: 954-355-4400 (Organization-Main) Email Address: agoldsmith@browardhealth.org</p>
<b>Major Kevin Granville</b>	<b>Broward County Sheriff's Office</b>	<b>Major</b>

Board Member	Company	Job Title
Address: 2601 West Broward Blvd Fort Lauderdale, FL 33312 Committee(s): Board of Directors Community & Government Affairs Committee		Phone: (954) 868-3822 (Mobile) Email Address: kevin_granville@sheriff.org
<b>Mr. David D. Greenberg</b>	<b>Greenberg Capital</b>	<b>President/CEO</b>
Address: 4183 Briarcliff Circle Boca Raton, FL 33496 Committee(s): Board of Directors Executive Committee Innovative Initiatives Committee, Chairman		Phone: (855) 521-9100 (Organization-Main) (561) 521-9100 (Mobile) Email Address: david@greenbergcapital.com
<b>Mr. David Gussack</b>	<b>Exotech, Inc.</b>	<b>President CEO</b>
Address: 1851 Blount Road Pompano Beach, FL 33069 Committee(s): Marketing/PR/External Affairs Committee		Phone: 954-917-1919 (Organization-Main) Email Address: David@exotech.com
<b>Dr. Stephen N. Henry</b>	<b>University of Miami Sports Medicine Institute</b>	<b>Physician</b>
Address: 5555 Ponce De Leon Blvd., 3rd Floor Coral Gables, FL 33146 Committee(s): Board of Directors		Phone: (305) 689-0100 (Organization-Direct) Email Address: snh55@med.miami.edu
<b>Mr. Brandon L. Hensler</b>	<b>NSU - Main Campus</b>	<b>Executive Director of Public Relations and Marketing Communications</b>
Address: 3301 College Avenue (Museum Tower) Davie, FL 33314 Committee(s): Board of Directors Executive Committee Marketing/PR/External Affairs Committee, Board Chairman		Phone: (954) 393-5926 (Mobile) Email Address: brandon.hensler@nova.edu
<b>Mr. Timothy Hogans, Jr.</b>	<b>NextEra Energy (FPL)</b>	<b>External Affairs Manager</b>
Address: 7201 Cypress Road Plantation, FL 33317 Committee(s): Board of Directors, Secretary Community & Government Affairs Committee, Chairman Executive Committee		Phone: 954-321-2189 (Organization-Main) 305-215-1800 (Mobile) Email Address: tim.hogans@fpl.com
<b>Ms. Brenda Horner</b>	<b>Consolidated Credit Solutions</b>	<b>Director of Operations</b>
Address: 5701 W Sunrise Blvd. Suite 200 Fort Lauderdale, FL 33313 Committee(s): Board of Directors Compensation Committee Executive Committee Governance Committee, Member		Phone: 954-377-9100 (Organization-Direct) Email Address: bhorner@consolidatedcredit.org
<b>Mr. Geoffrey Horst</b>	<b>Deloitte LLP</b>	<b>Tax Partner</b>
Address: 333 SE 2nd Avenue Suite 3600 Miami, FL 33131 Committee(s): Audit Committee Board of Directors, Treasurer Executive Committee Finance Committee		Phone: 305-372-3125 (Organization-Direct) Email Address: ghorst@deloitte.com
<b>Mr. Nicholas Kaniaris</b>	<b>PNC Financial Services Group, Inc., The</b>	<b>District Manager</b>
Address: 200 E Broward Blvd., 9th Floor Fort Lauderdale, FL 33301 Committee(s): Board of Directors Marketing/PR/External Affairs Committee		Phone: 954-745-4376 (Organization-Direct) (954) 804-9041 (Mobile) Email Address: nikokaniaris@yahoo.com

