



# CITY OF SAN ANTONIO

## Contracts Disclosure Form

Please print completed form and submit with proposal to originating department. All questions must be answered.

For details on use of this form, see Section 2-59 through 2-61 of the City's Ethics Code.

\*This is a:  New Submission  Correction  Update to previous submission

### \*1) Name of person submitting this disclosure form.

* First	M.I.	* Last	Suffix
Amanda	E	Eaves	CPA

### \*2) Contract Information

#### a) Contract or Project Name:

Independent External Audit Services - RFP 22-002; RFx 6100014751

#### b) Originating Department:

Finance

### \*3) Disclosure of parties, owners, and closely related persons.

#### a) Name of individual(s) or entity(ies) seeking a contract with the city. (NOTE: Give exact legal name as it will appear on the contract, if awarded.)

##### Name

FORVIS, LLP

#### b) Name and title of contract signatory

##### Name

##### Title

Amanda E. Eaves, CPA

Partner

#### c) Name of all owners, board members, executive committee members, and officers of entities listed in question 3a.

##### Type

##### Name

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Owner	Please see our complete list, as well as a list of our governing board members, at the end of this document.
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Board Member	Please see our complete list, as well as a list of our governing board members, at the end of this document.
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**\*4) List any individual(s) or entity(ies) that is a partner, parent, joint venture, or subsidiary entity(ies) of the individual or entity listed in Question 3.**

- Not applicable. Contracting party(ies) does not have partner, parent, joint venture, or subsidiary entities.
- Names of partner, parent, joint venture or subsidiary entities, and all the owners, board members, executive committee members, and officers of each entity:

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Type	Name
Subsidiary entity(ies) of the individual or entity listed	FORVIS Capital Advisors, LLC
Subsidiary entity(ies) of the individual or entity listed	FORVIS Foundation
Subsidiary entity(ies) of the individual or entity listed	FORVIS Wealth Advisors, LLC
Subsidiary entity(ies) of the individual or entity listed	FORVIS Agency, LLC
Subsidiary entity(ies) of the individual or entity listed	FORVIS Global Advisory Ltd.
Subsidiary entity(ies) of the individual or entity listed	FORVIS Corporate Finance, LLC

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**Names of owners, executive committee members, officers, partners, and directors:**

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Type	Name
Owner	Please see our complete list, as well as a list of our governing board members, at the end of this document.

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**\*5) List any individuals or entities that will be subcontractors on this contract.**

- Not applicable. No subcontractors will be retained for this contract.
- Subcontractors may be retained, but have not been selected at the time of this submission.
- List of subcontractors, including the name of the owner(s), and business name:

Owner	Business Name
Robert J. Williams	Robert J. Williams, CPA
Leann Ussery, CPA; Deborah F. Fraser, CPA; Phil S. Vaughan, CPA	Armstrong, Vaughan & Associates, PC
Derek Schriver, Christopher Carmona	Shriver, Carmona & Company, PLLC
Theresa Y. Britts	Britts & Associates, LLP

**\*6) List any attorneys, lobbyists, or consultants retained by any individuals listed in Questions 3, 4, or 5 to assist in seeking this contract.**

- Not applicable. No attorneys, lobbyists, or consultants have been retained to assist in seeking this contract.**
- List of attorneys, lobbyists, or consultants retained to assist in seeking this contract:**

**\*7) Disclosure of political contributions.**

List any campaign or officeholder contributions made by the following individuals in the past 24 months to any current member of City Council, former member of City Council, any candidate for City Council, or to any political action committee that contributes to City Council elections:

- a. any individual seeking contract with the city (Question 3)
  - b. any owner or officer of entity seeking contract with the city (Question 3)
  - c. any individual or owner or officer of an entity listed above as a partner, parent, or subsidiary business (Question 4)
  - d. any subcontractor or owner/officer of subcontracting entity retained for the contract (Question 5)
  - e. the spouse of any individual listed in response to (a) through (d) above
  - f. any attorney, lobbyist, or consultant retained to assist in seeking contract (Question 6)
- Not applicable. No campaign or officeholder contributions have been made in preceding 24 months by these individuals.**
- List of contributions:**

**Updates on Contributions Required**

Information regarding contributions must be updated by submission of a revised form from the date of the submission of this form, up through the time City Council takes action on the contract identified in response to Question 2 and continuing for 30 calendar days after the contract has been awarded.

