

# BUSINESS ASSISTANCE GUIDE

A REFERENCE GUIDE FOR EXPANDING,  
RELOCATING AND START-UP  
COMPANIES IN

Charlotte County



*It's **PURE** Economics.*

June 2006

**CHARLOTTE COUNTY, FLORIDA'S Business Assistance Guide** is compiled for information purposes only and does not attempt to address all aspects of the applicable United States, Florida and Charlotte County laws. While every effort has been made to verify accuracy, we strongly recommend contact with the appropriate federal, state and local government agencies, business advisors and the Charlotte County Economic Development Office (EDO) for the most up-to-date information.

Revised June 2006

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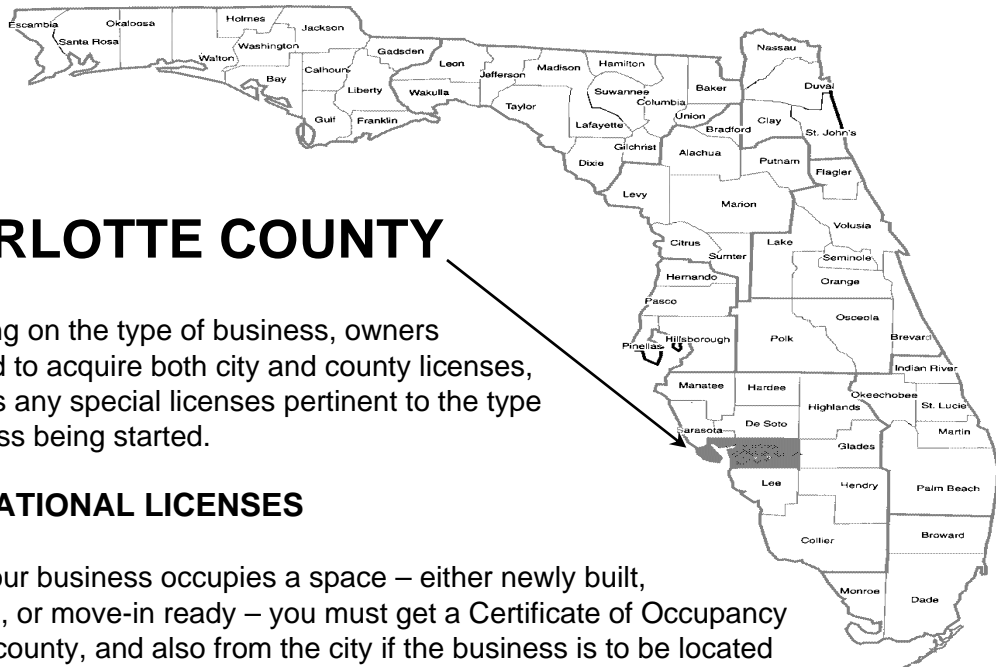
Note: T = Telephone  
F = Facsimile

# Business Checklist

## Checklist for Starting a Business

- Select Business Structure Type
- Prepare Business Plan
- Arrange Business Financing
- Determine Business Location
- Obtain Required Licenses and Permits/  
Registration
- Review Reporting Requirements

# Occupational License



## CHARLOTTE COUNTY

Depending on the type of business, owners may need to acquire both city and county licenses, as well as any special licenses pertinent to the type of business being started.

### OCCUPATIONAL LICENSES

Before your business occupies a space – either newly built, retrofitted, or move-in ready – you must get a Certificate of Occupancy from the county, and also from the city if the business is to be located in Punta Gorda, within city limits. You may go online or go in person to the Building Construction Services Department and request an “Occupancy Permit” or “Name Change Permit”. The Fire and Zoning Inspectors must visit the location before permits are issued.

The occupational license is issued on a yearly basis and fees vary with the occupation being licensed. Any contractor or sub-contractor who does work in the city or county must obtain a Certificate of Competency. This can be obtained from the County Building Construction Services Department or City Urban Design Department.

If there is a question regarding the requirement for a city license, contact the City Clerk’s Office. If there is a question regarding the requirement for a county license, contact the Building Construction Services Department of Charlotte County.