Board Member	Company	Job Title
<b>Mr. Andrew Koenig</b>	<b>City Furniture</b>	<b>President</b>
Address: 6701 N Hiatus Road Tamarac, FL 33321		Phone: 954-597-2200 (Organization-Main) (954) 829-4385 (Mobile) Email Address: andrewk@City-Furniture.com
Committee(s): Board of Directors, Vice Chairman Executive Committee		
<b>Mr. Ed Lawton</b>	<b>Enterprise Fleet Management</b>	<b>Fleet Strategy Manager</b>
Address: 5105 Johnson Road Coconut Creek, FL 33073		Phone: 954-354-5400 (Organization-Main) (954) 553-8549 (Mobile) Email Address: e87058@efleets.com
Committee(s): Board of Directors Programs Committee		
<b>Jessica Lerner</b>	<b>Community Care Plan</b>	<b>President and Chief Executive Officer</b>
Address: 1643 Harrison Parkway, Ste. 200 Sunrise, FL 33323		Phone: (954) 622-3222 (Organization-Direct) 954-309-2567 (Mobile) Email Address: jlerner@ccpcare.org
Committee(s): Board of Directors Programs Committee		
<b>Mr. Thomas H. Loffredo</b>	<b>Gray Robinson</b>	<b>Managing Shareholder</b>
Address: 401 E Las Olas Blvd. Suite 1000 Fort Lauderdale, FL 33301		Phone: 954-761-7499 (Organization-Direct) 954-895-3405 (Mobile) Fax: (954) 761-8112 Email Address: tom.loffredo@gray-robinson.com
Committee(s): Board of Directors Executive Committee Governance Committee		
<b>Dr. Nicole Mancini</b>	<b>The School Board Of Broward County</b>	
Address: 600 SE 3 Avenue, Floor 12 Fort Lauderdale, FL 33301-3125		Phone: (954) 415-4517 (Mobile) Email Address: nicole.mancini@browardschools.com
Committee(s): Board of Directors Programs Committee		
<b>Ms. Lois Marino</b>	<b>Hoffman's Chocolates</b>	<b>Director of Community Engagement</b>
Address: 401 E Las Olas Blvd., Ste 800 Fort Lauderdale, FL 33301		Phone: 954-940-6373 (Organization-Direct) (954) 558-5543 (Mobile) Email Address: lmarino@bbxcapital.com
Committee(s): Board of Directors Marketing/PR/External Affairs Committee, Co Chair Programs Committee		
<b>Ms. Michelle Martinez Reyes</b>	<b>Kelley Kronenberg Attorneys At Law</b>	<b>Chief Relations Officer</b>
Address: 10360 West State Road 84 Fort Lauderdale, FL 33324		Phone: (954) 370-9970 (Organization-Main) (305) 721-7055 (Mobile) Email Address: mmartinezreyes@kklaw.com
Committee(s): Board of Directors Marketing/PR/External Affairs Committee, Vice Chairman		
<b>Mr. Joel D. Mayersohn</b>	<b>Dickinson Wright</b>	<b>Member</b>
Address: 350 East Las Olas Blvd., Suite 1750 Fort Lauderdale, FL 33301		Phone: 954-991-5426 (Organization-Direct) (954) 557-5664 (Mobile) Fax: (844) 670-6009 Email Address: JMayersohn@dickinson-wright.com
Committee(s): Board of Directors Executive Committee Finance Committee		
<b>Mr. Michael McGinn</b>	<b>Prince Capital Partners</b>	<b>Managing Director</b>

Board Member	Company	Job Title
<p>Address: 20807 Biscayne Blvd. Suite 301 Adventura, FL 33180</p> <p>Committee(s): Board of Directors Compensation Committee Finance Committee</p>		<p>Phone: 305-682-5824 (Organization-Direct) (954) 415-5656 (Mobile) Email Address: mmcginn@princecp.com</p>
<b>Mr. Alan McKay</b>	<b>FLT Geosystems</b>	<b>Principal</b>
<p>Address: 809 Progresso Drive Fort Lauderdale, FL 33304</p> <p>Committee(s): Board of Directors Finance Committee</p>		<p>Phone: (954) 763-5300 (Organization-Main) (561) 504-1759 (Mobile) Email Address: amckay@fltgeosystems.com</p>
<b>Mr. Ronnie Medina</b>	<b>Amerant Bank</b>	<b>VP Commercial Banking</b>
<p>Address: 100 North Federal Highway, Suite 100 Fort Lauderdale, FL 33301</p> <p>Committee(s): Board of Directors Innovative Initiatives Committee</p>		<p>Phone: (954) 678-0300 (Organization-Main) (954) 600-9995 (Mobile) Email Address: RMedina@amerantbank.com</p>
<b>Mr. Iwan Mohamed</b>	<b>Bb&amp;T Corporation /Truist</b>	<b>Broward County Market President</b>
<p>Address: 110 E Broward Blvd, 21st Flr Fort Lauderdale, FL 33301</p> <p>Committee(s): Board of Directors Innovative Initiatives Committee</p>		<p>Phone: 954-233-0455 (Organization-Main) (954) 459-1284 (Mobile) Email Address: imohamed@bbandt.com</p>
<b>Mr. Stuart R. Morris</b>	<b>Law Offices Of Stuart R. Morris, P.A.</b>	<b>Wealth Preservation Attorney</b>
<p>Address: 7284 W Palmetto Park Road, Suite 101 Boca Raton, FL 33433</p> <p>Committee(s): Board of Directors Executive Committee</p>		<p>Phone: 561-750-3850 (Organization-Main) 954-695-7118 (Mobile) Email Address: smorris@law-morris.com</p>
<b>Mr. Zachary Morrison</b>	<b>Tinuiti</b>	<b>CEO</b>
<p>Address: 150 NW 108th Terrace Plantation, FL 33324</p> <p>Committee(s): Board of Directors Innovative Initiatives Committee</p>		<p>Phone: (954) 606-6672 (Organization-Direct) (954) 913-4321 (Mobile) Email Address: zach.morrison@tinuiti.com</p>
<b>Mrs. Monica Navarro</b>	<b>Molina Healthcare Of Florida</b>	
<p>Address: 1066 Twin Branch Lane Weston, FL 33326</p> <p>Committee(s): Board of Directors Finance Committee</p>		<p>Phone: (954) 907-6593 (Mobile) Email Address: Monica.Navarro@MolinaHealthCare.Com</p>
<b>Mr. Steve Nudelberg</b>	<b>On the Ball Ventures</b>	<b>Principal</b>
<p>Address: 701 S. Oliv Avenue, 1102 West Palm Beach, FL 33401</p> <p>Committee(s): Board of Directors Innovative Initiatives Committee</p>		<p>Phone: 954-332-2200 (Organization-Main) (305) 776-1100 (Mobile) Email Address: steve@ontheballmarketing.com</p>
<b>Mr. John T. Ray, III</b>	<b>Sonitrol of Fort Lauderdale</b>	<b>President &amp; CEO</b>
<p>Address: 1770 NW 64 Street Suite 630 Fort Lauderdale, FL 33309</p> <p>Committee(s): Board of Directors Executive Committee Finance Committee</p>		<p>Phone: 954-772-9700 (Organization-Main) (954) 275-6120 (Mobile) Email Address: jray@securefl.com</p>