**Notice Regarding Contribution Prohibitions for "High-Profile" Contracts**

Under Section 2-309 of the Municipal Campaign Finance Code, the following listed individuals are prohibited from making a campaign or officeholder contribution to any member of City Council, candidate for City Council or political action committee that contributes to City Council elections from the 10th business day after a contract solicitation has been released until 30 calendar days after the contract has been awarded:

- a. Any individual seeking a high-profile contract;
- b. Any owner, officer, officer of board, and executive committee member of an entity seeking a high-profile contract, excluding board officers and executive committee members of 501(c)(3), 501(c)(4) and 501(c)(6) non-profit organizations not created or controlled by the City whose board service is done strictly as a volunteer with no financial compensation and no economic gain from the non-profit entity;
- c. The legal signatory of the high-profile contract;
- d. Any attorney, lobbyist or consultant hired or retained to assist the individual or entity in seeking a high-profile contract;
- e. Subcontractors hired or retained to provide services under the high-profile contract; and
- f. Any first-degree member of the household of any person listed in (1), (2), (3) or (5) of this subsection.

**Penalty.** A high-profile contract cannot be awarded to the individual or entity if a prohibited contribution has been made by any of these individuals during the contribution "black-out" period, which is the 10th business day after a solicitation has been released until 30 calendar days after the contract has been awarded.

### **\*8) Disclosure of conflict of interest.**

Are you aware of any fact(s) with regard to this contract that would raise a "conflict of interest" issue under Sections 2-43 or 2-44 of the City Ethics Code for any City Council member or board/commission member that has not or will not be raised by these city officials?

- I am not aware of any conflict(s) of interest issues under Section 2-43 or 2-44 of the City Ethics Code for members of City Council or a city board/commission.**
- I am aware of the following conflict(s) of interest:**

### **\*9) Prohibited Interest in Contracts.**

Currently, or within the past twelve (12) months, have you, your spouse, sibling, parent, child or other family member within the first degree of consanguinity or affinity served on a City board or commission?

- No**
- Yes**

Currently, or within the past twelve (12) months, has an owner, partner or employee of a business entity in which you, your spouse, parent, child own 10% or more of the voting stock or shares, or 10% or more of the fair market value served on a City board or commission?

- No**
- Yes**

Currently, or within the past twelve (12) months, has an owner, partner, or employee of a business entity who owns 10% or more of the voting stock or shares, or 10% or more of the fair market value, that will be a subcontractor for this contract, served on a City board or commission?

- No**
- Yes**

### **Notice Regarding Prohibited Interest in Contracts.**

Please be aware, the City's Charter and Ethics Code prohibits members of certain more-than-advisory boards and commissions, as well as their close family members and any businesses they or their families hold a 10% or greater ownership interest from obtaining a contract with the City during their board or commission service. The prohibition extends to subcontracts on City contracts, and would also apply to parent, subsidiary or partner businesses owned by the member of the board or commission and their family. Please see Section 141 of the City Charter and Section 2-52 of the City Ethics Code (Prohibited Interests in Contracts) for complete information.

Former members of certain more-than-advisory boards and commissions, their family members and the businesses they own will continue to be prohibited from obtaining any discretionary contracts for one year after leaving City service. Please see Section 2-58 of the City Ethics Code (Prohibited Interest in Discretionary Contracts) for complete information.

Please note that any contract in place at the time the applicant becomes a City officer may remain in effect, but cannot be amended, extended, modified, or changed in any manner during the officer's City service on the more-than-advisory board.