#### **Direct questions to:**

For Occupational License, Contractor License or starting a new business:

#### **Charlotte County Building Construction Services Department**

18400 Murdock Circle

Port Charlotte, FL 33948

T - (941) 743-1201 F - (941) 743-1220

[www.charlottecountyfl.com](http://www.charlottecountyfl.com)

**Permitting** questions pertaining to commercial development: (941) 743-1201

**Zoning:** (941) 743-1964

**Inspection Requests:** (941) 743-1204 or (941) 743-1205, OR

**Automated Inspection Request System:** (941) 743-1966

#### **City of Punta Gorda**

City Clerk’s Office (for Local Business Tax a.k.a. Occupational License)

326 West Marion Avenue

Punta Gorda, FL 33950

T - (941) 575-3369 F - (941) 575-3365

Code Compliance (for Contractor’s License)

T - (941) 575-3324 F - (941) 575-3347



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# State of Florida Requirements

Registering a business in Florida requires an entity to register not only at the local level, but also with the State of Florida. Corporate entities are usually required to register with the Division of Corporations, while many professions are required to register with the Department of Business and Professional Regulation. Contact the organizations below for more information and to determine your registration requirements.

## DIVISION OF CORPORATIONS

The following are services handled through the Division of Corporations:



- Fictitious Name Registration
- Service Mark Registration
- Alien Corporation
- Limited Liability Company
- Corporation - for Profit and not for Profit
- Trademark Registration
- Foreign Corporation
- Partnerships
- Federal Tax Liens

For more information contact:  
**Florida Department of State, Division of Corporations, Corporate Filings**  
 Information and Forms  
 P. O. Box 6327  
 Tallahassee, FL 32314  
 T - (850) 488-9000 Information  
 T - (850) 245-6052 Forms  
[www.sunbiz.org](http://www.sunbiz.org) -or- [www.dos.state.fl.us/doc/index.html](http://www.dos.state.fl.us/doc/index.html)

## DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION

The Department of Business and Professional Regulation deals primarily with activities relating to the business-related regulatory functions and the professions-related regulatory functions. Divisions within the DBPR include:



- Division of Administration
- Division of Pari-Mutuel Wagering
- Division of Hotels and Restaurants
- Division of Florida Land Sales, Condominiums and Mobile Homes
- Division of Alcoholic Beverages and Tobacco
- Division of Professions and Professional Boards
- Division of Real Estate
- Division of Certified Public Accounting
- Division of Regulation
- Division of Service Operations
- Division of Technology
- State Boxing Commission
- State Technology Office

For more information contact:  
**Department of Business and Professional Regulation**  
**DBPR Customer Contact Center**  
 1940 North Monroe Street  
 Tallahassee, FL 32399-0786  
 T - (850) 487-1395  
[www.state.fl.us/dbpr](http://www.state.fl.us/dbpr) -or- [www.myfloridalicense.com](http://www.myfloridalicense.com)



# State of Florida Requirements

All businesses interested in operating in the State of Florida should review the following requirements.

## ARTICLES OF INCORPORATION

- Articles of Incorporation must be prepared and executed for all corporations.
- ⇒ • Foreign corporations (non-Florida corporations) must have an office or registered agent located within the State of Florida.
- Foreign corporations, like Florida corporations, are responsible for filing annual reports and are treated equally in all other respects.

Appropriate forms and additional information can be obtained by contacting:

### **Florida Department of State, Division of Corporations, Corporate Filings Information and Forms**

P. O. Box 6327

Tallahassee, FL 32314

T - (850) 488-9000 Information

T - (850) 245-6052 Forms

[www.sunbiz.org](http://www.sunbiz.org) -or- [www.dos.state.fl.us/doc/index.html](http://www.dos.state.fl.us/doc/index.html)

## SALES TAX NUMBER

- ⇒ All businesses which sell, rent, or lease taxable property must register with the State of Florida Department of Revenue and be issued a Sales Tax Identification Number.

For information contact:

### **Florida Department of Revenue Sales Tax Registration**

5050 West Tennessee Street

Tallahassee, FL 32399-0100

T - (850) 488-6800

<http://sun6.dms.state.fl.us/dor/> -or- [www.myflorida.com/dor](http://www.myflorida.com/dor)

## FICTITIOUS NAME

- ⇒ • If a business is not incorporated or will use an assumed name for business purposes, it must be registered under the Fictitious Name Act.