Board Member	Company	Job Title
<b>Mr. Richard Rodriguez</b>	<b>Centuric, LLC</b>	<b>President &amp; CEO</b>
Address: 4111 Sw 47th Ave #319, Davie, FL 33314 Fort Lauderdale, FL 33301 Committee(s): Board of Directors		Phone: (954) 691-1651 (Organization-Main) Email Address: rrodriguez@centuric.com
<b>Mr. Jerome Rosenthal</b>	<b>Tire Hut, Inc.</b>	<b>CEO</b>
Address: 1250 W Sunrise Blvd. Fort Lauderdale, FL 33311 Committee(s): Board of Directors		Phone: 954-462-7780 (Organization-Main) Email Address: jrwino@bellsouth.net
<b>Mr. Timothy A. Rubin</b>	<b>Kaufman Rossin &amp; Co - Fort Lauderdale</b>	<b>Director of Client Services</b>
Address: 100 SE 3rd Avenue, Ste 2400 Fort Lauderdale, FL 33394 Committee(s): Board of Directors, Chairman Executive Committee, Chairman Governance Committee		Phone: 954-713-7435 (Organization-Direct) (954) 609-8127 (Mobile) Email Address: trubin@kaufmanrossin.com
<b>Ms. Meaghan Ryan</b>	<b>Seminole Gaming</b>	<b>Vice President of Global Talent and Team Member Relations</b>
Address: 6401 Sheridan St Hollywood, FL 33024 Committee(s): Board of Directors Executive Committee Programs Committee, Chairman		Phone: (702) 428-9326 (Mobile) Email Address: meaghaneryan48@yahoo.com
<b>Ms. Daphnee A. Sainvil</b>	<b>City of Fort Lauderdale</b>	<b>Government &amp; External Affairs Manager</b>
Address: 100, North Andrews Avenue Fort Lauderdale, FL 33301 Committee(s): Board of Directors Community & Government Affairs Committee Marketing/PR/External Affairs Committee		Phone: 305-343-2104 (Mobile) Email Address: dsainvil02@gmail.com
<b>Ms. Angelika Schlanger</b>	<b>The Frederick A. DeLuca Foundation</b>	<b>Director</b>
Address: 500 E. Broward Blvd., Ste. 2300 Fort Lauderdale, FL 33394 Committee(s): Board of Directors Programs Committee		Phone: 954-495-2312 (Organization-Main) Email Address: aschlanger@freddelucafoundation.com
<b>Ms. Franki Schmidt</b>	<b>American Express Company</b>	<b>Vice President Business Development</b>
Address: 714 NW 123rd Drive Coral Springs, FL 33071 Committee(s): Board of Directors Executive Committee		Phone: 888-297-6282 (Organization-Main) 954-675-8358 (Mobile) Email Address: franki.lupo.schmidt@aexp.com
<b>Mr. Joseph P. Schumacker</b>	<b>SpareZ - Davie</b>	<b>CEO</b>
Address: 5325 S University Drive Davie, FL 33328 Committee(s): Board of Directors Innovative Initiatives Committee Programs Committee		Phone: 954-846-8400 (Organization-Main) Email Address: schumacker@earthlink.net
<b>Mr. Don Silvestri</b>	<b>Debt.com</b>	<b>President</b>
Address: 5769 West Sunrise Blvd. Plantation, FL 33313 Committee(s): Board of Directors		Phone: (954) 377-9156 (Organization-Main) (954) 577-6964 (Mobile) Email Address: don@debt.com
<b>Ms. Dawn Stagliano</b>	<b>Comcast Corporation</b>	<b>Director, Government Affairs</b>
Address: 4296 Palo Verde Dr Boynton Beach, FL 33436		Phone: 561-882-4379 (Organization-Main) 954-650-0053 (Mobile) Email Address: dawn_stagliano@comcast.com



