



## APPLICATION FOR ASSISTANCE

Each applicant seeking assistance must complete this application and provide required supplemental form/documentation. A **non-refundable** application fee of \$350.00 must be included with this application. Make check payable to COMIDA. Please see page 10 for additional information on costs and fees.

Please answer all questions. Use "None" or "Not Applicable" where necessary. Information in this application may be subject to public review under New York State Law, except for information that is considered deniable by the Freedom of Information Law. This form is available at [www.growmonroe.org](http://www.growmonroe.org).

### I. APPLICANT

A. Name 800 Parker Hill Drive LLC  
 Address 1020 Lehigh Station Road  
 City/State/Zip Henrietta, NY 14467  
 Tax ID No. To be determined  
 Contact Name Eric Jones  
 Title Property Manager  
 Telephone (585) 334-1122  
 E-Mail ejones@lefrois.com

B. Owners of 20% or more of Applicant Company

Name	%	Corporate Title
<u>LeFrois Associates, L</u>	<u>50%</u>	<u>Member</u>
<u>777 Panorama Prop</u>	<u>50%</u>	<u>Member</u>
<u>See Attached Breakd</u>		

C. Applicant's Legal Counsel

Name Mitchell Nusbaum  
 Firm Woods Oviatt Gilman LP  
 Address 1900 Bausch & Lomb Place  
 City/State/Zip Rochester, NY 14604  
 Telephone (585) 987-2874  
 Fax (585) 987-2974  
 Email mnusbaum@woodsoviatt.com

### II. PROJECT

A. Address of proposed project facility  
Proposed Address: 800 Parker Hill Drive,  
Rochester, NYU 14625  
 Tax Map Parcel Number 164200 138.12-1-1.1 (part)  
 City/Town/Village Town of Penfield  
 School District Penfield  
 Current Legal Owner of Property  
777 Panorama Properties LLC

B. Proposed User(s)/Tenant(s) of the Facility  
 If there are multiple Users/Tenants, please attach additional pages.  
 Company Name See Attached for Tenant Info  
 Address \_\_\_\_\_  
 City/State/Zip \_\_\_\_\_  
 Tax ID No. \_\_\_\_\_  
 Contact Name \_\_\_\_\_  
 Title \_\_\_\_\_  
 Telephone \_\_\_\_\_  
 E-Mail \_\_\_\_\_  
 % of facility to be occupied by company \_\_\_\_\_

C. Owners of 20% or more of User/Tenant Company

Name	%	Corporate Title
_____	_____	_____
_____	_____	_____
_____	_____	_____

- D. Benefits Requested (Check all that apply)
- Sales Tax Exemption
  - Industrial Revenue Bond Financing
  - Mortgage Recording Tax Exemption
  - Real Property Tax Abatement

**Imagine Monroe**

Application for Assistance

**I. APPLICANT: 800 Parker Hill Drive LLC**

**B. Ownership Breakdown**

CONFIDENTIAL

LeFrois Associates, L.P.	50%	777 Panorama Properties LLC	50%
Richard LeFrois	99.47%	JSSP, LLC	84%
Phyllis LeFrois	0.18%	Douglas J. Summers	8%
John LeFrois	0.18%	Lynn Peckham	5%
Maiya Greenfield	0.18%	Thomas Wolfe	3%
	100.00%		

JSSP, LLC members	
John Summers Revivable Trust	50%
Sandra Parker	50%

**II. PROJECT**

**B. Proposed Tenants of the Facility**

Company Name	<u>Dolomite Products Co., Inc.</u>
Address	<u>1150 Penfield Road</u>
City/State/Zip	<u>Rochester, NY 14625</u>
Tax ID No.	<u>16-0410930</u>
Contact	<u>Heidi Freeman</u>
Title	<u>Metropolitan CFO</u>
Telephone	<u>585-755-0241</u>
E-Mail	<u>heidi.freeman@na.crh.com</u>
% of Facility	<u>42%</u>