For information contact:

### **Florida Department of State Division of Corporations**

P.O. Box 6327

Tallahassee, FL 32314

T - (850) 488-9000 Information

T - (850) 245-6052 Forms

[www.sunbiz.org](http://www.sunbiz.org) -or- [www.dos.state.fl.us/doc/index.html](http://www.dos.state.fl.us/doc/index.html)

## WORKERS' COMPENSATION

- Florida law requires employers to insure their employees against job related accidents:
  - ✓ if you are in an industry other than construction and have four or more employees, full-time or part-time, including yourself;
  - ✓ if you are in the construction industry and have 1 or more employees, full-time or part-time, including yourself;
  - ✓ if you are a state or local government;
  - ✓ if you are a farmer who employs more than 5 regular employees and not more than 12 other workers for seasonal agricultural labor lasting 30 days or more.
  
- An employer having employees in occupations which are excluded or exempt from coverage may voluntarily obtain coverage to avoid the risk of being sued by their employees in case of a work-related accident.
  
- To secure Worker's Compensation Insurance, contact your local insurance agent.

Additional information can be obtained by contacting:

**State of Florida, Division of Workers' Compensation**

200 East Gaines Street

Tallahassee, FL 32399-4228

T - (850) 413-1601 or T - (800) 742-2214

[www.fldfs.com/WC/](http://www.fldfs.com/WC/)

## EMPLOYER IDENTIFICATION NUMBER

- All businesses must obtain an Employer Identification Number from the United States Internal Revenue Service.

Further information can be obtained by contacting:

**United States Internal Revenue Service**

For General Information T - (800) 829-1040

For Businesses T - (800) 829-4933

TDD T - (800) 829-4059

[www.irs.gov/businesses/small/index.html](http://www.irs.gov/businesses/small/index.html)

## OCCUPATIONAL SAFETY AND HEALTH ADMINISTRATION (OSHA)

OSHA's mission is to assure the safety and health of America's workers by setting and enforcing standards; providing training, outreach, and education; establishing partnerships; and encouraging continual improvement in workplace safety and health.

### OSHA SERVICES

OSHA and its state partners have approximately 2100 inspectors, plus complaint discrimination investigators, engineers, physicians, educators, standards writers, and other technical and support personnel spread over more than 200 offices spread throughout the country. This staff establishes protective standards, enforces these standards and reaches out to employers and employees through technical assistance and consultation programs.

### EMPLOYEES CAN EXPECT OSHA TO:

- ✓ Promote their participation in the development and implementation of work site safety and health programs and OSHA interventions such as inspections and onsite consultants.
- ✓ Respond promptly to their requests for correction of serious hazards at their workplaces.
- ✓ Advise employees of their safety and health rights and responsibilities, and complete within 90 days investigations of charges of employer discrimination against employees involved in such activities.

### EMPLOYERS CAN EXPECT OSHA TO:

- ✓ Help them identify and control workplace hazards by offering a choice between partnership and traditional enforcement.
- ✓ Focus OSHA inspections on the most serious hazards in the most dangerous workplaces.
- ✓ Be respectful and professional.

### THE GENERAL PUBLIC CAN EXPECT OSHA TO:

- ✓ Make regulations and interpretations user-friendly.
- ✓ Work in partnership with business and labor to develop new standards that make real sense to real people.
- ✓ Expand training opportunities for private sector employees.
- ✓ Provide better access to OSHA information through publications and online materials.

For more information contact:

#### Occupational Safety and Health Administration

##### Tampa Area Office

5807 Breckenridge Parkway, Suite A

Tampa, FL 33610-4249

T - (813) 626-1177

F - (813) 626-7015

[www.osha.gov](http://www.osha.gov)

# Tax Structure

The tax structure in the State of Florida and Charlotte County are favorable for business expansion and start-up. The following taxes are applicable as noted.

## PRINCIPAL TAXES

- ⇒ Taxes are levied in the State of Florida and by local governments under State authority. The State of Florida Department of Revenue is responsible for tax administration.
- ⇒ Sole proprietors, estates of decedents, and testamentary trusts are not subject to a Florida income tax.
- ⇒ Businesses operating in Florida are subject to the following state and local taxes, all of which are generally deductible expenses in determining income for federal tax purposes.
  - Corporate Income Tax
  - Payroll Taxes
    - Unemployment
    - Worker's Compensation Insurance
  - Sales and Use Tax
  - Property Taxes
    - Real and Tangible Property
    - Intangible Property
  - Excise Taxes
- ⇒ Partnerships having a corporate partner are required to file information returns.
- ⇒ Limited Liability companies are subject to Florida corporate income tax, regardless of partnerships, as determined for federal purposes.

