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# **APPLICATION FOR EXEMPTION FROM AUDIT**

SHORT FORM

NAME OF GOVERNMENT	Park Union Metropolitan District No. 2	For the Year Ended
ADDRESS	121 South Tejon Street	12/31/22
	Suite 1100	or fiscal year ended:
	Colorado Springs, CO 80903	
CONTACT PERSON	Carrie Bartow	
PHONE	719-635-0330	
EMAIL	Carrie.Bartow@claconnect.com	

 PART 1 - CERTIFICATION OF PREPARER

 I certify that I am skilled in governmental accounting and that the information in the application is complete and accurate, to the best of my knowledge.

 NAME:
 Carrie Bartow

NAME:	Carrie Bartow
TITLE	Accountant for the District
FIRM NAME (if applicable)	CliftonLarsonAllen LLP
ADDRESS	121 South Tejon Street, Suite 1100, Colorado Springs, CO 80903
PHONE	719-635-0330
DATE PREPARED	1-Feb-23

# PREPARER (SIGNATURE REQUIRED)

## SEE ATTACHED ACCOUNTANT'S COMPILATION REPORT

Please indicate whether the following financial information is recorded	GOVERNMENTAL (MODIFIED ACCRUAL BASIS)	<b>PROPRIETARY</b> (CASH OR BUDGETARY BASIS)
using Governmental or Proprietary fund types	7	

# **PART 2 - REVENUE**

REVENUE: All revenues for all funds must be reflected in this section, including proceeds from the sale of the government's land, building, and equipment, and proceeds from debt or lease transactions. Financial information will not include fund equity information.

Line#	De	escription	Round to nearest Dollar	Please use this
2-1	Taxes: Property	(report mills levied in Question 10-6)	\$-	space to provide
2-2	Specific owner	ship	\$ -	any necessary
2-3	Sales and use		\$ -	explanations
2-4	Other (specify)	:	\$ -	
2-5	Licenses and permits		\$ -	
2-6	Intergovernmental:	Grants	\$ -	1
2-7		Conservation Trust Funds (Lottery)	\$ -	1
2-8		Highway Users Tax Funds (HUTF)	\$ -	1
2-9		Other (specify):	\$ -	1
2-10	Charges for services		\$ -	1
2-11	Fines and forfeits		\$-	]
2-12	Special assessments		\$-	]
2-13	Investment income		\$ -	]
2-14	Charges for utility services		\$ -	
2-15	Debt proceeds	(should agree with line 4-4, column 2)	\$-	]
2-16	Lease proceeds		\$ -	]
2-17	Developer Advances received	(should agree with line 4-4)	\$ -	
2-18	Proceeds from sale of capital asset	S	\$ -	
2-19	Fire and police pension		\$-	
2-20	Donations		\$-	
2-21	Other (specify):		\$-	
2-22			\$-	]
2-23			\$-	
2-24	(add lir	nes 2-1 through 2-23) TOTAL REVENUE	\$ -	

## **PART 3 - EXPENDITURES/EXPENSES**

EXPENDITURES: All expenditures for all funds must be reflected in this section, including the purchase of capital assets and principal and interest payments on long-term debt. Financial information will not include fund equity information.

Line#	Description		Round to nearest Dolla	r	Please use this
3-1	Administrative	ĺ	\$	-	space to provide
3-2	Salaries	Ĩ	\$	-	any necessary
3-3	Payroll taxes	ſ	\$	-	explanations
3-4	Contract services	ſ	\$	-	
3-5	Employee benefits	ſ	\$	-	
3-6	Insurance		\$	-	
3-7	Accounting and legal fees	[	\$	-	
3-8	Repair and maintenance		\$	-	
3-9	Supplies	[	\$	-	
3-10	Utilities and telephone	[	\$	-	
3-11	Fire/Police	[	\$	-	
3-12	Streets and highways	[	\$	-	
3-13	Public health	[	\$	-	
3-14	Capital outlay	[	\$	-	
3-15	Utility operations	[	\$	-	
3-16	Culture and recreation	[	\$	-	
3-17	Debt service principal (should a	agree with Part 4)	\$	-	
3-18	Debt service interest	[	\$	-	
3-19	Repayment of Developer Advance Principal (should ag	gree with line 4-4)	\$	-	
3-20	Repayment of Developer Advance Interest	[	\$	-	
3-21	Contribution to pension plan (should	agree to line 7-2)	\$	-	
3-22	Contribution to Fire & Police Pension Assoc. (should	agree to line 7-2)	\$	-	
3-23	Other (specify):				
3-24		[	\$	-	
3-25			\$	-	
3-26	(add lines 3-1 through 3-24) TOTAL EXPENDITURE	S/EXPENSES	\$	-	
TOTAL	. REVENUE (Line 2-24) or TOTAL EXPENDITURES (Line 3-26) are G	REATER than	\$100,000 - <u>STOP</u> . You i	may n	ot use this

