

PROPOSAL FOR SERVICE

Recipient: State of Arkansas Bureau of Legislative Research  
RFP Number: BLR-170001  
Commodity: Tax Reform Consulting Services  
Date: August 10, 2017  
Delivered To: 500 Woodlane Street, Room 315 Little Rock, AR 72201

Company Name: WC Mitchell & Associates, Inc  
Name: Monica Jenious, MBA, EA  
Title: CEO  
Address: 201 W. Broadway St., Ste. F North Little Rock, AR 72114  
Telephone Number: 501-324-2690  
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E-mail address: [mjenious@wctaxes.org](mailto:mjenious@wctaxes.org)

Signature: \_\_\_\_\_

## INTRODUCTION

1.0 This paragraph has been read and is agreed to.

## ISSUING AGENCY

1.1 This paragraph has been read and is agreed to

## SCHEDULE OF EVENTS

1.2 This paragraph has been read and is agreed to

## CAUTION TO VENDORS

1.3 This paragraph has been read and is agreed to

## RFP FORMAT

1.4 This paragraph has been read and is agreed to

## ALTERATION OF ORIGINAL RFP DOCUMENTS

1.5 This paragraph has been read and is agreed to

## REQUIREMENTS OF AMENDMENT

1.6 This paragraph has been read and is agreed to

## RFP QUESTIONS

1.7 This paragraph has been read and is agreed to

## SEALED PRICES/COST

1.8 This paragraph has been read and is agreed to

## PROPRIETARY INFORMATION

1.9 This paragraph has been read and is agreed to

## DELIVERY OF RESPONSE DOCUMENTS

1.10 This paragraph has been read and is agreed to

BID EVALUATION

1.11 This paragraph has been read and is agreed to

ORAL AND/OR WRITTEN PRESENTATIONS/DEMONSTRATIONS

1.12 This paragraph has been read and is agreed to

INTENT TO AWARD

1.13 This paragraph has been read and is agreed to

APPEALS

1.14 This paragraph has been read and is agreed to

PAST PERFORMANCE

1.15 This paragraph has been read and is agreed to

TYPE OF CONTRACT

1.16 This paragraph has been read and is agreed to

PAYMENT AND INVOICE PROVISIONS

1.17 This paragraph has been read and is agreed to

PRIME CONTRACTOR RESPONSIBILITY

1.18 This paragraph has been read and is agreed to

DELEGATION OR ASSIGNMENT

1.19 This paragraph has been read and is agreed to

CONDITIONS OF CONTRACT

1.20 This paragraph has been read and is agreed to

STATEMENT OF LIABILITY

1.21 This paragraph has been read and is agreed to

AWARD RESPONSIBILITY

1.22 This paragraph has been read and is agreed to

INDEPENDENT PRICE DETERMINATION

1.23 This paragraph has been read and is agreed to

PUBLICITY

1.24 This paragraph has been read and is agreed to

CONFIDENTIALITY

1.25 This paragraph has been read and is agreed to

PROPOSAL TENURE

1.26 This paragraph has been read and is agreed to

WARRANTIES

1.27 This paragraph has been read and is agreed to

CONTRACT TERMINATION

1.28 This paragraph has been read and is agreed to

VENDOR QUALIFICATIONS

1.29 This paragraph has been read and is agreed to

NEGOTIATIONS

1.30 This paragraph has been read and is agreed to

LICENSES AND PERMITS

1.31 This paragraph has been read and is agreed to

OWNERSHIP OF DATA & MATERIALS

1.32 This paragraph has been read and is agreed to

## OVERVIEW

### TAX REFORM AND RELIEF ACT OF 2017 OVERVIEW

2.0 WC Mitchell & Associates, Inc, and its agents, propose to provide Tax Reform Consulting Services to the State of Arkansas Bureau of Legislative Research as outlined in the Request for Proposal number BLR-170001.

### OBJECTIVES

2.1 WC Mitchell & Associates, Inc will provide information requested in a timely manner to assist the Task Force in compiling its preliminary report due December 1, 2017 and a final report due September 1, 2018.

### SCOPE OF WORK/SPECIFICATIONS

3.0 WC Mitchell & Associates, Inc. understands the objective of these services is to provide the members of the Arkansas General Assembly detailed and accurate information concerning the state of tax laws and their impact in the State of Arkansas, as well as recommendations for legislative changes. As outlined in RFP number BLR-170001, these recommended changes are to modernize and simplify the Arkansas tax code, make the Arkansas tax laws competitive with other states in order to attract businesses to the State, create jobs within the State, and ensure fairness to individuals and entities impacted by the tax laws of the State of Arkansas.