For information contact:

**Florida Department of Revenue**

**Fort Myers Service Center**

2295 Victoria Avenue, Suite 270

Fort Myers, FL 33901-3871

T - (239) 338-2400 or Toll Free: (800) 352-3671

<http://sun6.dms.state.fl.us/dor/> or [www.myflorida.com/dor](http://www.myflorida.com/dor)

Note: For exact tax information, contact a Certified Public Accountant (C.P.A.). See Appendix B.

## CORPORATE INCOME TAX

- Subchapter S-corporations, Limited Partnerships (not owned by at least one corporation), and tax-exempt organizations generally do not pay the State Corporate Income Tax.
- Florida has a State Corporate Income Tax on C-corporations.
- The State Corporate Income Tax rate is 5.5%.
- The tax base is the taxpayer's federal taxable income with certain modifications.
- An exemption of up to \$5,000 is subtracted to compute net Florida taxable income.

## INTANGIBLE PERSONAL PROPERTY TAX

- Florida's Intangibles Tax is an ad valorem levy. It applies to stocks, mutual funds, notes, bonds, accounts receivable and certain condominium, apartment and land leases.
- Exemptions for individual filers and corporations, partnerships and estates for the first \$250,000; the first \$500,000 for joint filers.
- Assets above exemptions are taxed at \$0.50 per thousand dollars of value.

## SALES AND USE TAX

Florida Sales Tax (6% Use Tax) County (1%) 7% is imposed on:

- Each sale, admission charge, storage, or rental unless the transaction is specifically exempt
- Purchases made in other states by persons or business entities for use in Florida.
- Manufacturers utilizing their own products.
- Special sales tax exemptions exist for motion picture, TV, recording activities, launch vehicles, fuel and payloads.

For information and forms contact:

**Florida Department of Revenue  
Fort Myers Service Center**

2295 Victoria Avenue, Suite 270

Fort Myers, FL 33901-3871

T - (239) 338-2400 or Toll Free: (800) 352-3671

[sun6.dms.state.fl.us/dor/](http://sun6.dms.state.fl.us/dor/) or [www.myflorida.com](http://www.myflorida.com) or

<http://www.myflorida.com/dor/forms/2005/gt300015.pdf> - Sales and Use Tax Guide for Business Owners

Note: For exact tax information, contact a Certified Public Accountant (C.P.A.).  
See Appendix B.



## RETAIL SALES TAX

- ⇒ Florida's Retail Sales Tax is 6%, imposed on tangible personal property items sold at retail to the ultimate consumer.
- ⇒ Purchases of certain machinery and equipment by qualifying manufacturers are exempt, after following a permitting process for new and expanding businesses.
- ⇒ Groceries, prescription medicines, household remedies, and most services are exempt.
- ⇒ Farm equipment used in plowing, planting, cultivating, and harvesting is taxed at 2.5%.

## ESTATE, GIFT AND INHERITANCE TAXES

- ⇒ Florida has no gift tax.
- ⇒ Florida does not impose an inheritance tax on the estate beneficiary.
- ⇒ No estate tax is imposed on estates of residents or citizens of Florida by the state in excess of the credit allowed by the federal tax. Therefore, the Florida Estate Tax does not increase the total amount of tax to be paid by the estate.

## EXCISE TAX

- ⇒ All domestic and foreign corporations doing business in Florida are required to file a Florida Emergency Excise Tax Return with the Florida Department of Revenue.
- ⇒ The rate of tax is 2.2% measured by certain depreciation deducted in determining the Florida Corporate Income Tax base.
- ⇒ The Emergency Excise Tax is allowed as a credit in the fifth year subsequent to the year for which the tax was paid.

## PAYROLL TAXES

- ⇒ Businesses are required to withhold estimated amounts due for Federal Income Tax and Social Security (retirement) Tax from wages paid to employees.
  
- ⇒ In addition, employers are required to withhold Unemployment Tax if they:
  - ✓ paid \$1,500 in wages within a calendar quarter;
  - ✓ have employed one person for any portion of a day in 20 different weeks during the calendar year, or
  - ✓ are liable for federal unemployment tax (FUTA) because of employment in another state.
  
- New employers must pay a tax at a rate of 2.7% of the first \$7,000 of each employee's annual compensation.
  
- After the company establishes an employment record (generally 36 months), it is given a revised rate based primarily on the history of the employee separations. This tax rate varies between 0.1% and 5.4%.
  