form. Please use the "Application for Exemption from Audit - LONG FORM".

	PART 4 - DEBT OUTSTANDING	· · · · · · · · · · · · · · · · · · ·	, AND RE		
4-1	Please answer the following questions by marking the a Does the entity have outstanding debt?	appropriate boxes.		Yes	No I
4-1	If Yes, please attach a copy of the entity's Debt Repayment S	chedule			4
4-2	Is the debt repayment schedule attached? If no. MUST explai				7
	The District has no outstanding debt.				
4-3	Is the entity current in its debt service payments? If no, MUS	Fexplain:			4
	The District has no outstanding debt.				
4-4	Please complete the following debt schedule, if applicable:				
	(please only include principal amounts)(enter all amount as positive	Outstanding at	Issued during	Retired during	Outstanding at
	numbers)	end of prior year*	year	year	year-end
	General obligation bonds	\$-	\$-	\$-	\$-
	Revenue bonds	\$-	\$-	\$-	\$ -
	Notes/Loans	\$ -	\$-	\$-	\$ -
	Lease Liabilities	\$ -	\$-	\$-	\$-
	Developer Advances	\$ -	\$-	\$-	\$-
	Other (specify):	\$ -	\$-	\$-	\$-
	TOTAL	\$ -	\$-	\$-	\$-
		*must tie to prior ye	Ŧ	Ψ	Ψ
	Please answer the following questions by marking the appropriate boxes			Yes	No
4-5	Does the entity have any authorized, but unissued, debt?	-		<b>I</b>	
If yes:	How much?	\$ 5,7	20,000,000.00		
	Date the debt was authorized:	11/7/2	2017		
4-6	Does the entity intend to issue debt within the next calendar	year?			~
If yes:	How much?	\$	-		
4-7	Does the entity have debt that has been refinanced that it is s	till responsible	for?		7
If yes:	What is the amount outstanding?	\$	-		
4-8	Does the entity have any lease agreements?	Ť			~
If yes:	What is being leased?				
2	What is the original date of the lease?				
	Number of years of lease?				_
	Is the lease subject to annual appropriation?				7
	What are the annual lease payments?	\$	-		
	Please use this space to provide any	explanations or	comments:		

	PART 5 - CASH AND INVESTM	ENTS				
	Please provide the entity's cash deposit and investment balances.		Am	ount	To	tal
5-1	YEAR-END Total of ALL Checking and Savings Accounts		\$	-		
5-2	Certificates of deposit		\$	-		
	Total Cash Deposits				\$	-
	Investments (if investment is a mutual fund, please list underlying investments):					
			\$	-	]	
5-3			\$	-	]	
5-5			\$	-	]	
			\$	-		
	Total Investments				\$	-
	Total Cash and Investments				\$	-
	Please answer the following questions by marking in the appropriate boxes	Yes		No	N/	Ά
5-4	Are the entity's Investments legal in accordance with Section 24-75-601, et. seq., C.R.S.?				7	
5-5	Are the entity's deposits in an eligible (Public Deposit Protection Act) public depository (Section 11-10.5-101, et seq. C.R.S.)?				7	
lf no, M	UST use this space to provide any explanations:					

The District had no cash deposits.

