

## Chapman, Jacqueline

---

**Subject:** FW: Legal Access Consulting (Nationwide) Guaranty by 07-19-17: RFP No. R2114349P1, Group Prepaid Legal Insurance Services

**From:** Robert Heston [mailto:bheston@legalaccessplans.com]  
**Sent:** Wednesday, July 19, 2017 2:07 PM  
**To:** Chapman, Jacqueline  
**Subject:** RE: Legal Access Consulting (Nationwide) Guaranty by 07-19-17: RFP No. R2114349P1, Group Prepaid Legal Insurance Services

AS we indicated yesterday, Legal Access Consulting LLC d/b/a wishes to withdraw its proposal without being evaluated by the Evaluation Committee. Thank you.

**Robert L. Heston, Jr.**  
President and Chief Executive Officer  
Legal Access Plans, L.L.C.  
The LegalEASE Group  
713-785-7400 ex. 3001



### CONFIDENTIALITY NOTICE

The information in this email may be confidential and/or privileged. This email is intended to be reviewed by only the individual or organization named above. If you are not the intended recipient or an authorized representative of the intended recipient, you are notified that any review, dissemination or copying of this email and its attachments, if any, or the information contained herein is prohibited, and by any inadvertent or unauthorized review the sender does not intend to waive any such confidentiality and/or privilege. If you have received this email in error, please immediately notify the sender by return email and delete this email from your system. Thank you.

**From:** Chapman, Jacqueline [mailto:JCHAPMAN@broward.org]  
**Sent:** Wednesday, July 19, 2017 10:58 AM  
**To:** Robert Heston <bheston@legalaccessplans.com>  
**Cc:** tracy\_lalasz@legalaccessplans.com; Crock, Erma E <erma.crock@nationwide.com>; Perez-Garviso, Martha <MPEREZGARVISO@broward.org>; Chapman, Jacqueline <JCHAPMAN@broward.org>  
**Subject:** RE: Legal Access Consulting (Nationwide) Guaranty by 07-19-17: RFP No. R2114349P1, Group Prepaid Legal Insurance Services  
**Importance:** High

Good Day Mr. Heston,

The proposal from Legal Access Consulting LLC, d/b/a LegalEASE contained financial information from another entity (Nationwide). Therefore, the County requested a guaranty letter from Nationwide to explain the relationship between the two entities and a financial guaranty for Legal Access Consulting by Nationwide. The letter received from Nationwide (attached) did not address the financial guaranty. A revised Financial Guaranty Letter was requested to further ascertain the relationships and financial obligations of the respondent and the firm(s) presented in response to Broward County Request for Proposal (RFP) No. R2114349P1, Group Prepaid Legal Insurance Services.

If Legal Access Consulting LLC, d/b/a LegalEASE (respondent) is unable to provide a Financial Guaranty Letter from its parent/affiliate(s) that describes the relationship(s) between the entities, and guarantees all financial obligations of the respondent in the event the respondent can no longer fulfill its duties, the Purchasing Division can still proceed with presenting your proposal to the Evaluation Committee for determination of responsibility.

**The Financial Guaranty Letter is not a requirement but a request by the Finance and Administrative Services Department to further clarify the relationships and financial obligations of the respondents and its affiliate(s).**

Please confirm by **5:00 PM, Wednesday July 19, 2017** if you can provide your own financial statements for the last two years to eliminate the requirement of a Financial Guaranty Letter, (or) provide a Financial Guaranty Letter from your Parent/Affiliate stating the relationships and financial responsibility of the firm(s), (or) the Purchasing Division can proceed with presenting your proposal to the Evaluation Committee for a determination of responsibility.

In the alternative, please advise if Legal Access Consulting LLC, d/b/a LegalEASE, wishes to withdraw its proposal without being evaluated by the Evaluation Committee.



*Jacqueline A. Chapman*, Purchasing Agent

General Services Section - Broward County Purchasing Division

115 S. Andrews Avenue, Fort Lauderdale, FL 33301

Office: 954-357-7996 Fax: 954-357-6996 Website: [www.broward.org](http://www.broward.org)

*Customer Care is my priority. How am I doing? Please contact my Manager, Martha Perez-Garviso, at [mperezgarviso@broward.org](mailto:mperezgarviso@broward.org) with feedback.*

**From:** Robert Heston [<mailto:bheston@legalaccessplans.com>]

**Sent:** Tuesday, July 18, 2017 5:36 PM

**To:** Chapman, Jacqueline <[JCHAPMAN@broward.org](mailto:JCHAPMAN@broward.org)>

**Cc:** [tracy\\_lalasz@legalaccessplans.com](mailto:tracy_lalasz@legalaccessplans.com); Crock, Erma E <[erma.crock@nationwide.com](mailto:erma.crock@nationwide.com)>

**Subject:** RE: Legal Access Consulting (Nationwide) Guaranty by 07-19-17: RFP No. R2114349P1, Group Prepaid Legal Insurance Services

Ms. Chapman:

I am still puzzled by what is needed. We have never been asked for such a guaranty by any entity in 34 years of my heading up this operation, given that the underwriter, Nationwide Insurance essentially stands behind the program by having filed the legal plan we presented in the State of Florida. However, since you indicated that it is a necessity for you to have something more than Nationwide signed in their recent letter we sent to you, we respectfully will have to withdraw our RFP Response for the County of Broward employees.

Thank you for your time and consideration of our company.

**Robert L. Heston, Jr.**

President and Chief Executive Officer

Legal Access Plans, L.L.C.