- ⇒ Special Liability Requirements Apply to the Following Employment Types:
  - Nonprofit Employers
  - Governmental Entities
  - Native American Tribes
  - Agricultural Employers
  - Employers of Employees Who Perform Domestic Services

<http://www.myflorida.com/dor/forms/2006/uct48enb.pdf> - Florida Unemployment Compensation Employer Handbook

## DOCUMENTARY STAMP TAX

Documentary Stamp Tax must be paid on the following, but is not limited to:

- ⇒ On Deed conveying interest in real estate: \$0.70 per \$100 consideration applies to the full amount. A minimum tax of 70¢ is required on all deeds.
- ⇒ On Bonds: \$0.35 per \$100 based upon the face value of the bond.
- ⇒ On Notes: \$0.35 per \$100 up to \$2,450.
- ⇒ On Mortgages, Liens, and Other Evidences of Indebtedness: \$0.35 per \$100 (or portion thereof) and is based on the amount of indebtedness or obligation secured, even if the indebtedness is contingent, up to the maximum of \$2,450.

For additional information contact:

### **Charlotte County Clerk's Office**

350 East Marion Avenue

Punta, Gorda, FL 33950

T – (941) 637-2199

[www.co.charlotte.fl.us/clrkinfo/clerk\\_default.htm](http://www.co.charlotte.fl.us/clrkinfo/clerk_default.htm)

## TOURIST DEVELOPMENT TAX

Charlotte County levies 4% on the total rental amount collected from any person or other party who rents, leases, or lets for consideration living quarters or accommodations in hotels, motels, apartment motels, rooming houses, tourist or trailer camps, mobile homes or condominiums for a period of 6 months or less.

To register contact:

### **Charlotte County Tax Collector**

18500 Murdock Circle

Port Charlotte, FL 33948

T - (941) 743-1911

F - (941) 743-1364

[www.cctaxcol.com](http://www.cctaxcol.com)



## INTERNET JOB SEARCHING SITES

There are many Internet sites available to employers to post job vacancies and for individuals looking for jobs to post their resumes. The following site is available through the joint efforts of the Economic Development Office and the Chamber of Commerce:

[www.CharlotteJobSpot.com](http://www.CharlotteJobSpot.com)

## SOUTHWEST FLORIDA WORKFORCE DEVELOPMENT BOARD CAREER AND SERVICE CENTERS

The Southwest Florida Workforce Development Board, Inc. was created as a partnership between business, labor, education, community and government services. Their goal is to support and promote economic growth through workforce development. They operate the Career and Service Centers which provide a network for comprehensive services and labor market information for employers, workers and job seekers.

Employers not only gain access to qualified job candidates, they also may qualify for special hiring and training incentives. The following services for employers are administered at the Career and Service Centers.

- ✓ Prescreening, Testing, Matching Potential Employees
- ✓ Listing and Maintaining Job Orders
- ✓ Training Programs
- ✓ Assisting with Down Sizing, Mergers and Layoffs
- ✓ Technical Assistance with Government Regulations and Programs

For more information contact the Charlotte County Economic Development Office or:

**SW Florida Workforce Development Board**  
24311 Walden Center Dr. Suite 200  
Bonita Springs, FL 34134  
T – 866-992-8463  
T – 239-992-8000  
F – 239-948-3359  
[www.workforceflorida.com](http://www.workforceflorida.com)

**Career and Service Center  
of Charlotte County**  
19500 Toledo Blade Boulevard  
Port Charlotte, FL 33948  
T - (941) 235-5900

[www.careerandservicecenter.org](http://www.careerandservicecenter.org)



***When expanding or locating your company to Charlotte County, you will find an eager labor force qualified to meet the demands of your business. Key labor force and training benefits offered in Charlotte County include:***

1. 36% of Charlotte County's population is in the labor working force.
2. The population of Charlotte County has increased by 28% between the period 1990 and 2000.
3. Over 60% of Charlotte County's graduating seniors continue their education at a vocational/technical center, community college or university. Many select an area school which include:
  - ***Florida Gulf Coast University***, Punta Gorda and Fort Myers  
www.fgcu.edu  
239-590-1000
  - ***New College of Florida***, Sarasota  
www.ncf.edu  
941-359-4269
  - ***IMPAC University***, Punta Gorda  
www.impacu.edu  
941-639-7512
  - ***Edison College***, Punta Gorda and Fort Myers  
www.edison.edu  
941-637-5629
  - ***Manatee Community College***, Venice  
www.mccfl.edu/pages/1.asp  
941-408-1300
  - ***Charlotte Technical Center***, Port Charlotte  
<http://charlottetechcenter.ccps.k12.fl.us>  
941-255-7500