Board Member	Company	Job Title
Committee(s): Board of Directors Circle of Wise Women Marketing/PR/External Affairs Committee		
<b>Mr. Alfredo Suarez</b>	<b>Royal Caribbean Cruises Ltd.</b>	<b>Vice President, Strategy &amp; Corporate Development</b>
Address: 1050 Caribbean Way Miami, FL 33132 Committee(s): Board of Directors		Phone: 305-539-6000 (Organization-Main) Email Address: asuarez@rccl.com
<b>Mrs. Kim Sweers</b>	<b>FastBoat Marine Group</b>	<b>Founder/Managing Partner</b>
Address: 1490 N Federal Hwy Pompano Beach, FL 33062 Committee(s): Innovative Initiatives Committee		Phone: (954) 581-8355 (Organization-Direct) Email Address: kim@fbmarine.com
<b>Mr. Robert C. Swindell</b>	<b>Greater Fort Lauderdale Alliance</b>	<b>Sr. Vice President</b>
Address: 110 E Broward Blvd Suite 1990 Fort Lauderdale, FL 33301 Committee(s): Board of Directors		Phone: 954-524-3113 (Organization-Main) (954) 627-0129 (Mobile) Email Address: BSwindell@GFLAlliance.org
<b>Ms. Nicky Tesser</b>	<b>JetBlue Airways</b>	<b>Manager Community &amp; Crewmember Engagement</b>
Address: 27-01 Queens Plaza N Long Island City, NY 11101 Committee(s): Board of Directors Programs Committee		Phone: 917-391-6993 (Organization-Main) Email Address: nicky.tesser@jetblue.com
<b>Mr. Gregory C. Thompson</b>	<b>Kemet Corporation</b>	<b>Executive Vice President and CFO</b>
Address: One East Broward Blvd. Fort Lauderdale, FL 33301 Committee(s): Board of Directors Compensation Committee Finance Committee		Phone: 954-766-2826 (Organization-Main) (440) 315-5351 (Mobile) Email Address: gregthompson@kemet.com
<b>Mr. Matthew Verga</b>	<b>KPMG LLP</b>	<b>Senior Audit Manager</b>
Address: 450 E Las Olas Blvd, Suite 1200 Fort Lauderdale, FL 33301 Committee(s): Board of Directors Finance Committee		Phone: 954-524-6000 (Organization-Main) Email Address: mverga@KPMG.com
<b>Mr. Mark S. Walter, CPA</b>	<b>The Legacy Companies</b>	<b>Chief Financial Officer</b>
Address: 3355 Enterprise Avenue, Ste. 160 Weston, FL 33331 Committee(s): Audit Committee, Board Chairman Board of Directors Executive Committee		Phone: (954) 660-1462 (Organization-Direct) (954) 817-2154 (Mobile) Email Address: mwalter@thelegacycompanies.com
<b>Mr. Chaz Warrington</b>	<b>DEX Imaging, Inc.</b>	<b>General Manager</b>
Address: 2500 N Andrews Avenue Ext Pompano Beach, FL 33064 Committee(s): Board of Directors Innovative Initiatives Committee Marketing/PR/External Affairs Committee		Phone: (813) 769-4282 (Organization-Main) Email Address: cwarrington@deximaging.com
<b>Mr. Mitch Welin</b>	<b>ComRes, Inc.</b>	<b>President</b>
Address: 424 SW 12th Avenue Deerfield Beach, FL 33442-3108 Committee(s): Board of Directors Event-Bowl-A-Thon Programs Committee		Phone: 954-462-9600 (Organization-Main) Email Address: mwelin@comresusa.com

Board Member	Company	Job Title
<b>Mr. Michael Weymouth</b>	<b>Riverside Hotel</b>	<b>President</b>
Address: 620 E Las Olas Blvd Fort Lauderdale, FL 33301		Phone: 954-463-5630 ext. 14 (Organization-Direct) 954-712-9915 (Mobile) Email Address: mike@lasolas.co
Committee(s): Board of Directors Event-Hall of Fame		
<b>Mr. Peter R. Woolf</b>	<b>Community Volunteer</b>	
Address: 1208 NE 1st Street Fort Lauderdale, FL 33301		Phone: (954) 494-1892 (Mobile) Email Address: woolfp@gmail.com
Committee(s): Audit Committee Board of Directors Finance Committee		
<b>Mr. Jordan Yates</b>	<b>Yates Institute of Plastic Surgery</b>	<b>Vice President</b>
Address: 717 SE 2nd Street Fort Lauderdale, FL 33301		Phone: (954) 463-5208 (Organization-Main) (563) 639-2563 (Mobile) Email Address: jordan@yatesinstitute.com
Committee(s): Board of Directors Innovative Initiatives Committee		
<b>Mr. Eric Yutzy</b>	<b>WPLG-TV</b>	<b>News Anchor</b>
Address: 3401 W Hallandale Beach Blvd. Pembroke Park, FL 33023		Phone: 954-364-2500 (Organization-Main) (305) 240-4286 (Mobile) Email Address: eyutzy@wplg.com
Committee(s): Board of Directors		

EXTENDED TO MAY 17, 2021

Form **990**  
(Rev. January 2020)  
Department of the Treasury  
Internal Revenue Service

# Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

OMB No. 1545-0047

**2019**

Open to Public Inspection

Do not enter social security numbers on this form as it may be made public.

Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

A For the 2019 calendar year, or tax year beginning JUL 1, 2019 and ending JUN 30, 2020

<b>B</b> Check if applicable: <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Final return/terminated <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	<b>C</b> Name of organization <b>JUNIOR ACHIEVEMENT OF SOUTH FLORIDA, INC.</b>		<b>D</b> Employer identification number <b>59-0871446</b>
	Doing business as		<b>E</b> Telephone number <b>954-979-7100</b>
	Number and street (or P.O. box if mail is not delivered to street address)	Room/suite	
	<b>1130 COCONUT CREEK BLVD.</b>		
	City or town, state or province, country, and ZIP or foreign postal code <b>COCONUT CREEK, FL 33066</b>		<b>G</b> Gross receipts \$ <b>4,593,483.</b>
<b>F</b> Name and address of principal officer: <b>LAURIE SALLARULO</b> <b>SAME AS C ABOVE</b>			<b>H(a)</b> Is this a group return for subordinates? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <b>H(b)</b> Are all subordinates included? <input type="checkbox"/> Yes <input type="checkbox"/> No If "No," attach a list. (see instructions) <b>H(c)</b> Group exemption number
<b>I</b> Tax-exempt status: <input checked="" type="checkbox"/> 501(c)(3) <input type="checkbox"/> 501(c) ( ) (insert no.) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527 <b>J</b> Website: <b>WWW.JASOUTHFLORIDA.ORG</b>			
<b>K</b> Form of organization: <input type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input checked="" type="checkbox"/> Other			<b>L</b> Year of formation: <b>1984</b> <b>M</b> State of legal domicile: <b>FL</b>