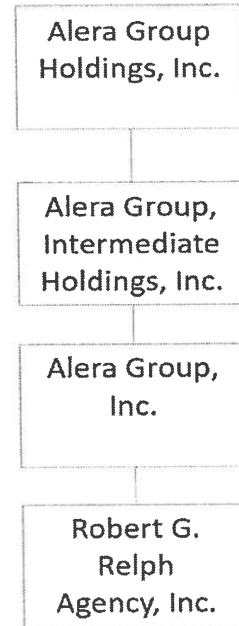
Company Name	<u>Relph Benefit Advisors</u>
Address	<u>400 Willowbrook Office Park, Suite 400</u>
City/State/Zip	<u>Fairport, NY 14450</u>
Tax ID No.	<u>16-1181862</u>
Contact	<u>Shelby L. McPherson</u>
Title	<u>EVP, Operations</u>
Telephone	<u>585-248-8720</u>
E-Mail	<u>smcpherson@relphbenefitadvisors.com</u>
% of Facility	<u>35%</u>

**C. Owners of 20% or more of the Tenant Company**

	<u>Name</u>	<u>%</u>	<u>Corporate Title</u>
CRH		100	Publicly Traded

**Owners of 20% or more of the Tenant Company**

	<u>Name</u>	<u>%</u>	<u>Corporate Title</u>
			See Below Chart



E. Description of project (check all that apply)

- New Construction
- Existing Facility
  - Acquisition
  - Expansion
  - Renovation/Modernization
- Acquisition of machinery/equipment
- Other (specify) \_\_\_\_\_

GENERAL DESCRIPTION OF THE PROJECT AND BACKGROUND ON USER(S) OF THE FACILITY  
(Attached additional sheets as necessary)

Applicant will be constructing a 40,000 SF office building located on 6.9 acres in the new Panorama Park development in Penfield. We currently have two tenants, Relph Benefit Advisors and Dolomite Products Co., Inc that will occupy a total of 30,800 SF. These tenants will be adding 13 jobs, while retaining 118 positions. This new facility will allow these companies to attract work to the local area that would have been possible in their previous spaces. Please see the attached narratives for these two tenants.

**II. PROJECT (cont'd)**

F. Are other facilities or related companies located within New York State?

Yes  No

Location:

*Dolomite* → Schenectady, Ballston Spa, Herkimer, Oriskany

*Ralph* → Watertown, Downtown Rochester

Will the Project result in the removal of an industrial or manufacturing plant of the Project occupant from one area of the state to another area of the state?

Yes  No

Will the Project result in the abandonment of one or more plants or facilities of the Project occupant located within the state?

Yes  No

If Yes to either question, explain how, notwithstanding the aforementioned closing or activity reduction, the Agency's Financial Assistance is required to prevent the Project from relocating out of the State, or is reasonably necessary to preserve the Project occupant's competitive position in its respective industry\*\*:

Dolomite will be vacating the current office at  
1150 Penfield Road and Ralph Advisors will be  
vacating their offices at Willowbrook Office  
Park and their downtown office to bring  
everyone together under one roof.

G. Please confirm by checking the box, below, if there is likelihood that the Project would not be undertaken but for the Financial Assistance provided by the Agency?

Yes  No

If the Project could be undertaken without Financial Assistance provided by the Agency, then provide a statement in the space provided below indicating why the Project should be undertaken with the Financial Assistance to be provided by the Agency\*\*:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\*\*To be completed with Agency assistance.

H. PROJECT TIMELINE

Proposed Date of Acquisition  
02/01/2020  
Proposed Commencement Date of Construction  
02/01/2020  
Anticipated Completion Date  
12/31/2020

I. Contractor(s)  
Russell P. LeFrois Builder, Inc.

J. State Environmental Quality Review (SEQR) Act Compliance

COMIDA, in granting assistance to the Applicant, is required to comply with the New York State Environmental Quality Review Act (SEQR). This is applicable to projects that require the state or local municipality to issue a discretionary permit, license or other type of Approval for that project.

Does the proposed project require discretionary permit, license or other type of approval by the state or local municipality?

YES – Include a copy of any SEQR documents related to this Project including Environmental Assessment Form, Final Determination, Local Municipality Negative Declaration, etc.  
 NO

**III. PROPERTY TAX ABATEMENT/PAYMENT IN LIEU OF TAX AGREEMENT (PILOT)**

Check One:

**JOBSPLUS**

**Requirements:**

- Company must commit to a 10% increase in full-time equivalent employment, measured on the existing impacted employee base, over a 3 year period. The required number of jobs is 12.