See [www.PureEconomics.org/education/htm](http://www.PureEconomics.org/education/htm) for further information

## THE STATE OF FLORIDA PROVIDES A VARIETY OF TAX INCENTIVES, INCLUDING:

- ✓ NO corporate income tax on limited partnerships or subchapter S-corporations.
- ✓ NO state personal income tax guaranteed by constitutional provision.
- ✓ NO corporate franchise tax on capital stock.
- ✓ NO state-level property tax assessed.
- ✓ NO property tax on business inventories or on goods-in-transit for up to 180 days.
- ✓ NO sales and use tax on goods manufactured or produced in Florida for export outside the state.
- ✓ NO sales tax on purchases of raw materials incorporated in a final product for resale, including non-reusable containers or packaging.
- ✓ NO sales/use tax on boiler fuels or on generation of electricity.

## SALES AND USE TAX EXEMPTIONS ARE AS FOLLOWS:

- ✓ Semiconductor, defense and space technology-based industry transactions involving manufacturing or research and development equipment.
- ✓ Purchases of machinery and equipment used by a new or expanding Florida business to manufacture, produce or process tangible personal property for sale.
- ✓ Labor, parts and materials used in repair of and incorporated into machinery and equipment that qualify for sales tax exemption upon purchase (phased in over four years, 75% exempt on July 1, 2001). Including electricity used in the manufacturing process.
- ✓ Aircraft parts, modification, maintenance and repair, sale or lease of qualified aircraft.
- ✓ Commercial space activity—launch vehicles, payloads and fuel, machinery and equipment for production of items used exclusively at Spaceport Florida.
- ✓ Labor component of research and development expenditures.
- ✓ Any facility, device, fixture, machinery or equipment required for pollution control, abatement or monitoring of equipment used in manufacturing, processing or compounding items for sale.

Source: Enterprise Florida at [www.eflorida.com/financialadvantages/default.asp](http://www.eflorida.com/financialadvantages/default.asp)

# State Business Incentives

## THE STATE OF FLORIDA OFFERS THE FOLLOWING BUSINESS INCENTIVES:

- ✓ INCENTIVES FOR JOB CREATION IN TARGETED INDUSTRIES
  - Qualified Target Industry Tax Refund
- ✓ WORKFORCE TRAINING INCENTIVES
  - Quick Response Training Incentives
  - Incumbent Worker Training Program
- ✓ INCENTIVES FOR ROAD INFRASTRUCTURE
  - Economic Development Transportation Fund
- ✓ SPECIALIZED INCENTIVES
  - Rural Incentives
  - Urban Incentives
  - Enterprise Zones
  - Brownfields
- ✓ STREAMLINED PERMITTING AND REGULATIONS
  - Expedited Permitting
  - Online Permit Assistance

Source: Enterprise Florida

**County Incentives**

The Charlotte County Economic Incentive Development Program was adopted by the Board of County Commissioners to advance the mission of the County’s Economic Development Office.

The Program was specifically created to:

- Produce high-skill, high-wage value-adding jobs;
- Reduce the tax burden on residential properties by increasing non-residential tax revenues; and,
- Reduce the impact of economic downturns by diversifying the local economy.

The core of the Program is based upon two (2) vehicles – incentives for job development and incentives for capital investment. Any business that produces the required number of “Quality Jobs” (as defined later) and meets certain basic Program requirements is eligible to participate in the Program. Program participants are eligible to receive both employment and capital incentives.

**Employment Incentives**

Employment Incentives are linked to a business’ ability to generate and maintain “Quality Jobs” within Charlotte County. Quality Jobs are full-time jobs that:

1. Provide individual wages that equal or exceed the wage levels discussed below;
2. Provide full-time, year-round employment for ninety (90) percent or more of the total payroll of the company;
3. Provide a safe work environment (as defined in the Ordinance); and,
4. Provide a contribution equal to or exceeding fifty (50) percent of health insurance premiums for all full-time employees.

Businesses that are new to Charlotte County must create no less than ten (10) Quality Jobs. An expanding business must create no less than three (3) Quality Jobs. Quality Jobs must generally be created within two (2) years and must be kept filled for a minimum of two (2) years over a specified period. Except for County fiscal limitations, there are no limits upon the number of Quality Jobs for which a participant may receive Incentives.