**Part I Summary**

<b>Activities &amp; Governance</b>	<b>1</b> Briefly describe the organization's mission or most significant activities: <b>TO INSPIRE AND PREPARE YOUNG PEOPLE TO SUCCEED IN A GLOBAL ECONOMY.</b>		
	<b>2</b> Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.		
	<b>3</b> Number of voting members of the governing body (Part VI, line 1a)	<b>3</b>	<b>63</b>
	<b>4</b> Number of independent voting members of the governing body (Part VI, line 1b)	<b>4</b>	<b>63</b>
	<b>5</b> Total number of individuals employed in calendar year 2019 (Part V, line 2a)	<b>5</b>	<b>81</b>
	<b>6</b> Total number of volunteers (estimate if necessary)	<b>6</b>	<b>5118</b>
	<b>7a</b> Total unrelated business revenue from Part VIII, column (C), line 12	<b>7a</b>	<b>0.</b>
<b>b</b> Net unrelated business taxable income from Form 990-T, line 39	<b>7b</b>	<b>0.</b>	
<b>Revenue</b>	<b>8</b> Contributions and grants (Part VIII, line 1h)	<b>Prior Year</b> <b>4,392,643.</b>	<b>Current Year</b> <b>4,050,625.</b>
	<b>9</b> Program service revenue (Part VIII, line 2g)	<b>0.</b>	<b>0.</b>
	<b>10</b> Investment income (Part VIII, column (A), lines 3, 4, and 7d)	<b>29,506.</b>	<b>20,857.</b>
	<b>11</b> Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	<b>811,885.</b>	<b>380,863.</b>
	<b>12</b> Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	<b>5,234,034.</b>	<b>4,452,345.</b>
<b>Expenses</b>	<b>13</b> Grants and similar amounts paid (Part IX, column (A), lines 1-3)	<b>0.</b>	<b>0.</b>
	<b>14</b> Benefits paid to or for members (Part IX, column (A), line 4)	<b>0.</b>	<b>0.</b>
	<b>15</b> Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	<b>2,251,743.</b>	<b>2,447,398.</b>
	<b>16a</b> Professional fundraising fees (Part IX, column (A), line 11e)	<b>0.</b>	<b>0.</b>
	<b>b</b> Total fundraising expenses (Part IX, column (D), line 25)	<b>683,233.</b>	
	<b>17</b> Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	<b>2,431,232.</b>	<b>2,039,227.</b>
	<b>18</b> Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	<b>4,682,975.</b>	<b>4,486,625.</b>
<b>19</b> Revenue less expenses. Subtract line 18 from line 12	<b>551,059.</b>	<b>-34,280.</b>	
<b>Net Assets or Fund Balances</b>	<b>20</b> Total assets (Part X, line 16)	<b>Beginning of Current Year</b> <b>18,086,403.</b>	<b>End of Year</b> <b>18,347,008.</b>
	<b>21</b> Total liabilities (Part X, line 26)	<b>5,089,994.</b>	<b>5,488,897.</b>
	<b>22</b> Net assets or fund balances. Subtract line 21 from line 20	<b>12,996,409.</b>	<b>12,858,111.</b>

**Part II Signature Block**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

<b>Sign Here</b>	Signature of officer		Date		
	<b>LAURIE SALLARULO, PRESIDENT &amp; EXECUTIVE DIRECTOR</b>				
<b>Paid Preparer Use Only</b>	Print/Type preparer's name	Preparer's signature	Date	Check <input type="checkbox"/> if self-employed	PTIN
	<b>WILLIAM G. BENSON</b>	<b>WILLIAM G. BENSON</b>	<b>01/15/21</b>		<b>P00455500</b>
	Firm's name	Firm's EIN			
	<b>KEEFE, MCCULLOUGH &amp; CO., LLP, C.P.A.'S</b>	<b>59-1363792</b>			
	Firm's address	Phone no.			
	<b>6550 N FEDERAL HIGHWAY, SUITE 410 FT. LAUDERDALE, FL 33308</b>	<b>954-771-0896</b>			

May the IRS discuss this return with the preparer shown above? (see instructions) ☒ Yes ☐ No

## GIFT AGREEMENT

Between

**Junior Achievement of South Florida &  
Patten Family Foundation c/o Harry Patten**

This Gift Agreement (“Agreement”) is made this 1<sup>st</sup> day of February 2021 between Patten Family Foundation c/o Harry Patten (hereinafter referred to as “the Donor”), and Junior Achievement of South Florida a not-for-profit corporation located in Coconut Creek, Florida.