If you have any questions, please contact the Office of the City Attorney to request to speak with a member of the Ethics staff: (210) 207-8940

## **Acknowledgements**

### **\*1. Updates Required**

- I understand that this form must be updated by submission of a revised form if there is any change in the information before the discretionary contract, housing and retail development incentive, or the purchase, sale, or lease of real estate to or from the City is the subject of action by the City Council, and no later than 5 business days after any change has occurred, whichever comes first. This includes information about political contributions made after the initial submission and up until 30 calendar days after contract has been awarded.

**\*2. No Contact with City Officials or Staff during Contract Evaluation**

- I understand that a person or entity who seeks or applies for a city contract or any other person acting on behalf of that person or entity is prohibited from contacting city officials and employees regarding the contract after a Request for Proposal (RFP), Request for Qualification (RFQ), or other solicitation has been released.

This no-contact provision shall conclude when the contract is posted as a City Council agenda item. If contact is required with city officials or employees, the contact will take place in accordance with procedures incorporated into the solicitation documents. Violation of this prohibited contacts provision set out in Section 2-61 of the City Ethics Code by respondents or their agents may lead to disqualification of their offer from consideration.

**\*3. Contribution Prohibitions for "High-Profile" Contracts**

- This is not a high-profile contract.
- This is a high-profile contract.

- I acknowledge that this contract has been designated as a high-profile contract by the city. I further acknowledge that the following individuals are prohibited from making campaign or officeholder contributions to members of City Council, candidates for City Council, or political action committees that make contributions to City Council elections from the 10th business day after the solicitation has been released until 30 calendar days after the contract has been awarded: legal signatory to contract individual(s) seeking the contract, owner or officer of an entity seeking the contract, the spouse of any of these individuals, and any attorney, lobbyist, or consultant retained to assist in seeking the contract.

- I warrant that no contributions have been made by these individuals in violation of Section 2-309 of the Municipal Campaign Finance Code.

**\*4. Conflicts of Interest Questionnaire (CIQ)**

Chapter 176 of the Local Government Code requires all contractors and vendors to submit a Conflict of Interest Questionnaire Form (CIQ) to the Office of the City Clerk, even if contract is not designated as "High Profile".

- I acknowledge that I have been advised of the requirement to file a CIQ form under Chapter 176 of the Local Government Code.

**\*Oath**

- I swear or affirm that the statements contained in this Contracts Disclosure Form, including any attachments, to the best of my knowledge and belief are true, correct, and complete.

**\* Your Name:**

**Title:**

**\* Company Name or DBA:**

**Date:**

Please print completed form and submit with proposal to originating department. All questions must be answered.

If necessary to mail, send to:

Purchasing

P.O. Box 839966  
San Antonio, Texas 78283-3966

GR.1075-01.PUR.REPORT.Contracts Disclosure Form  
Rev. 09/07/2021

## Governing Board

FORVIS' Governing Board consists of the following individuals:

- Governing Board Chair Matt Snow
- Chief Executive Officer Tom Watson
- Managing Partner Aprille Belle
- Managing Partner David Evans
- Managing Partner Gary Schafer
- National Industry Partner Holly Pantzer
- Regional Managing Partner Jerry Henderson
- Managing Partner Jon McDowell
- Regional Managing Partner Kimberly McKay
- Chief Practice Officer Rob Pruitt
- Regional Managing Partner Thomas Boothby
- Managing Partner Lori Haley
- Managing Partner Trey Ackerman

## List of Partners & Principals

Forvis' partners and principals include:

- Trey Ackerman
- Bryan Bodnar
- Tim Chitwood
- Eric DeCoursey
- Derek Adams
- Jason Bombeck
- Will Choi
- Julie Dee
- Barry Adamson
- Thomas Boothby
- Matt Church
- Dave DeMille
- Tim Adler
- Jason Borden
- Anthony Clark
- Feargus Dent
- Lyle Alexander
- Michael Bordoni
- Chris Clark
- Don DeSoto
- Jeff Allen
- Scott Bormet
- Meagan Clark
- Koy Dever
- Heather Alley
- David Botzis
- Nathan Clark
- Robyn Devore
- Chuck Alt
- John Bourquard
- Cheryl Clauson
- David Dills
- Brian Anderson
- Cindy Boyle
- Lori Cochran
- Don Dismuke
- James Anderson
- Robert Bradham
- Matt Coffey
- Gordon Dobner
- Denny Ard
- Sue Brammer
- Abe Cole
- Donna Doerhoff
- Rachel Arendt
- Bob Brandenburg
- Richard Cole
- Chris Doolittle
- Jim Ashley
- Michelle Brekken
- David Coleman
- Gordon Douglas
- Scott Austin
- Scott Brezler
- Jessica Coniglio
- Scott Dowling
- Chad Back
- Kristen Bright
- Lindsay Conley
- Brett Dudney
- Tripp Bacon
- Liz Britton
- Robert Conner
- Shaun Duffin
- David Baggett
- Brad Brotherton
- Heather Cozart
- Dan Duir
- Tony Balistreri
- Chris Brown
- Mike Crawford
- Neely Duncan
- Allison Ballard
- Donna Bruce
- Wil Crawford
- Angie Dunlap
- Dan Barron
- John Bruce
- Jim Creeden
- Ashley Dunn
- Brian Beiser
- Brandy Buckler
- Mitch Crisp
- Rachel Dwiggin
- Aprille Bell
- Todd Burchett
- Ryan Crowe
- Kevin Dyck
- Doug Bennett
- Rich Burke
- John Curry
- Joel Dzedzic
- Cara Benningfield
- Renda Burkhart
- Chris Dalton
- Michael Earls
- Marlon Bernal
- Brian Burns
- Eric Darr
- Gwyn Eastom
- Kurt Berry
- Connie Cagle
- Susan Davenport
- Amanda Eaves
- Scott Berte
- Bryan Callahan
- John Davis
- Dan Edelman
- Jeremy Betsill
- Kevin Callaway
- Lance Davis
- Charles Edge
- Amy Bibby
- Jeremy Carnahan
- Mike Davis
- Gary Edwards
- Randy Biernat
- Rick Carrier
- Robert Davis
- Nicholas Eichelman
- Joseph Blatt
- Natalie Centeno
- Jeff Deane
- Tim Eischeid
- David Bluemling
- Chip Chambley
- Buddy Dearman
- Joshua Elliott
- Allan Blum
- Lori Charlebois
- Marv Debner
- Thomas England



- Mike Engle
- Ashley Ensley
- David Evans
- Greg Faucette
- Stephanie Fenner
- David Fields
- Bill Finnecey
- Kerry Fitzgerald
- Bob Fitzula
- Jared Forman
- Michael Fortman
- Keith Foster
- Stani Fowler
- Julee Fox
- Monica Fraczek
- John Frank
- Steven Frank
- Marty Fredericks
- Dave Freeman
- Amy Frizzell
- Leslie Fry
- Louie Galbraith
- Liz Gantnier
- Chad Garber
- Mac Garber
- Chad Gassen
- Daniel Gaston
- Jody Gauthier
- Jon Gee
- Gary Genenbacher
- Michael Gerber
- Keith Giddens
- Troy Gilstorf
- Francis Godfrey
- Scott Gold
- Jerry Goolsby
- Kevin Gore
- Jeremy Goss
- Mike Gray
- Sherri Greenwood
- Gary Greer
- Sara Grenier
- John Griffin
- Shawn Grotte
- Barry Gumb
- Hal Guthrie
- Kristin Gutting
- Joel Haaser
- Rob Haight
- Lori Haley
- David Hall
- Kevin Hamernik
- Dustin Hamilton
- Michael Hanger
- Steve Hanni
- Jon Hansen
- Neal Hansen
- Charlie Hanshaw
- Jay Hargis
- Shaun Harms
- Jon Harris
- Rob Hartnett
- Kendall Haulotte
- Tom Hazelwood
- Leslie Hedrick  
Bates
- Kelly Hein
- Fred Helfrich
- David Henderson
- Jerry Henderson
- Joe Herting
- Kyle Hesemann
- Troy Hill
- Cary Hines
- Dave Hinshaw
- Julie Hipsky
- Jenifer Hitschmann
- Steve Holden
- Bud Hollenkamp
- Jacob Holman
- Howard Hong
- Kip Hooker
- Kathe Hoots
- Paul Hopkins
- Kevin Horn
- Olivia Host
- Ben Howard
- Christina Howard
- Matthew Howell
- Travis Hudson
- Timothy Hughes
- Luke Hume
- Scott Humphrey
- Mike Hurlburt
- Michelle Hurst
- Ryan Irby
- Tim Jackson
- Will James
- Corey Jennings
- Bob Johnson
- Jeff Johnson
- Melanie Johnson
- Dale Johnston
- Harry Johnston
- Chapin Jones
- Chris Jones
- Jennifer Jones
- Wanda Justus
- Mike Kelly
- Kevin Kemp
- Todd Kenney
- Justin Kensinger
- Peter Kern
- Jeff Kitterman
- Matt Klauser
- Andrew Klemens
- John Kmetz
- Ben Kohnle
- Janice Kong
- Paul Koster
- David Kot
- Chris Kramer
- Anthony Kruse
- Nikki Kubly
- Craig Kuechenberg
- Steve LaFrance
- Bob Lamb
- Clint Langford
- Adam Lawyer
- Jeff Layman
- Dave Leising
- Jeffrey Lenhart
- Cheryl Levesque
- Chad Lewis
- Jeff Lewis
- Scott Linch
- Chris Linck
- Chris Lindner
- Erik Lioy
- Todd Lisle
- Matt List
- Wayne Little
- Richard Livingston
- Kevin Locke