	PART 6 - CAPITAL AND RIGHT-TO-USE ASSETS					
	Please answer the following questions by marking in the appropriate box	es.		Yes	No	
6-1	Does the entity have capital assets?				<b>_</b>	
6-2	6-1       Does the entity have capital assets?       □       ☑         6-2       Has the entity performed an annual inventory of capital assets in accordance with Section 29-1-506, C.R.S.,? If no, MUST explain:       □       ☑         N/A - The District has no capital assets.       □       ☑       ☑         6-3       Complete the following capital & right-to-use assets table:       □       Balance - beginning of the be included in Part 3)       Deletions       Year-End Balance         Land       \$       -       \$       -       \$       -       \$       -         Buildings       Machinery and equipment       \$       -       \$       -       \$       -       \$       -         Furniture and fixtures       Infrastructure       \$       -       \$ <td< td=""><td>Z</td></td<>		Z			
	N/A - The District has no capital assets.	no capital assets.				
6-3	Complete the following capital & right-to-use assets table:	beginning of the	be included in	Deletions		
	Land	\$-	\$-	\$-	\$-	
	Buildings	\$-	\$-	\$-	\$ -	
	Machinery and equipment	\$-	\$-	\$-	\$ -	
	Furniture and fixtures	\$-	\$-	\$-	\$ -	
	Infrastructure	\$-	\$-	\$ -	\$ -	
	Construction In Progress (CIP)	\$-	\$-	\$-	\$ -	
	Leased Right-to-Use Assets	\$-	\$-	\$-	\$ -	
	Other (explain):	\$-	\$-	\$-	\$ -	
	Accumulated Depreciation/Amortization (Please enter a negative, or credit, balance)	\$ -	\$ -	\$ -	\$ -	
	TOTAL	\$-	\$-	\$-	\$-	

Please use this space to provide any explanations or comments:

	Please answer the following questions by marking in the appropriate boxes.		Yes	No
7-1	Does the entity have an "old hire" firefighters' pension plan?			7
7-2	Does the entity have a volunteer firefighters' pension plan?			4
If yes:	Who administers the plan?			
	Indicate the contributions from:			
	Tax (property, SO, sales, etc.):	\$ -		
	State contribution amount:	\$ -		
	Other (gifts, donations, etc.):	\$ -		
	TOTAL	\$ -		
	What is the monthly benefit paid for 20 years of service per retiree as of Jan 1?	\$ -		

	PART 8 - BUDGET INFORMATION					
	Please answer the following questions by marking in the appropriate boxes.	Yes	No	N/A		
8-1	Did the entity file a budget with the Department of Local Affairs for the current year in accordance with Section 29-1-113 C.R.S.?					
8-2	Did the entity pass an appropriations resolution, in accordance with Section 29-1-108 C.R.S.? If no, MUST explain:					

If yes: Please indicate the amount budgeted for each fund for the year reported:

Governmental/Proprietary Fund Name	Total Appropriations By Fund
General Fund	\$ -

	PART 9 - TAXPAYER'S BILL OF RIGHTS (TAB	OR)	
	Please answer the following question by marking in the appropriate box	Yes	No
9-1	Is the entity in compliance with all the provisions of TABOR [State Constitution, Article X, Section 20(5)]? Note: An election to exempt the government from the spending limitations of TABOR does not exempt the government from the 3 percent emergency reserve requirement. All governments should determine if they meet this requirement of TABOR.	<b>v</b>	
lf no, Ml	JST explain:		
	PART 10 - GENERAL INFORMATION		
	Please answer the following questions by marking in the appropriate boxes.	Yes	No
10-1	Is this application for a newly formed governmental entity?		7
lf yes: <b>10-2</b>	Date of formation: Has the entity changed its name in the past or current year?		
10-2	has the entity changed its name in the past of current year :	7	
If yes:	Please list the NEW name & PRIOR name:		
	Park Union Metropolitan District No. 2 / SW Downtown Metropolitan District No. 2		
10-3	Is the entity a metropolitan district?	7	
	Please indicate what services the entity provides:		
	See below.		
10-4	Does the entity have an agreement with another government to provide services?	$\checkmark$	
If yes:	List the name of the other governmental entity and the services provided:		
	See below.	_	_
10-5	Has the district filed a Title 32, Article 1 Special District Notice of Inactive Status during		~
If yes:	Date Filed:		
10-6	Does the entity have a certified Mill Levy?	$\checkmark$	
If yes:	Please provide the following <u>mills</u> levied for the year reported (do not report \$ amounts):		
	Bond Redemption mills		-
	General/Other mills		-
	Total mills		

Please use this space to provide any explanations or comments:

10-3: Public improvements for water, sanitation, streets, traffic and safety, parks and recreation, transportation, television relay and translation, mosquito control, security, and fire protection/medical emergency service.