The Donor and the Junior Achievement of South Florida agree as follows:

1. Donor Commitment. The Donor hereby pledges to Junior Achievement of South Florida the sum of \$100,000, which as provided for herein is designated for the benefit of Junior Achievement of South Florida.
2. Donor Purpose. a. Purpose. It is understood and agreed that the gift will be used as a matching gift for general purposes.
3. Payment. It is further understood and agreed that the gift will be paid in full on or before 3/31/2021.
4. Recognition by Junior Achievement of South Florida. To honor the Donor, and to express the appreciation of Junior Achievement of South Florida, publicity in the form of news announcements, both internal and external, will be made with the permission of the Donor.
5. Reporting and Stewardship. Reports on performance of the Fund and use of the proceeds shall be provided annually to the Donor for matching gifts.
6. Additional Gifts. The Donor reserves the right to increase the Fund through additional gifts and hereby consents to additional contributions to the Fund by any individual, corporation, foundation, trust, estate or other legal entity through individual gift, bequest or other gift vehicle, and all gifts so designated shall be subject to the provisions of this Agreement.

In witness whereof, the parties to this Agreement have affixed their signatures:

*Harry Patten*

2/1/2021

Harry Patten, Donor  
Patten Family Foundation

Date

*Laurie Sallarulo*

2/1/2021

Laurie Sallarulo, President/CEO  
Junior Achievement of South Florida

Date

# JUNIOR ACHIEVEMENT OF SOUTH FLORIDA

REVENUES		
Description	JA BizTown / JA Finance Park / JA Inspire	Use of Funds
Contribution - Volunteers	477	
Contribution - Corporate	35,542	
Contribution - Foundations	1,381	
Contribution - Public Funding (Pompano Beach)	44,314	22,500
Programs - Capstone Fees	7,406	
JA Hoffman Ice Cream	497	
Storefront Revenue	10,246	
Revenue Subtotal	99,863	22,500
In Kind - Storefront	12,427	
In Kind - Volunteer Services	49,709	
GIK Subtotal	62,136	
Total Revenues	161,999	22,500
EXPENSES		
Salaries*	42,096	16,000
FICA / Medicare 7.65% total salaries	3,220	
FL Unemployment 2.7% of first 7000 per employee	292	
Payroll Processing Fee 2% of salaries	4,363	
Medical \$7,305 per f/t employee	5,245	
Workers Comp 4.13% of salaries	1,739	
Salary, fringe subtotal	56,955	16,000
Curr Materials - \$3 per student	6,651	6,100
JA USA Program & Support Fee - \$3 per student	6,651	
Volunteer Services/Recruitment/Recognition	447	400
Teacher Recognition	83	
Teacher Services	55	
Graphic Design	110	
Marketing	442	
Printing	2,176	
Local Travel	55	
Food & Beverage - student snacks	856	
Supplies	442	
Postage	11	
Insurance \$.30 x students	665	
PC Software	221	
Staff Recognition/Meetings	50	
JA Hoffman's Ice Cream	498	
Utilities	6,606	
Repairs & Maintenance	5,558	
Facility Use & Cleaning	11,331	
Program Expenses Subtotal	42,908	6,500
In Kind - Storefront	12,427	
In Kind - Volunteer Services	49,709	
GIK Expense Subtotal	62,136	
Total Expenses	161,999	22,500

Schools	# Served
<b>JA BizTown</b>	
Charles Drew Elementary	78
Cresthave Elementary	85
Cypress Elementary	112
Markham Elementary	81
McNab Elementary	98
Norcrest Elementary	121
Palmview Elementary	98
Pompano Beach Elementary	51
Sanders Elementary	71
<b>JA Finance Park</b>	
Pompano Beach Middle	352
Cyrstal Lake Middle	473
<b>JA Inspire</b>	
Pompano Beach Middle	295
Cyrstal Lake Middle	302
<b>TOTAL SERVED</b>	<b>2,217</b>

# Served based on 2020/2021 enrollment

Total Students	2,217
Cost per Student	73

## **Exhibit “B” Payment Schedule**

### **A. AWARD DISBURSEMENTS**

The awards disbursement process will begin in October, 1 and end in September, 30 for the fiscal year that this contract is approved.

### **B. PAYMENT SCHEDULE**

The total amount awarded for the JUNIOR ACHIEVEMENT OF SOUTH FLORIDA, INC. for JA Inspire for the current fiscal year is: \$7,500.

There will be four (4) payout/s during the period (depending on the amount awarded to each organization):

1. The first will equal 25% of the total allocation or \$1,875; be issued in advance. For any funds advanced the RECIPIENT agrees to provide the CITY with an itemization of how funds advanced were spent, along with invoices and proof of payment. Such an accounting must be provided to the CITY in the quarterly financial report as indicated in Exhibit “A” Recipients Requirements, Contractual Responsibilities and Program Description. Failure to comply with this requirement may result in the denial of the future requests for payments.
2. The second will equal 25% of the total allocation or \$1,875; will be issued upon receipt AND approval of the second quarterly narrative and financial report (including any additional requested documents);
3. The third payout will equal 25% of the total allocation or \$1,875; will be issued upon receipt AND approval of the third quarterly narrative and financial report (including any additional requested documents);
4. The fourth payout will be the final 25% of the total allocation or \$1,875 and will be issued in upon receipt AND approval of the final quarterly narrative and financial report (including any additional requested documents).