**LEASEPLUS**

**Requirements:**

- University and/or medical related facilities in which a 501(c)3 entity leases from a for-profit entity.
- Company must commit to a 10% increase in full-time equivalent employment, measured on the existing impacted employee base, over a 3 year period. The required number of jobs is \_\_\_\_\_.

**ENHANCED JOBSPLUS**

**Requirements:**

- A minimum \$15 million investment in new plant, machinery and equipment or renovation of existing building(s) **AND**
- A minimum of 100 new jobs from new companies locating in Monroe County, or existing companies expanding operations here.

**GREEN JOBSPLUS**

**Requirements:**

- LEED® Certification – Project must be rated as Certified, Gold, Silver or Platinum by the United States Green Building Council's Leadership in Energy and Environmental Design (LEED®) Green Building Rating System.
- Company must commit to a 10% increase in full-time equivalent employment, measured on the existing impacted employee base, over a 3 year period. The required number of jobs is \_\_\_\_\_.

**SHELTER RENTS**

for student housing or affordable housing projects.

**Local Tax Jurisdiction Sponsored PILOT**

**NO PROPERTY TAX ABATEMENT IS SOUGHT FOR THIS PROJECT**

**IV. APPLICANT PROJECT COSTS**

A. Estimate the costs necessary for the construction, acquisition, rehabilitation, improvement and/or equipping of the project by the APPLICANT.

**Building Construction or Renovation**

- a. MATERIALS a. \$ 450,000
- b. LABOR b. \$ 450,000

**Site Work**

- c. MATERIALS c. \$ 3,450,000
  - d. LABOR d. \$ 3,450,000
  - e. Non-Manufacturing Equipment e. \$ \_\_\_\_\_
  - f. Furniture and Fixtures f. \$ \_\_\_\_\_
  - g. LAND and/or BUILDING Purchase g. \$ \_\_\_\_\_
  - h. Manufacturing Equipment h. \$ \_\_\_\_\_
  - i. Soft Costs (Legal, Architect, Engineering) i. \$ 250,000
  - Other (specify) j. \_\_\_\_\_ j. \$ \_\_\_\_\_
  - k. \_\_\_\_\_ k. \$ \_\_\_\_\_
  - l. \_\_\_\_\_ l. \$ \_\_\_\_\_
  - m. \_\_\_\_\_ m. \$ \_\_\_\_\_
- Total Project Costs \$ 8,050,000**

B. Sources of Funds for Project Costs:

- a. Tax-Exempt Industrial Revenue Bond a. \$ \_\_\_\_\_
- b. Taxable Industrial Revenue Bond b. \$ \_\_\_\_\_
- c. Tax-Exempt Civic Facility Bond c. \$ \_\_\_\_\_
- d. Bank Financing d. \$ 6,300,000
- e. Public Sources e. \$ \_\_\_\_\_

Identify each state and federal grant/credit

- \_\_\_\_\_ \$ \_\_\_\_\_
- \_\_\_\_\_ \$ \_\_\_\_\_
- \_\_\_\_\_ \$ \_\_\_\_\_
- \_\_\_\_\_ \$ \_\_\_\_\_

- f. Equity \$ 1,750,000
- TOTAL SOURCES \$ 8,050,000**

C. Has the applicant made any arrangements for the financing of this project?

- Yes
- No

If so, please specify bank, underwriter, etc.

We are looking a few different lenders at this time.

**IV. COMPLETE FOR EACH USER/TENANT THAT IS SEEKING SALES TAX EXEMPTION USER(S)/TENANT(S) PROJECT COSTS**

Use additional sheets as necessary

Company Name Dolomite Products Co., Inc.

A. Estimate the costs necessary for the construction, acquisition, rehabilitation, improvement and/or equipping of the project by the user(s)/tenant(s) for which a sales tax exemption is requested.