- Camille Lockhart
- Mark Lundy
- Tondee Lutterman
- Bryant Macaraeg
- Matthew Macdonald
- Rob MaCoy
- Allen Magee
- Brian Mall
- Louis Mannello
- Damien Martin
- David Mason
- Chris Masone
- John Mather
- Makayla Matheson
- Brian Matlock
- John May
- Mike McDevitt
- Jamie McDonald
- Jon McDowell
- Kieth McGovern
- Kimberly McKay
- Mary McKinley
- Wesley Mcleod
- Dennis Mclister
- Cindy McMaster
- Sharon McMichael
- Justin McNabb
- Don Mcneill
- John Meachum
- Trent Messick
- Rand Meyer
- Eric Mies
- Mark Miller
- Angela Miratsky-Figas
- Brian Mischel
- Ryne Montgomery
- Chad Moore
- Angela Morelock
- Kevin Morey
- Geron Morgan
- Matt Morris
- Norman Mosrie
- David Motsinger
- Beth Mullins
- Jennie Muniz
- Chris Murphy
- Elizabeth Murphy
- Rodney Murray
- Thomas Murtagh
- Brian Myeroff
- Jason Myers
- Joe Nadder
- Jeff Naig
- Kelly Necessary
- Will Neeriemer
- Trish Neidig
- Joe Nelson
- Mark Nicolas
- Dave Niles
- Stuart Nofsinger
- Jean Nyberg
- Lindsey Oakley
- Randy Oberdiek
- Robert Oden
- Rob Opitz
- Brian O'Reilly
- Michael Osinski
- Mike Ososki
- Nancy Ozuna
- Rick Paden
- Andy Page
- Kevin Pahud
- Jesse Palmer
- Prashant Panavalli
- Holly Pantzer
- Billy Parker
- Trent Parten
- Juli Pascoe
- Anthony Pasternak
- Alpa Patel
- Brian Pavona
- Todd Pefferman
- Tony Perazzo
- Bill Pickert
- Derek Pierce
- Mary Anne Pipkin
- Toug Pliilar
- Amber Popek
- Kelly Postlewaite
- Melissa Pozniak
- Harold Pratt-Thomas
- James Proctor
- Robert Pruitt
- Ann Puckett
- David Pulido
- Bert Purdy
- Adam Quattlebaum
- Patrick Quintana-Perron
- David Rabb
- Jason Rader
- David Rainey
- Fran Randall
- Jeff Rapaglia
- Bill Rasmussen IV
- Michael Rauchwarg
- Donald Rawe
- Kevin Rayfield
- Jon Redelsperger
- Ben Redman
- Anthony Reggiannini
- Jim Regnier
- Ryan Reiff
- Jesse Respress
- Greg Rexing
- Chris Ricchiuto
- Lindsey Richards
- Jessica Richter
- Andy Rinzel
- Kraig Ritter
- Tammy Rivera
- John Roberts
- Justin Roberts
- Becky Robins
- Eric Rogers
- William Rogers
- Russell Romanelli
- Ben Romeiser
- Jeff Ronsse
- Joe Roos
- Kevin Lee Ryals
- Ed Ryan
- Ben Sady
- Ed Salek
- Georgia Salinas
- Daniel Sanders
- Jennifer Sanders
- Isabel Santner
- Sarah Saunders
- Robin Sawyer
- Debbie Scanlon