## **EXHIBIT C**

### **INSURANCE REQUIREMENTS: NON PROFIT ORGANIZATION**

ORGANIZATION shall not commence services under the terms of this Agreement until certification or proof of insurance detailing terms and provisions has been received and approved in writing by the CITY's Risk Manager. If you have questions regarding the insurance requirements hereunder, please contact the City's Purchasing Department at (954) 786-4098. If the contract has already been awarded, please direct any queries and proof of the requisite insurance coverage to City staff responsible for oversight of the subject project/contract.

ORGANIZATION is responsible to deliver to the CITY for timely review and written approval/disapproval Certificates of Insurance which evidence that all insurance required hereunder is in full force and effect and which name on a primary basis, the CITY as an additional insured on all such coverage. Such policy or policies shall be issued by United States Treasury approved companies authorized to do business in the State of Florida. The policies shall be written on forms acceptable to the City's Risk Manager, meet a minimum financial A.M. Best and Company rating of no less than Excellent, and be part of the Florida Insurance Guarantee Association Act. No changes are to be made to these specifications without prior written approval of the City's Risk Manager.

Throughout the term of this Agreement, CITY, by and through its Risk Manager, reserve the right to review, modify, reject or accept any insurance policies required by this Agreement, including limits, coverages or endorsements. CITY reserves the right, but not the obligation, to review and reject any insurer providing coverage because of poor financial condition or failure to operate legally.

Failure to maintain the required insurance shall be considered an event of default. The requirements herein, as well as CITY's review or acceptance of insurance maintained by ORGANIZATION, are not intended to and shall not in any way limit or qualify the liabilities and obligations assumed by ORGANIZATION under this Agreement.

Throughout the term of this Agreement, ORGANIZATION and all subcontractors or other agents hereunder, shall, at their sole expense, maintain in full force and effect, the following insurance coverages and limits described herein, including endorsements.

A. Worker's Compensation Insurance covering all employees and providing benefits as required by Florida Statute, Chapter 440, regardless of the size of the company (number of employees) or the state in which the work is to be performed or of the state in which the ORGANIZATION is obligated to pay compensation to employees engaged in the performance of the work. ORGANIZATION further agrees to be responsible for employment, control and conduct of its employees and for any injury sustained by such employees in the course of their employment.

B. Liability Insurance.

(1) Naming the City of Pompano Beach as an additional insured as City's interests may appear, on General Liability Insurance only, relative to claims which arise from

ORGANIZATION'S negligent acts or omissions in connection with Contractor's performance under this Agreement.

(2) Such Liability insurance shall include the following checked types of insurance and indicated minimum policy limits.

**Type of Insurance**

**Limits of Liability**

**GENERAL LIABILITY:**

Minimum \$1,000,000 Per Occurrence and  
\$2,000,000 Per Aggregate

\* Policy to be written on a claims incurred basis

XX	comprehensive form	bodily injury and property damage
XX	premises - operations	bodily injury and property damage
—	explosion & collapse hazard	
—	underground hazard	
XX	products/completed operations hazard	bodily injury and property damage combined
XX	contractual insurance	bodily injury and property damage combined
XX	broad form property damage	bodily injury and property damage combined
XX	independent contractors	personal injury
XX	personal injury	
XX	sexual abuse/molestation	Minimum \$1,000,000 Per Occurrence and Aggregate
—	liquor legal liability	Minimum \$1,000,000 Per Occurrence and Aggregate

**AUTOMOBILE LIABILITY:**

Minimum \$10,000/\$20,000/\$10,000

XX comprehensive form  
XX owned  
XX hired  
XX non-owned

**REAL & PERSONAL PROPERTY**

— comprehensive form Agent must show proof they have this coverage.

**EXCESS LIABILITY**

Per Occurrence Aggregate

—	other than umbrella	bodily injury and property damage combined	\$1,000,000	\$1,000,000
---	---------------------	--	-------------	-------------

**PROFESSIONAL LIABILITY**

Per Occurrence Aggregate

— \* Policy to be written on a claims made basis \$1,000,000 \$1,000,000



(3) If Professional Liability insurance is required, Contractor agrees the indemnification and hold harmless provisions of Section 12 of the Agreement shall survive the termination or expiration of the Agreement for a period of three (3) years unless terminated sooner by the applicable statute of limitations.

C. Employer's Liability. ORGANIZATION and all subcontractors shall, for the benefit of their employees, provide, carry, maintain and pay for Employer's Liability Insurance in the minimum amount of One Hundred Thousand Dollars (\$100,000.00) per employee, Five Hundred Thousand Dollars (\$500,000) per aggregate.

D. Policies. Whenever, under the provisions of this Agreement, insurance is required of the ORGANIZATION, the ORGANIZATION shall promptly provide the following:

- (1) Certificates of Insurance evidencing the required coverage;
- (2) Names and addresses of companies providing coverage;
- (3) Effective and expiration dates of policies; and
- (4) A provision in all policies affording CITY thirty (30) days written notice by a carrier of any cancellation or material change in any policy.

E. Insurance Cancellation or Modification. Should any of the required insurance policies be canceled before the expiration date, or modified or substantially modified, the issuing company shall provide thirty (30) days written notice to the CITY.