Estimated Costs Eligible for Sales Tax Exemption Benefit

- a. MATERIALS a. \$ \_\_\_\_\_
  - b. LABOR b. \$ \_\_\_\_\_
  - c. Non-Manufacturing Equipment c. \$ \_\_\_\_\_
  - d. Furniture and Fixtures d. \$ 300,000
  - Other (specify) e. IT e. \$ 200,000
  - f. Appliances f. \$ 25,000
  - g. \_\_\_\_\_ g. \$ \_\_\_\_\_
  - h. \_\_\_\_\_ h. \$ \_\_\_\_\_
- Total \$ 525,000**

A non-refundable fee of 1/4% on TOTAL(e) above is due and payable upon issuance of a Sales Tax Letter to User(s)/Tenant(s)

Dolomite Products Co., Inc.

User/Tenant Company

[Signature] Metro CFO 12/16/  
Signature Title Date

For Office Use Only	
Total Assessment Value	<u>\$118,405 (for 6.9 acres)</u>
Land	Building
Applicant 2602-	<u>20-003 A</u>
User/Tenant 2602-	<u>20-004 A</u>
RM	

R

**VI. Value of Incentives**

**Project name:** 800 Parker Hill Drive LLC / Dolomite Products Co., Inc. / Relph Benefit Advisors

**A. IDA PILOT Benefits:**

<b>Current Land Assessment (at 6.9 acres)</b>	118,405	Taxes on Land	4,328
<b>Dollar Value of New Construction &amp; Renovation Costs</b>	7,800,000		
<b>Estimated New Assessed Value of Project Subject to IDA</b>	7,918,405		

<b>County Tax rate/\$1,000</b>	8.42
<b>Local Tax Rate* Tax Rate/\$1,000</b>	2.69
<b>School Tax Rate /\$1,000</b>	25.44
<b>Total Tax Rate</b>	<u>36.55</u>

PILOT Year	% Payment	County PILOT Amount	Local PILOT Amount	School PILOT Amount	Total PILOT Amount	Full Tax Payment w/o PILOT	Net Exemption
1	90%	7,565	2,098	22,855	32,518	293,745	256,900
2	80%	14,132	4,196	42,699	61,027	293,745	228,391
3	70%	20,700	6,295	62,542	89,536	293,745	199,882
4	60%	27,267	8,393	82,385	118,045	293,745	171,373
5	50%	33,835	10,491	102,228	146,554	293,745	142,864
6	40%	40,403	12,589	122,071	175,063	293,745	114,355
7	30%	46,970	14,687	141,915	203,572	293,745	85,846
8	20%	53,538	16,786	161,758	232,081	293,745	57,337
9	10%	60,105	18,884	181,601	260,590	293,745	28,828
10	0%	66,673	20,982	201,444	289,099	293,745	319
<b>Total</b>		<u>371,188</u>	<u>115,401</u>	<u>1,121,498</u>	<u>1,608,087</u>	<u>2,937,454</u>	<u>1,286,090</u>

\* Local Tax Rate for Town/City/Village

**B. Sales Tax Exemption Benefit:**

Estimated value of Sales Tax exemption for facility construction:	<u>312,000</u>
Estimated Sales Tax exemption for fixtures and equipment:	<u>42,000</u>
Estimated duration of Sales Tax exemption:	<u>December 31, 2020</u>

**C. Mortgage Recording Tax Exemption Benefit:**

Estimated Value of Mortgage Recording Tax exemption:	<u>\$47,250</u>
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**D. Industrial Revenue Bond Benefit**

IRB inducement amount, if required:	<u>\$0</u>
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**E. Percentage of Project Costs financed from Public Sector sources:**

Total Value of Incentives:	<u>\$1,687,340.10</u>	<u>19.68%</u>
Sources of Funds (Section IV.B.)	<u>\$8,575,000.00</u>	

\*\* All estimates are based on current tax rates.

**VII. PROJECTED EMPLOYMENT**

Complete for each Applicant or User/Tenant

Company Name: Dolomite Products Co., Inc.