10-4: Park Union Metropolitan District No. 2 was formed in conjunction with Park Union Metropolitan District No. 1 and Park Union Business Improvement District to provide for the above improvements. Operational and maintenance costs will be cooperatively funded by the Districts to include accounting, legal, management and other consultant or administrative costs pursuant to the Intergovernmental Agreement for the Operational Cost Sharing. The District must enter into a separate IGA with the City of Colorado Springs to operate and maintain any of the above improvements except for: park and recreation amenities, sidewalk and public space maintenance, and streetscaping.

PART 11 - GOVERNING BODY APPROVAL		
Please answer the following question by marking in the appropriate box	YES	NO

12-1 If you plan to submit this form electronically, have you read the new Electronic Signature Policy?

7

# Office of the State Auditor — Local Government Division - Exemption Form Electronic Signatures Policy and Procedure

## **Policy - Requirements**

The Office of the State Auditor Local Government Audit Division may accept an electronic submission of an application for exemption from audit that includes governing board signatures obtained through a program such as Docusign or Echosign. Required elements and safeguards are as follows:

• The preparer of the application is responsible for obtaining board signatures that comply with the requirement in Section 29-1-604 (3), C.R.S., that states the application shall be personally reviewed, approved, and signed by a majority of the members of the governing body.

• The application must be accompanied by the signature history document created by the electronic signature software. The signature history document must show when the document was created and when the document was emailed to the various parties, and include the dates the individual board members signed the document. The signature history must also show the individuals' email addresses and IP address.

• Office of the State Auditor staff will not coordinate obtaining signatures.

The application for exemption from audit form created by our office includes a section for governing body approval. Local governing boards note their approval and submit the application through one of the following three methods:

1) Submit the application in hard copy via the US Mail including original signatures.

2) Submit the application electronically via email and either,

a. Include a copy of an adopted resolution that documents formal approval by the Board, or

b. Include electronic signatures obtained through a software program such as Docusign or Echosign in accordance with the requirements noted above.

	Print the names of ALL members of current governing body below.	A <u>MAJORITY</u> of the members of the governing body must complete and sign in the column below.
Board Member 1	Print Board Member's Name Jeffrey A. Finn	I Jeffrey A. Finn, attest I am a duly elected or appointed board member, and that I have personally reviewed and approve this application for exemption from audit. Signed
Board Member 2	Print Board Member's Name Christopher S. Jenkins	I Christopher S. Jenkins, attest I am a duly elected or appointed board member, and that I have personally reviewed and approve this application for exemption from audit. Signed
	Print Board Member's Name	Date: My term Expires: May 2023 I David D. Jenkins, attest I am a duly elected or appointed board member, and that I have personally reviewed and approve this application for exemption from audit.
Board Member 3	David D. Jenkins	Signed <u>Development by:</u> Date: <u>3/28/2023</u> My term Expires: May 2023
Board	Print Board Member's Name	I Delroy L. Johnson, attest I am a duly elected or appointed board member, and that I have personally reviewed and approve this application for exemption from audit.
Member 4	Delroy L. Johnson	Signed <u>Dury Museu</u> Date: <u>3/29/2023</u> My term Expires: May 2023
Board Member 5	Print Board Member's Name	I, attest I am a duly elected or appointed board member, and that I have personally reviewed and approve this application for exemption from audit. Signed Date: My term Expires:
Board Member 6	Print Board Member's Name	I, attest I am a duly elected or appointed board member, and that I have personally reviewed and approve this application for exemption from audit. Signed Date: My term Expires:
Board Member 7	Print Board Member's Name	I, attest I am a duly elected or appointed board member, and that I have personally reviewed and approve this application for exemption from audit. Signed Date: My term Expires:



CliftonLarsonAllen LLP 8390 East Crescent Pkwy., Suite 300 Greenwood Village, CO 80111

phone 303-779-5710 fax 303-779-0348 **CLAconnect.com** 

### Accountant's Compilation Report

Board of Directors Park Union Metropolitan District No. 2 El Paso County, Colorado

Management is responsible for the accompanying Application for Exemption from Audit of Park Union Metropolitan District No. 2 as of and for the year ended December 31, 2022, included in the accompanying prescribed form. We have performed a compilation engagement in accordance with Statements on Standards for Accounting and Review Services promulgated by the Accounting and Review Services Committee of the American Institute of Certified Public Accountants. We did not audit or review the financial statements included in the accompanying prescribed form nor were we required to perform any procedures to verify the accuracy or completeness of the information provided by management. Accordingly, we do not express an opinion, a conclusion, nor provide any form of assurance on the financial statements included in the accompanying prescribed form.