Employment Incentive amounts are based on the “Florida Wage” as produced by Enterprise Florida and are as follows:

1. \$750.00 for Quality Jobs with salaries equal to or greater than the Florida Wage plus fifteen percent (15%).
2. \$1,000.00 for Quality Jobs with salaries equal to or greater than the Florida Wage plus fifty percent (50%).
3. \$1,500.00 for Quality Jobs with salaries equal to or greater than the Florida Wage plus one hundred percent (100%).

Additionally, Enterprise Florida, Inc. has identified certain target industries in its marketing and sales strategy. If a Program participant is a member of an Enterprise Florida target industry group, the rates of the Employment Incentives are doubled.

**Capital Incentives**

Capital Incentives are based upon specified levels of capital investments in the County. Capital investments are buildings, fixtures and all improvements to land, building and fixtures in the County. The rate for Land Improvement Incentives is \$1,000.00 per \$100,000.00 of real property value added to the County tax roll, during the businesses participation in the Program. The rate for Personal Property Incentives shall be \$1,000 per \$100,000 of value that the subject Personal Property adds to the tax roll that subjects the Personal Property to taxation under Title XIV, Florida Statutes, during the businesses participation in the Program. A business must meet the Quality Jobs and other requirements necessary to qualify as a Program participant in order to be eligible for Capital Incentives.

**Payment of Incentives**

Incentives are provided in the form of (a) set-offs or (b) direct compensation. If a participant owes the County sums for permitting, development, utility connection, impact or any similar fees, the participant will receive the incentive in the form of a set-off against the amount owed the County. If a participant does not owe the County any such sums, the participant will receive cash incentives.

The intervals at which participants will receive incentive payments will be determined by the County on a case by case basis. The County shall consider various factors in this determination including the participant’s size, age, stage of development, potential for long term success and other factors pertinent to the nature of the participant’s business operations and the welfare of the Program.

**Application Process**

Program applications and a Program Agreement form may be obtained from the Economic Development Office at 18501 Murdock Circle, Suite 502, Port Charlotte, Florida 33948 (941) 627-3023.



# Tax and Training Incentives

**ENTERPRISEFLORIDA Inc.  
PARTNERSHIP INFORMATION**

**BUSINESS INCENTIVES**

	QUALIFIED TARGET INDUSTRY TAX REFUND PROGRAM (QTI)	QUICK RESPONSE TRAINING PROGRAM (QRT)
TYPE OF INCENTIVE	TAX REFUND	GRANT
<i>Award Made to Whom</i>	Business	Training Provider on behalf of business
<i>Wage Requirement</i>	At least 115% of state, county or Metropolitan Statistical Area wage, whichever is lower. May be waived for rural or enterprise zone projects in special situations.	Goal is 115% of county or state wages, whichever is lower, may be waived for rural or enterprise zone projects in special situations.
<i>Number of Jobs Required</i>	At least 10 new full-time equivalent jobs or if an expansion, a 10% increase in employment. May be waived for rural and enterprise zone projects in special situations.	No minimum or maximum. If an expansion, a 10 percent increase in employment or 100 new full-time jobs, whichever is less.
<i>Available to Expanding Industry</i>	Yes	Yes
<i>Available to New Industry</i>	Yes	Yes
<i>Available to Retain Jobs</i>	No	As part of an expansion project
<i>Amount of Award</i>	\$3,000 per job (\$6,000 in a rural county or enterprise zone) Increased per job award for extremely high wages. Additional \$1000 if paying 150% or \$2000 if paying 200% of state, county, or MSA wage.	Negotiated with local training provider to meet industry need
<i>Payout Schedule</i>	Paid out over a minimum of four years	Reimbursement monthly to local training provider
<i>Specified Use of Funds</i>	None	Direct training costs, instructors' wages, curriculum development, resource materials, training equipment (cannot be used for trainees' wages).
<i>Local Support Required</i>	Yes – 20 % of total tax refund (businesses may exercise exemption in REDI counties).	Yes – local training provider serves as fiscal agent for grant funds; endorsement by local economic development organization.
<i>"But For" Incentive</i>	Yes	No
<i>Eligible Industries/ Businesses/Activities</i>	Manufacturing Facilities; Wholesale Trade; Information Industries; Finance & Insurance Services; Professional, Scientific & Technical Services; Management Services; Administrative & Support Services  <b>Only businesses serving multi-state and/or international markets are eligible. Business must be able to locate in other states.</b>	Business must produce a good or service for markets outside the local area.
<i>Ineligible Industries/ Businesses/Activities</i>	Any retail activity; any electrical utility company; any phosphate or solid minerals severance, mining, or processing operation; any oil or gas exploration or production operation; or any firm subject to regulation by the Division of Hotels and Restaurants of DBPR.	Businesses that are producing local goods, providing a local service or that are retention in nature. Training programs that are not available at the local store.
For further information call:	(941)627-3023 Charlotte County Economic Development Office	(941)627-3023 Charlotte County EDO