Applicant:  or User/Tenant:

You must include a copy of the most recent NYS-456 Quarterly Combined Withholding, Wage Reporting and Unemployment Insurance Return OR if you have multiple locations within New York State, the Bureau of Labor – BLS 3020 – Multiple Worksite Report

	Current # of jobs at proposed project location or to be relocated to project location	IF FINANCIAL ASSISTANCE IS GRANTED – project the number of FTE and PTE jobs to be RETAINED	IF FINANCIAL ASSISTANCE IS GRANTED – project the number of FTE and PTE jobs to be CREATED upon THREE Years after Project completion	Estimate number of residents of the Labor Market Area in which the Project is located that will fill the FTE and PTE jobs to be created upon THREE Years after Project Completion **
Full time (FTE)	45.0	45.0	5.0	5.0
Part Time (PTE)	0.0	0.0	0.0	0.0
Total	45.0	45.0	5.0	5.0

\*\* For purposes of this question, please estimate the number of FTE and PTE jobs that will be filled, as indicated in the third column, by residents of the Labor Marker Area, in the fourth column. The Labor Marker Area includes: Monroe County, Orleans County, Genesee County, Wyoming County, Livingston County, Ontario County, Wayne County, Yates County, and Seneca County chosen at the Agency's discretion.

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VIII. LOCAL LABOR

To be completed by all Applicants and Users/Tenants of Projects which include the construction of new, expanded or renovated facilities:

Company Name 800 Parker Hill Drive LLC  
Applicant:  or User/Tenant:

All project employees of the general contractor, subcontractor, or sub to a subcontractor (contractors) working on the project must reside within the following counties in the State of New York: Monroe, Genesee, Livingston, Ontario, Orleans, Seneca, Wayne, Wyoming or Yates. The All-Local Labor criterion will be verified based on employment, payroll and related records.

COMIDA understands that at certain times local labor may not be available within the local area. Under this condition, applicants are required to complete a waiver request of the All-Local Labor requirement prior to beginning construction. Contractors do not have to be local companies as defined herein, but must employ local people to qualify under the All-Local Labor criterion.

The foregoing terms have been read, reviewed and understood by the Applicant or User/Tenant and all appropriate personnel. Furthermore, the undersigned agrees and understands that the information contained herein must be transmitted and conveyed in a timely fashion to all applicable subcontractors, suppliers and materialman. Furthermore, the undersigned agrees to post and maintain a sign, provided by COMIDA, in a prominent, easily accessible location, identifying the project as a recipient of COMIDA assistance and the local labor requirements associated with this assistance.

Furthermore, the undersigned realizes that failure to abide by the terms herein could result in COMIDA revoking all or any portion of benefits it deems reasonable in its sole discretion for any violation hereof.

800 Parker Hill Drive LLC

(APPLICANT or USER/TENANT COMPANY)

 Member 12/16/2019  
Signature, Title Date

**IX. FEES**

**1. Application Fee - Send with Completed Application**

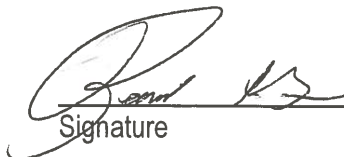
A non-refundable application fee of Three Hundred Fifty Dollars (\$350.00) shall be charged each applicant.

**2. Administrative Fee - Paid at Closing**

- (a) For tax-exempt IRB bond issues, the fee shall be one percent (1%) of the project amount. For projects that utilize a Payment In Lieu of Taxes (PILOT) agreement, an additional one-quarter percent (1/4%) will be added.
  - (b) For lease/leaseback transactions and taxable bond issues, the fee shall be one-half percent (1/2%) of the project amount. For projects that utilize a Payment In Lieu of Taxes (PILOT) agreement, an additional one-quarter percent (1/4%) will be added.
  - (c) For refunding outstanding COMIDA bond issues, the fee shall be one-quarter percent (1/4%) of the new issuance amount.
3. If a sales tax letter is required prior to closing, a non-refundable twenty-five percent (25%) of the Administrative Fee and Agency Counsel fee is payable at that time. This amount will be applied towards the Administrative fee and Agency Counsel Fee. The Sales Tax Letter shall only be for a three (3) month period. If the project does not have a formal closing within three (3) months of the sales tax letter being issued, and an extension is not granted, the balance of the Administrative fee and Agency Counsel fee become immediately due and payable.
4. Agency Counsel fee is one-third (1/3) of the Agency's Administrative fee, with a minimum fee for a lease/leaseback transaction of \$4,000.00.
5. Designated Bond Counsel fee is based on the complexity and amount of the transaction.