### TAX REFORM CONSULTING

3.1 WC Mitchell & Associates, Inc. will provide tax reform consulting services to the Task Force, addressing the specifications and requirements stated in the proposal. WC Mitchell & Associates is prepared to provide the required accurate and detailed reports to include monthly status updates, answers to research requests, assistance with draft legislation, preliminary report and final report. WC Mitchell & Associates, and its agents, are also prepared to attend meetings of the Task Force and other legislative committees.

### PROCUREMENT OF GOODS AND SERVICES

3.2 WC Mitchell & Associates, Inc. may need to procure special analysis, studies, whitepapers, etc. as prepared by other consulting or advisory firms. Special analysis will be purchased if it is found that a thorough examination of a tax issue has been completed by an industry expert. Potential sources of analysis include Price Waterhouse Coopers Tax Projects Delivery Group, local accounting firms and practicing CPAs, and the Internal Revenue Service. A projection for this cost is stated in the Official Proposal Price Sheet (Attachment A).

COST PROPOSAL

COMPENSATION

4.0 WC Mitchell & Associates, Inc. acknowledges that compensation for tax reform consulting services shall be paid based upon the work performed as specified in the RFP. The Official Proposal Price Sheet (Attachment A) will list the hourly rates and anticipated costs required to complete the related tasks.

PAYMENT SCHEDULE

4.1 WC Mitchell & Associates, Inc. acknowledges that payment will be received based on the hour expended for approved projects on a monthly basis. Timesheets and other documentation will be available for all time billed to BLR for this project.

TRAVEL, LODGING & MEALS

4.2 WC Mitchell & Associates, Inc. acknowledges that expenses incurred for travel, lodging and meals will be reimbursed as allowed by law and relating to attending meetings of the Task Force and other legislative committees of the Arkansas General Assembly.

COMPREHENSIVE VENDOR INFORMATION

5.0 This paragraph has been read and is agreed to

VENDOR PROFILE

5.1 Vendor Profile

Business Name: WC Mitchell & Associates, Inc.  
 Business Address: 201 W. Broadway St., Ste F North Little Rock, AR 72114  
 Primary Contact: Monica Jenious, CEO, phone (501) 324-2690, fax (501) 324-2692,  
 e-mail [mjenious@wctaxes.org](mailto:mjenious@wctaxes.org)  
 Year in Business: 23 years in business, established 1994  
 Proof of qualification to do business in Arkansas:  
 See attached Articles of Incorporation and 2017 Business Privilege License  
 Officers: WC Mitchell [REDACTED]  
 Monica Jenious [REDACTED]  
 Aundrei Jenious [REDACTED]

Note: WC Mitchell & Associates is a Veteran-owned and Minority-owned business.

A disclosure of all the states and jurisdictions in which WC Mitchell & Associates, Inc. does business and the nature of the business for each state or jurisdiction

Arkansas	Tax consulting and preparation, payroll management, business coaching, bookkeeping, financial statement preparation, training seminars
Tennessee	Tax consulting and preparation, business coaching, bookkeeping, financial statement preparation

A disclosure of all the states and jurisdictions in which WC Mitchell & Associates, Inc. has contracts to supply tax reform consulting services and the nature of the goods or services involved for state or jurisdiction.

N/A

A disclosure of the details of any finding or plea, conviction, or adjudication of guilt in a state or federal court for any felony or any other criminal offense other than a traffic violation committed by persons identified as management, supervisory, or key personnel.

N/A

A disclosure of the details of any bankruptcy, insolvency, reorganization, or corporate or individual purchase or takeover of another corporation, including without limitation bonded indebtedness, and any pending litigation of WC Mitchell & Associates, Inc.

N/A

A disclosure of any conflicts of interest on the part of WC Mitchell & Associates, Inc. or its personnel that will be working on this project, especially regarding financial interests that would be impacted depending on the recommendations ultimately made by the Task Force.

N/A

Additional disclosures and information that the Task Force may determine to be appropriate for the procurement involved.

N/A

## GENERAL INFORMATION

5.2 WC Mitchell & Associates has provided tax preparation, tax consultation, small business financial management services, payroll management services, credit counseling services and religious and non-profit financial management services since 1994. Our commitment to the individual taxpayers, small business community, and faith-based and non-profit communities is evident through our service and tenure. We are committed to ongoing learning so that we may serve our clients and our communities with sound financial advice and guidance as it relates to their financial and tax situations. Functional expertise of available staff members includes:

- An average of 18 years of experience in tax preparation and tax debt resolution for both federal and state taxes.
- Over 15 years in corporate finance and accounting experience including specialized financial analysis and modeling, financial statement preparation and analysis, mergers and acquisitions due diligence, and institutional investment analysis
- Tax law research and analysis
- Retirement plan implementation and personal financial planning
- Small business start-up consulting
- Executive decision support

## DISCLOSURE OF LITIGATION

5.3 Neither WC Mitchell & Associates, nor its agents, are currently involved in or party to any criminal or civil litigation or indictment involving any of its joint ventures, strategic partners, prime contractor team members, or subcontractors.