The Application for Exemption from Audit is presented in accordance with the requirements of the Colorado Office of the State Auditor, which differ from accounting principles generally accepted in the United States of America.

This report is intended solely for the information and use of the Colorado Office of the State Auditor and is not intended to be and should not be used by anyone other than this specified party.

We are not independent with respect to Park Union Metropolitan District No. 2.

Clifton Larson allen LLP

Colorado Springs, Colorado February 1, 2023

## DocuSign

#### **Certificate Of Completion**

Envelope Id: 1910F094FCC94F4CB7BD7C9E927A3B6A Subject: Complete with DocuSign: Park Union MD No. 2 - 2022 Audit Exemption.pdf Client Name: Park Union Metropolitan District No. 2 Client Number: A194838 Source Envelope: Document Pages: 8 Certificate Pages: 5 AutoNav: Enabled EnvelopeId Stamping: Enabled Time Zone: (UTC-06:00) Central Time (US & Canada)

#### **Record Tracking**

Status: Original 3/28/2023 3:58:56 PM

#### Signer Events

David Jenkins djenkins@norwood.dev Asst Sec.

Security Level: Email, Account Authentication (None)

Electronic Record and Signature Disclosure: Accepted: 3/28/2023 4:16:59 PM

ID: dff539f0-63ac-4ed5-86d4-8ad83bab64b5

Delroy Johnson djohnson@norwood.dev

Director

Various Districts

Security Level: Email, Account Authentication (None)

#### Electronic Record and Signature Disclosure:

Accepted: 3/29/2023 8:11:47 AM ID: 4de59d2c-96e0-4a2b-9676-653c273b9745

Jeffrey Finn

jfinn@norwood.dev

Secratery

Security Level: Email, Account Authentication (None)

Electronic Record and Signature Disclosure: Accepted: 3/28/2023 4:23:16 PM ID: 1b9f94ce-81b6-497a-a7c5-441a69dab204 Holder: Spencer Johnson spencer.johnson@claconnect.com

#### Signature

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Envelope Summary Events	Status	Timestamps
Envelope Sent	Hashed/Encrypted	3/28/2023 4:02:50 PM
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Envelope Updated	Security Checked	3/29/2023 1:10:50 PM
Envelope Updated Certified Delivered	Security Checked Security Checked	3/29/2023 1:10:50 PM 3/28/2023 4:23:17 PM
Envelope Updated Certified Delivered Signing Complete	Security Checked Security Checked Security Checked	3/29/2023 1:10:50 PM 3/28/2023 4:23:17 PM 3/28/2023 4:23:33 PM

## ELECTRONIC RECORD AND SIGNATURE DISCLOSURE

From time to time, CliftonLarsonAllen LLP (we, us or Company) may be required by law to provide to you certain written notices or disclosures. Described below are the terms and conditions for providing to you such notices and disclosures electronically through the DocuSign system. Please read the information below carefully and thoroughly, and if you can access this information electronically to your satisfaction and agree to this Electronic Record and Signature Disclosure (ERSD), please confirm your agreement by selecting the check-box next to 'I agree to use electronic records and signatures' before clicking 'CONTINUE' within the DocuSign system.

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At any time, you may request from us a paper copy of any record provided or made available electronically to you by us. You will have the ability to download and print documents we send to you through the DocuSign system during and immediately after the signing session and, if you elect to create a DocuSign account, you may access the documents for a limited period of time (usually 30 days) after such documents are first sent to you. After such time, if you wish for us to send you paper copies of any such documents from our office to you, you will be charged a \$0.00 per-page fee. You may request delivery of such paper copies from us by following the procedure described below.