800 Parker Hill Drive LLC

(APPLICANT or USER/TENANT COMPANY)

 Signature, Member, Title, 12/16/2019 Date

## X. CERTIFICATION

The undersigned company officer and/or user/tenant officer each hereby certifies, on behalf of the company and/or user/tenant, respectively (each singularly and together, the "Applicant"), as follows:

- A. The information contained in this Application, including employment information, is true and correct. The Applicant is aware that any material misrepresentation made in this Application constitutes an act of fraud, resulting in revocation of COMIDA benefits.
- B. The undersigned, on behalf of the Applicant, hereby certifies that the Applicant, and all parties which own a minimum of 20% of the Applicant are current and will remain current on all real property, federal, state, sales, income and withholding taxes throughout the term of any agreements made in connection with this Application.
- C. Compliance with N.Y. GML Sec. 862(1): Applicant understands and agrees that the provisions of Section 862(1) of the New York General Municipal Law, as provided below, will not be violated if Financial Assistance is provided for the proposed Project:


§ 862. Restrictions on funds of the agency. (1) No funds of the agency shall be used in respect of any project if the completion thereof would result in the removal of an industrial or manufacturing plant of the project occupant from one area of the state to another area of the state or in the abandonment of one or more plants or facilities of the project occupant located within the state, provided, however, that neither restriction shall apply if the agency shall determine on the basis of the application before it that the project is reasonably necessary to discourage the project occupant from removing such other plant or facility to a location outside the state or is reasonably necessary to preserve the competitive position of the project occupant in its respective industry.

- D. Compliance with Applicable Laws: The Applicant confirms and acknowledges that the owner, occupant, or operator receiving Financial Assistance for the proposed Project is in substantial compliance with applicable local, state and federal tax, worker protection and environmental laws, rules and regulations.
- E. False and Misleading Information: The Applicant confirms and acknowledges that the submission of any knowingly false or knowingly misleading information may lead to the immediate termination of any Financial Assistance and the reimbursement of an amount equal to all or part of any tax exemption claimed by reason of the Agency's involvement the Project.
- F. Recapture: Should the Applicant not expend as projected or hire as presented, the Agency may view such information/status as failing to meet the established standards of economic performance. In such events, some or all of the benefits taken by the Applicant will be subject to recapture.
- G. Applicant hereby releases the County of Monroe Industrial Development Agency ("Agency") from, agrees that the Agency shall not be liable for, and agrees to indemnify, defend and hold the Agency harmless from and against any and all liability arising from or expense incurred by (A) the Agency's examination and processing of, and action pursuant to or upon, this Application, regardless of whether or not this Application or the Project described herein or the tax exemptions and other assistance requested herein are favorably acted upon by the Agency; (B) the Agency's acquisition, construction, renovation and/or equipping of the Project described herein; and (C) any further action taken by the Agency with respect to the Project; including, without limiting the generality of the foregoing, all causes of action and attorneys' fees and any other expenses incurred in defending any suits or actions which may arise as a result of any of the foregoing. Applicant hereby understands and agrees, in accordance with Section 875(3) of the New York General Municipal Law, that any New York State and local sales and use tax exemption claimed by the Applicant and approved by the Agency in connection with the Project may be subject to recapture by the Agency under such terms and conditions as will be set forth in the Agent Agreement to be entered into by and between the Agency and the Applicant. The Applicant further represents and warrants that the information contained in this

Application, including without limitation, information regarding the amount of New York State and local sales and use tax exemption benefits, is true, accurate and complete.

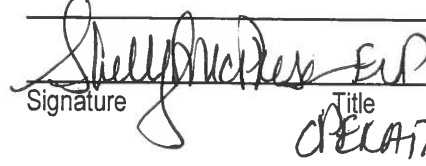
**APPLICANT COMPANY**

800 Parker Hill Drive LLC

	Member	12/13/20
Signature	, Title	Date

**USER/TENANT COMPANY**

Relph Benefit Advisors

	EP	12/17/2019
Signature	Title	Date

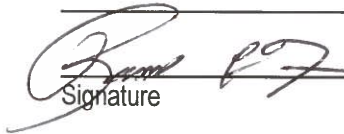
OPERATIONS

Application, including without limitation, information regarding the amount of New York State and local sales and use tax exemption benefits, is true, accurate and complete.