F. Waiver of Subrogation. ORGANIZATION hereby waives any and all right of subrogation against the CITY, its officers, employees and agents for each required policy. When required by the insurer, or should a policy condition not permit an insured to enter into a pre-loss agreement to waive subrogation without an endorsement, then ORGANIZATION shall notify the insurer and request the policy be endorsed with a Waiver of Transfer of Rights of Recovery Against Others, or its equivalent. This Waiver of Subrogation requirement shall not apply to any policy which includes a condition to the policy not specifically prohibiting such an endorsement, or voids coverage should ORGANIZATION enter into such an agreement on a pre-loss basis.

**ACORD**<sup>TM</sup>**CERTIFICATE OF LIABILITY INSURANCE**

DATE (MM/DD/YYYY)

09/07/2021

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an **ADDITIONAL INSURED**, the policy(ies) must have **ADDITIONAL INSURED** provisions or be endorsed. If **SUBROGATION** IS **WAIVED**, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer any rights to the certificate holder in lieu of such endorsement(s).

<b>PRODUCER</b> <b>USI Insurance Services, LLC</b> <b>6501 S. Fiddlers Green Cir</b> <b>Greenwood Village, CO 80111</b> <b>303 837-8500</b>	<b>CONTACT NAME:</b> Rita Nicholson <b>PHONE (A/C, No, Ext):</b> 303 863-6238 <b>FAX (A/C, No):</b> <b>E-MAIL ADDRESS:</b> den.certificate@usi.com <b>INSURER(S) AFFORDING COVERAGE</b> <b>INSURER A:</b> Federal Insurance Company <b>NAIC #</b> 20281 <b>INSURER B:</b> National Fire & Marine Insurance Co. <b>20079</b> <b>INSURER C:</b> <b>INSURER D:</b> <b>INSURER E:</b> <b>INSURER F:</b>
<b>INSURED</b> <b>Junior Achievement USA</b> <b>One Education Way</b> <b>Colorado Springs, CO 80906</b>	

**COVERAGES****CERTIFICATE NUMBER:****REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:			35788663	08/01/2021	07/01/2022	EACH OCCURRENCE \$1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$1,000,000 MED EXP (Any one person) \$10,000 PERSONAL & ADV INJURY \$1,000,000 GENERAL AGGREGATE \$2,000,000 PRODUCTS - COMP/OP AGG \$1,000,000 \$
A	AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO OWNED AUTOS ONLY <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS NON-OWNED AUTOS ONLY			74969872	08/01/2021	07/01/2022	COMBINED SINGLE LIMIT (Ea accident) \$1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
B	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> EXCESS LIAB <input checked="" type="checkbox"/> RETENTION \$10000			42UMC10002108	08/01/2021	07/01/2022	EACH OCCURRENCE \$15,000,000 AGGREGATE \$15,000,000 \$
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? <input checked="" type="checkbox"/> N (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below		N/A	71753906	08/01/2021	07/01/2022	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$1,000,000 E.L. DISEASE - EA EMPLOYEE \$1,000,000 E.L. DISEASE - POLICY LIMIT \$1,000,000
A	Liquor Liability			35788663	08/01/2021	07/01/2022	\$1,000,000 Limit \$1,000 Deductible

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

**RE: Junior Achievement of South Florida.**

The General Liability includes an automatic Additional Insured endorsement that provides Additional Insured status to The City of Pompano Beach, only when there is a written contract that requires such status.

**APPROVED**

By Danielle Thorpe at 3:17 pm, Sep 08, 2021

**CERTIFICATE HOLDER****CANCELLATION**

The City of Pompano Beach  
 100 W. Atlantic Boulevard  
 Pompano Beach, FL 33060

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE



This page has been left blank intentionally.



**APPROVED**

*By Danielle Thorpe at 5:52 pm, Aug 24, 2021*

**FLORIDA AUTOMOBILE INSURANCE IDENTIFICATION CARD  
THE STANDARD FIRE INSURANCE COMPANY**

**POLICY NUMBER - COMPANY CODE**      **EFFECTIVE DATE**  
608069803 203 1 - 01760      06/23/2021

☒ **PERSONAL INJURY PROTECTION BENEFITS/** ☒ **BODILY INJURY**  
**PROPERTY DAMAGE LIABILITY**      **LIABILITY**

**NAMED INSURED**  
LAURIE SALLARULO

**YEAR/MAKE**      **VEHICLE IDENTIFICATION NUMBER (VIN)**  
19/AUDI      WAUP2AF2XKN124321

NOT VALID MORE THAN ONE YEAR FROM EFFECTIVE DATE

**AGENT/CASE**      **AGENT CODE**  
ASSOCIATED BUSINESS INS      0HJ986

**Please detach your card(s) and cut along dotted lines.**

**In case of an accident, once you are in a safe location:**

- Contact us at **Travelers.com** or 1.800.252.4633 to report a claim or to answer your questions regarding filing a claim
- Take photos of the accident scene and all vehicles/property damage if you can do so safely
- Obtain the name and contact information for each driver, passenger, or witness and each vehicles' insurance details, license plate state and number
- Do not discuss who caused the accident with anyone other than the police or a Travelers representative

Rental Car Coverage is provided. See Outline of Coverage.

THIS FORM DOES NOT CONSTITUTE PART OF YOUR POLICY. REFER TO YOUR POLICY FOR APPLICABLE COVERAGE AND EXCLUSIONS.

**MISREPRESENTATION OF INSURANCE IS A FIRST DEGREE MISDEMEANOR.**

**TRAVELERS** 