## Withdrawing your consent

If you decide to receive notices and disclosures from us electronically, you may at any time change your mind and tell us that thereafter you want to receive required notices and disclosures only in paper format. How you must inform us of your decision to receive future notices and disclosure in paper format and withdraw your consent to receive notices and disclosures electronically is described below.

## Consequences of changing your mind

If you elect to receive required notices and disclosures only in paper format, it will slow the speed at which we can complete certain steps in transactions with you and delivering services to you because we will need first to send the required notices or disclosures to you in paper format, and then wait until we receive back from you your acknowledgment of your receipt of such paper notices or disclosures. Further, you will no longer be able to use the DocuSign system to receive required notices and consents electronically from us or to sign electronically documents from us.

## All notices and disclosures will be sent to you electronically

Unless you tell us otherwise in accordance with the procedures described herein, we will provide electronically to you through the DocuSign system all required notices, disclosures, authorizations, acknowledgements, and other documents that are required to be provided or made available to you during the course of our relationship with you. To reduce the chance of you inadvertently not receiving any notice or disclosure, we prefer to provide all of the required notices and disclosures to you by the same method and to the same address that you have given us. Thus, you can receive all the disclosures and notices electronically or in paper format through the paper mail delivery system. If you do not agree with this process, please let us know as described below. Please also see the paragraph immediately above that describes the consequences of your electing not to receive delivery of the notices and disclosures electronically from us.

## How to contact CliftonLarsonAllen LLP:

You may contact us to let us know of your changes as to how we may contact you electronically, to request paper copies of certain information from us, and to withdraw your prior consent to receive notices and disclosures electronically as follows:

To contact us by email send messages to: BusinessTechnology@CLAconnect.com

## To advise CliftonLarsonAllen LLP of your new email address

To let us know of a change in your email address where we should send notices and disclosures electronically to you, you must send an email message to us at BusinessTechnology@CLAconnect.com and in the body of such request you must state: your

at Business Technology@CLAconnect.com and in the body of such request you must state: your previous email address, your new email address. We do not require any other information from you to change your email address.

If you created a DocuSign account, you may update it with your new email address through your account preferences.

## To request paper copies from CliftonLarsonAllen LLP

To request delivery from us of paper copies of the notices and disclosures previously provided by us to you electronically, you must send us an email

to BusinessTechnology@CLAconnect.com and in the body of such request you must state your email address, full name, mailing address, and telephone number. We will bill you for any fees at that time, if any.

## To withdraw your consent with CliftonLarsonAllen LLP

To inform us that you no longer wish to receive future notices and disclosures in electronic format you may:

i. decline to sign a document from within your signing session, and on the subsequent page, select the check-box indicating you wish to withdraw your consent, or you may;

ii. send us an email to BusinessTechnology@CLAconnect.com and in the body of such request you must state your email, full name, mailing address, and telephone number. We do not need any other information from you to withdraw consent. The consequences of your withdrawing consent for online documents will be that transactions may take a longer time to process.

## **Required hardware and software**

The minimum system requirements for using the DocuSign system may change over time. The current system requirements are found here: <u>https://support.docusign.com/guides/signer-guide-signing-system-requirements</u>.

### Acknowledging your access and consent to receive and sign documents electronically

To confirm to us that you can access this information electronically, which will be similar to other electronic notices and disclosures that we will provide to you, please confirm that you have read this ERSD, and (i) that you are able to print on paper or electronically save this ERSD for your future reference and access; or (ii) that you are able to email this ERSD to an email address where you will be able to print on paper or save it for your future reference and access. Further, if you consent to receiving notices and disclosures exclusively in electronic format as described herein, then select the check-box next to 'I agree to use electronic records and signatures' before clicking 'CONTINUE' within the DocuSign system.

By selecting the check-box next to 'I agree to use electronic records and signatures', you confirm that:

- You can access and read this Electronic Record and Signature Disclosure; and
- You can print on paper this Electronic Record and Signature Disclosure, or save or send this Electronic Record and Disclosure to a location where you can print it, for future reference and access; and
- Until or unless you notify CliftonLarsonAllen LLP as described above, you consent to receive exclusively through electronic means all notices, disclosures, authorizations, acknowledgements, and other documents that are required to be provided or made available to you by CliftonLarsonAllen LLP during the course of your relationship with CliftonLarsonAllen LLP.