## EXECUTIVE SUMMARY

5.4 WC Mitchell & Associates will perform the obligations of the proposal in a chronological and methodical manner consistent with the requirements and project objectives. Upon the acceptance of the project, our team will begin work on the Preliminary Report due December 1, 2017. The first stage to completing this report will be an assessment of the most pressing issues relating to the primary objectives of the proposal; namely, job creation, small business concerns, and simplification of the Arkansas tax code. In addition, pending legislation related to the Affordable Care Act and estate and corporate taxation will be analyzed to determine the impact to the State.

After attending Task Force meetings, a consolidated list will be created, with research conducted on each issue, relating specifically to project objectives. Support staff will be utilized to gather reports, special analysis, and white papers on each topic, while professional staff will review and analyze changes. Each topic will be summarized and reported on a monthly and ad hoc basis to the Task Force.

Based on the feedback and directives received on the preliminary report from the Task Force, subsequent research, analysis and modeling on each topic area will be conducted and summarized for discussion and finally, inclusion into the Final Report due September 1, 2018.

## VENDOR'S QUALIFICATIONS

5.5 WC Mitchell & Associates, Inc. was incorporated November 14, 1994 by Rev. W. C. Mitchell, Enrolled Agent. For over 20 years, WC Mitchell & Associates has prepared tax returns for thousands of individuals, businesses, faith-based organizations, and non-profit organizations in the state of Arkansas. In addition, our firm has been utilized extensively to provide small business support services including accounting,



bookkeeping, payroll management, executive decision support, marketing, compliance training, and consulting. WC Mitchell & Associates is located at 201 W. Broadway St., Ste F North Little Rock, AR 72114.

## BIOS

### Rev. W.C. Mitchell – Founder

Rev. W.C. Mitchell, a US Army veteran with over 20 years' service, founded WC Mitchell & Associates to serve the greater Little Rock community in the areas of tax preparation, debt counseling, and small business support services. Rev. Mitchell is a resource in the faith-based community, having provided training, payroll management and financial consulting for over 100 organizations. WC Mitchell is passionate about keeping faith based organizations in compliance with all IRS and State regulations. He holds a Bachelor of Science from Park College and has been a registered tax preparer and IRS Enrolled Agent for over 20 years.

### Monica Jenious – CEO

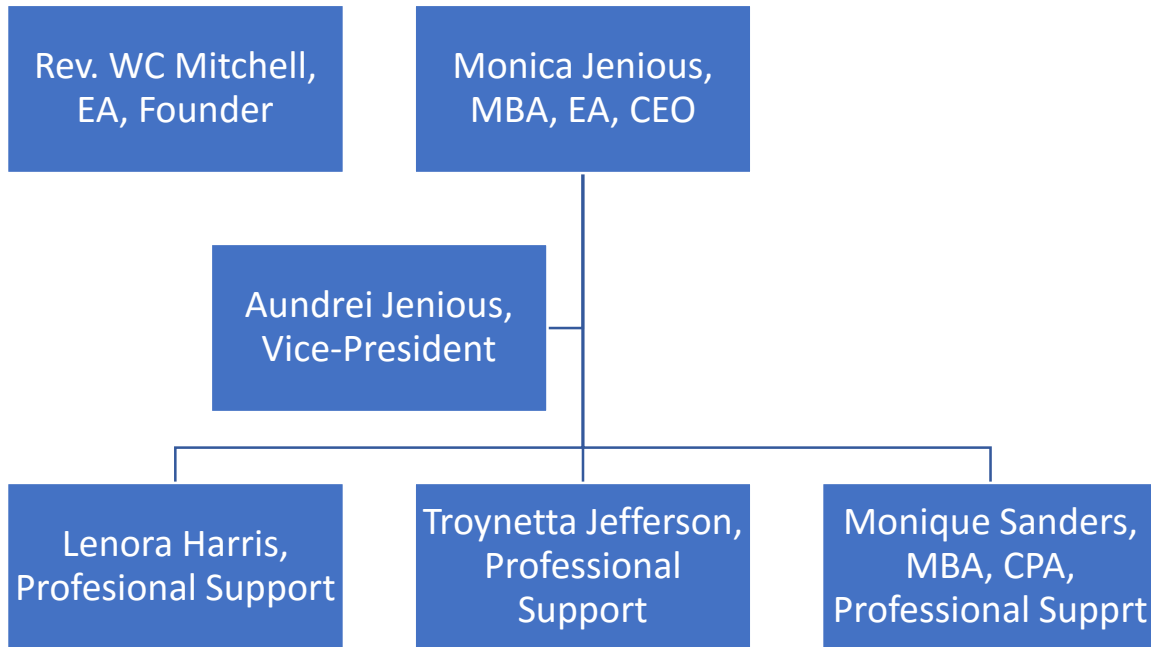
Monica Jenious brings over 15 years of corporate finance and accounting experience with previous roles including Manager – Financial Reporting & Analysis, Senior Financial Analyst, and Investment Analysis. With experience encompassing tax consulting, small business coaching, and personal financial management, Monica brings a corporate eye to the small business environment and seeks to serve the local community. Monica holds a Bachelor of Business Administration in Finance from the University of Memphis, a Bachelor of Science in Accounting from Saint Leo University and a Master of Business Administration in both Accounting and Health Care Management from Saint Leo University. Monica is also an IRS Enrolled Agent.