- Gary Schafer
- Mark Schmadtke
- Nate Scott
- Steve Sears
- Keith Seeloff
- Michael Senko
- Brinn Serbanic
- Luke Sermersheim
- John Seymour
- Jimmy Sfiris
- Anna Shaferova
- Sal Shah
- Dave Sharkey
- Mark Sharp
- Kim Sheley
- Zach Shelton
- Travis Sherman
- Amy Shreck
- Patrick Shuler
- JoAnna Simek
- Brooke Simpson
- Ryan Sivill
- Travis Skinner
- Ernie Skyrme
- Stephen Slabaugh
- Jack Small
- Adam Smith
- Ashley Smith
- Brian Smith
- Derek Smith
- Erica Smith
- Jamie Smith
- Tim Smith
- Matt Snow
- Danielle Solomon
- Teri Sowder
- Scott Spohn
- Tony Spratte
- John Steffes
- Justin Stenberg
- Ken Stephens
- John Stewart
- Jim Still
- Jay Stine
- Chip Storey
- David Stotemyer
- Matt Stout
- Roy Strickland
- Jason Sullivan
- Bob Swartz
- Daron Tarlton
- David Tate
- David Taylor
- Greg Taylor
- Ken Taylor
- Tricia Teegardin
- Chris Telli
- Jimmy Ten Pas
- Scott Termine
- Dennis Theodossis
- Tara Theodossis
- Adam Thomas
- Rudy Thomas
- Paul Thompson
- Todd Thorson
- Kelly Thrift
- Randy Throener
- Brian Todd
- Craig Tolbert
- Jon Tomberlin
- Steve Toomey
- Greta Tosi-Miller
- Heather Townsend-Macan
- Mike Trammell
- Todd Trendler
- Travis Truesdell
- Trey Turnage
- Ryan Underwood
- Jon Unroe
- Mike Van Booven
- Chris Van Long
- Doug Van Meter
- Tamara Vineyard
- David Vogler
- Caleb Vuljanic
- Rob Wagner
- Heather Wallace
- Valerie Waskey
- Tom Watson
- Joe Watt
- Jaye Waynick
- Steve Webb
- Travis Webb
- Dave Weber
- Stephanie Weis
- Cameron Weldon
- Jed Welmaker
- Brian West
- Lynn Westergard
- Wally Wetherill
- Thomas Wheeland
- Kelly White
- Scotty White
- Deborah Whitley
- Matt Whitmire
- Aaron Wiegert
- David Wiggins
- Joy Wiggins
- Corey Wilhelm
- Jonathan Wilke
- Mark Wilkerson
- Jason Wilkinson
- Andy Williams
- Carley Williams
- Leslie Wilson
- Tim Wilson
- Tricia Wilson
- Sarah Windham
- Lance Windley
- Rick Wittgren
- Jennifer Wold
- Mike Wolfe
- Michael Wolford
- Matt Wood
- Chris Woosley
- Bryan Wright
- Michael Wright
- Lucie Wuescher
- Omar Yassine
- Tim York
- Andy Young
- Courtney Young
- Paul Young
- Tracy Young
- Adam Zieren
- Mike Zimmerman