The LegalEASE Group

713-785-7400 ex. 3001



CONFIDENTIALITY NOTICE

The information in this email may be confidential and/or privileged. This email is intended to be reviewed by only the individual or organization named above. If you are not the intended recipient or an authorized representative of the intended recipient, you are notified that any review, dissemination or copying of this email and its attachments, if any, or the information contained herein is prohibited, and by any inadvertent or unauthorized review the sender does not intend to waive any such confidentiality and/or privilege. If you have received this email in error, please immediately notify the sender by return email and delete this email from your system. Thank you.

---

**From:** Chapman, Jacqueline [mailto:JCHAPMAN@broward.org]  
**Sent:** Tuesday, July 18, 2017 1:56 PM  
**To:** Robert Heston <bheston@legalaccessplans.com>  
**Cc:** Chapman, Jacqueline <JCHAPMAN@broward.org>  
**Subject:** Legal Access Consulting (Nationwide) Guaranty by 07-19-17: RFP No. R2114349P1, Group Prepaid Legal Insurance Services

Good Day Mr. Heston,  
After our Preparation Meeting this morning, the Finance Division and I conferenced and left a message this morning.  
Thank you for returning our call.

As stated earlier, the attached letter from Nationwide did not adequately provide financial guarantee.  
See email below.

I have obtained two sample copies of acceptable Financial Guaranty Letters from our Finance Division for your preview.

Time is of the essence. A response is requested by 5:00 PM, Wednesday July 19, 2017.



*Jacqueline A. Chapman*, Purchasing Agent

General Services Section - Broward County Purchasing Division

115 S. Andrews Avenue, Fort Lauderdale, FL 33301

Office: 954-357-7996 Fax: 954-357-6996 Website: [www.broward.org](http://www.broward.org)

Customer Care is my priority. How am I doing? Please contact my Manager, Martha Perez-Garviso, at [mperezgarviso@broward.org](mailto:mperezgarviso@broward.org) with feedback.

---

**From:** Owens, Anna  
**Sent:** Tuesday, July 18, 2017 12:28 PM  
**To:** Chapman, Jacqueline <JCHAPMAN@broward.org>  
**Cc:** Fortenberry, Lori <LFORTENBERRY@broward.org>  
**Subject:** RE: Guaranty by 07-13-17: RFP No. R2114349P1, Group Prepaid Legal Insurance Services

In a situation where a respondent doesn't provide its own financial statements (as specified by the RFP) but those of the parent/affiliate company, the County asks for a financial guarantee letter. The letter, from the parent/affiliate, will describe the relationship between the entities, and guarantee all financial obligations of the respondent in the event the respondent can no longer fulfill its duties. If such letter cannot be obtained, the respondent needs to provide own complete financial statements for the last two years.

Thanks,

Anna



**Anna M. Owens, CTP**

Investment & Finance Coordinator  
Finance and Administrative Services Department  
115 S. Andrews Ave, Room A-430, Ft. Lauderdale, FL 33301  
954-357-7133  
[anowens@broward.org](mailto:anowens@broward.org) • [www.broward.org/finance](http://www.broward.org/finance)

---

**From:** Chapman, Jacqueline [<mailto:JCHAPMAN@broward.org>]  
**Sent:** Tuesday, July 11, 2017 3:16 PM  
**To:** Chapman, Jacqueline  
**Subject:** Docs by 07-13-17: RFP No. R2114349P1, Group Prepaid Legal Insurance Services  
**Importance:** High

Good Day,

Additional information is required as we continue our review of your submittal for Request for Proposal (RFP) No. **R2114349P1, Group Prepaid Legal Insurance Services.**

1. **Follow up** on request for Letter of Financial Guaranty (sample attached)
2. Evidence that your firm is authorized to transact business in Florida with the Department of State by providing a copy of your Certificate of Status (sample attached):  
<https://services.sunbiz.org/Filings/CertificateOfStatus/StandaloneCertificateStart>
3. Provide Geographical Access per the template in the bid documents (See attached)

If you have already provided this information please notify us so we can add it to your files.

In order to be evaluated for responsiveness and responsibility to the requirements of the solicitation, a copy of this information is requested as soon as possible but no later than 5:00 PM, Thursday July 13, 2017.



*Jacqueline A. Chapman*, Purchasing Agent

General Services Section - Broward County Purchasing Division  
115 S. Andrews Avenue, Fort Lauderdale, FL 33301

Office: 954-357-7996 Fax: 954-357-6996 Website: [www.broward.org](http://www.broward.org)

Customer Care is my priority. How am I doing? Please contact my Manager, Martha Perez-Garviso, at [mperezgarviso@broward.org](mailto:mperezgarviso@broward.org) with feedback.

---

Under Florida law, most e-mail messages to or from Broward County employees or officials are public records, available to any person upon request, absent an exemption. Therefore, any e-mail message to or from the County, inclusive of e-mail addresses contained therein, may be subject to public disclosure.

The information contained in this message may be CONFIDENTIAL and is for the intended addressee only. Any unauthorized use, dissemination of the information, or copying of this message is prohibited. If you are not the intended addressee, please notify the sender immediately and delete this message.

---

Under Florida law, most e-mail messages to or from Broward County employees or officials are public records, available to any person upon request, absent an exemption. Therefore, any e-mail message to or from the County, inclusive of e-mail addresses contained therein, may be subject to public disclosure.

---

Under Florida law, most e-mail messages to or from Broward County employees or officials are public records, available to any person upon request, absent an exemption. Therefore, any e-mail message to or from the County, inclusive of e-mail addresses contained therein, may be subject to public disclosure.