### Aundrei Jenious, – Vice President

Aundrei Jenious has over 15 years of experience in personal financial planning, commercial banking, tax consulting and risk management strategies. Having served as benefits planner, personal financial consultant, and commercial lender, Aundrei brings a strong skillset to the team, viewing tax and other finance matters with consideration to personal risk tolerance and the impact on one's estate. Aundrei is a registered tax preparer and holds a Bachelor of Science in Marketing from Saint Leo University.

Monica Jenious will lead the project, while Aundrei Jenious will serve as lead researcher. Additional staff will include Troynetta Jefferson (professional support), Lenora Harris (professional support), Monique Sanders, CPA (professional support) and Carla Terrell (support staff). Aundrei will lead the research efforts, outlining the scope of work for each of the professional support. Monica will summarize and create monthly and ad hoc Task Force reports, summarizing findings and recommendations. The staff will be available within 3 working days of the contract award.

No comparable contracts have been completed to date.



#### VENDOR REFERENCES

Vendor: WC Mitchell & Associates, Inc  
 Recipient: State of Arkansas Bureau of Legislative Research  
 RFP Number: BLR-170001  
 Commodity: Tax Reform Consulting Services  
 Date: July 10, 2017  
 Delivered To: 500 Woodlane Street, Room 315 Little Rock, AR 72201

Robinson Mortuary  
 Attn: Kenneth or Kenbria Robinson  
 1201 Dr. Martin Luther King Drive Little Rock, AR 72202

Pleasant View Ministries  
 Attn: Natasha Willingham  
 1117 N. Palm Street Pine Bluff, AR 71601-2933

Bail Bond by Charles Pearson  
 Attn: Jacqueline Pearson  
 1241 South Chester Street Little Rock, AR 72202

Faith Enterprises, Inc.  
 Attn: Malcolm Keener  
 PO Box 222 North Little Rock, AR 72115

RFP Number: BLR-170002  
 CONFIDENTIAL

Listing of current accounts with their tenure as clients.

Company	Tenure (in years)
1st Baptist Church (901 Calhoun)	4
1st Baptist Church (Highland Park)	6
1st Missionary Baptist Church (Pine Bluff)	9
Abundant Life	2
All Safe Pro	1
Ann's Beauty Supply	5
Bail Bonds by Charles Pearson	21
Bethesda Missionary Baptist Church	10
Calvary Baptist Church of McAlmont	11
Faith Beauty Supply	16
Faithful Temple	4
Fredy's Auto Repair	1
Grandma's House	1
Greater Faith	2
Greater Rose of Sharon Baptist Church	7
Holy Cross Baptist Church	8
Kingdom of God Ministries	2
Kitchen Express	5
Led by the Spirit of God Church	3
Little Dumplings Day Care	6
Macedonia Baptist Church	8
Mt Gale Baptist Church	10
Mt. Olive Missionary Baptist Church	13
New Home Baptist Church	7
Pilgrim Progress Baptist Church	5
Pleasant View Ministries	8
Prayer Garden COGIC	1
Robinson Mortuary	4
Serenity Funeral Home	4
The Worship Center COGIC	1
United Missionary Baptist Church	1

## BACKGROUND INVESTIGATION

5.5.1 WC Mitchell & Associates will allow the BLR to perform an investigation of the financial responsibility, security, and integrity of its agents if required by the Task Force.

## SUBCONTRACTOR IDENTIFICATION

5.6 WC Mitchell & Associates does not intend to subcontract with any other business for the purpose of this contract.

## EVALUATION CRITERIA FOR SELECTION

### GENERALLY

6.0 This paragraph has been read and is agreed to

### EVALUATION CRITERIA

6.1 This paragraph has been read and is agreed to