**APPLICANT COMPANY**

800 Parker Hill Drive LLC

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 Member 12/16/20  
Signature, Title Date

**USER/TENANT COMPANY**

Dolomite Products Co., Inc.

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 Metro CFO 12/16/2011  
Signature, Title Date

## **COMIDA Application**

### **Dolomite Products Co, Inc. Narrative**

Dolomite Products Co Inc will celebrate its 100<sup>th</sup> anniversary in 2020. The company was acquired by CRH in May of 2000. Dolomite has ready-mix operations, aggregate quarries, asphalt plants and paving construction crews that supply private contractors, state and federal agencies with raw materials and/or placed materials. The current main office that handles the administration tasks and the majority of management is in Penfield NY. This building is at maximum capacity with staff doubled up in offices occupying 9,372 square feet. The proposed space will be 13,500 square feet allowing for increased office space and an 85 -100-person conference center. This space will be in a new 40,000 square foot building to be constructed on 6.9 acres in the new Panorama Park Development in Penfield. Dolomite has acquired Mendon Sand and Gravel, Cleasons and AL Blades within the past few years and the growth trend is predicted to continue. This will require adding staff to maintain accounting documents, billing, safety training and management at many levels. Dolomite Products is part of the Metropolitan Group which also offers positions that can be located through NY, OH, PA and NJ. Having space available allows for those positions to be stationed with Dolomite in Rochester rather than these other states. In having the additional office space Dolomite's main office can remain in Monroe County and add the administrative and management staff necessary for their desired growth and offer divisional level representation as well. The division that Dolomite aligns with occupies from Michigan to Maine, Ontario Canada thru Pennsylvania, leaving Rochester very central to all destinations. The conference center will be utilized for training of Dolomite's people and conferences for the regional and divisional level requiring patronage of hotels and restaurants.

## **COMIDA Application**

### **Relph Benefit Advisors Narrative**

Founded in 1965, Relph Benefit Advisors (RBA) has been offering insurance and employee benefit services for more than 50 years. RBA provides innovative benefit plan designs, employee education, plan analytics, risk management and administrative solutions for employer groups of 100-3,000 employees.

In 2016, RBA merged with 23 other high performing insurance firms across the country to form Alera Group. With over 1,500 employees in 26 states, Alera Group now ranks as the 7<sup>th</sup> largest privately held employee benefits firm in the U.S.

Even though our parent company Alera Group is located outside of New York State, we are investing in and growing our business here in Monroe County. Between 2017 and 2019, we've expanded our business from New York State clients only to California, Colorado, Connecticut, Florida, Georgia, Illinois, Louisiana, Massachusetts, Maryland, Michigan, Ohio, Oregon, Pennsylvania, Rhode Island, South Carolina, Tennessee, and Wisconsin clients, along with clients in Toronto, Canada. Additionally, we are currently onboarding 70 new clients that also reside outside of New York State.

Our current space is 19,000 square feet and is not conducive to our needs because the space is located on two different floors and is broken up into two different sections on the first floor. Because of the layout of the building, we are not able to structure our growing business units in an efficient way so that teams are in close proximity to each other, which is necessary to conduct their work. Having a unified office space means we can cross train faster, communicate better and improve workflow throughout the office.

We have a training room in our current space that we've outgrown and are not able to host internal staff meetings. Relph Benefit Advisors also conducts seminars for our customers that we are limited in attendance due to the space. The space in our new facility will allow us to have internal all staff meetings and gives us the space needed to expand our client seminars.

When we look at professionals in the employee benefits industry, the average age is 42 years old. We believe that moving into a new facility that provides an updated look and feel, as well as natural light and air quality, is very important to our mission to attract and retain new people into our business. Additionally, the location of the new facility is more central to our current workforce, closer to the city of Rochester and conveniently located close to expressways. Relph Benefit Advisors will occupy approximately 16,800 square feet of space in a 40,000 square foot building which will be built on 6.9 acres in the new Panorama Park development in Penfield. Seventy-five percent of our current workforce will be positively impacted by a reduction in commute time and distance. We believe that taking care of our employees and providing the best possible experience for them results in the best possible service to our clients.