www.eflorida.com

# Transportation Incentives

**ENTERPRISEFLORIDA Inc.  
PARTNERSHIP INFORMATION**

**BUSINESS INCENTIVES**

	<b>ECONOMIC DEVELOPMENT TRANSPORTATION FUND (Road Fund)</b>	<b>QUALIFIED DEFENSE CONTRACTOR TAX REFUND PROGRAM (QDC)</b>
<b>TYPE OF INCENTIVE</b>	<b>GRANT</b>	<b>TAX REFUND</b>
<i>Award Made to Whom</i>	Local Government on behalf of business	Business
<i>Wage Requirement</i>	No requirement but is a consideration	At least 115% of the state, metropolitan statistical area (MSA), or the local average wages. For a project located in a rural city, rural county or in an enterprise zone, the wage requirement may be waived in special circumstances. A rural city means a city with population of 10,000 or less (or less than 20,000 with prior approval). A rural county means a county with population of 75,000 or less.
<i>Number of Jobs Required</i>	Permanent full-time positions must be created. May be waived if project is located in an area experiencing economic distress.	Consolidations are required to create at least 80 jobs or 25% increase in Florida employment. 'Reuse' projects must create 100 new jobs.
<i>Available to Expanding Industry</i>	Yes	Yes
<i>Available to New Industry</i>	Yes	Yes
<i>Available to Retain Jobs</i>	Yes	Yes
<i>Amount of Award</i>	Up to \$2 million based on the cost of the necessary improvements. Limited to \$5,000 (\$7,500 in distressed area) per job created and/or retained.	Up to \$5,000 per job and not to exceed a total of \$7.5 million
<i>Payout Schedule</i>	Paid out to local governmental entity as needed for construction	Paid out over a minimum of four years
<i>Specified Use of Funds</i>	Design and engineering costs; construction costs of transportation project; traffic signals	None
<i>Local Support Required</i>	Yes – right of way	Yes – 20% of total tax refund (businesses may exercise).
<i>"But For" Incentive</i>	Yes	Yes
<i>Eligible Industries/ Businesses/Activities</i>	Manufacturing Facilities; Wholesale Trade; Information Industries; Finance & Insurance Services; Professional, Scientific & Technical Services; Management Services; Administrative & Support Services  <b>Only businesses serving multi-state and/or international markets are eligible. Business must be able to locate in other states.</b>	Derive not less than 60% of its Florida gross receipts from United States Department of Defense of the United States Department of Homeland Security contracts or subcontracts in the applicant's last fiscal year and not less than an average of 60% over the five years preceding the date an application is submitted.
<i>Ineligible Industries/ Businesses/Activities</i>	Any retail activity, electrical utility company, distributors, hotels, convention centers (Some exceptions for Enterprise Zones, Distressed Areas and Rural Economic Development Initiative Counties)	See above
<i>For further information call:</i>	(941) 627-3023 Charlotte County Economic Development Office	(941) 627-3023 Charlotte County Economic Development Office

www.eflorida.com



## FOREIGN TRADE

Florida's foreign trade had an estimated output impact of \$90 billion. Approximately 1,200 different foreign manufacturing and commercial operations function in Florida.

Charlotte County's geographic proximity to major foreign markets is highly advantageous. The Charlotte location greatly facilitates a company's ability to distribute its products internationally, with easy access to both the European and South American markets. Charlotte County is equally accessible to Latin America and the Pacific Rim.

## FOREIGN TRADE ZONE

A Foreign Trade Zone is a specially designated area, in or adjacent to a U.S. Customs Port of Entry, which is considered outside the customs territory of the U.S.

Charlotte County Airport Industrial Park is a Foreign Trade Zone. The land within the zone is considered to be outside customs territory of the U.S. For businesses going global, some of the benefits are: no duty is ever charged on merchandise while it is in the Zone; no duty is paid on goods transferred from one Zone to another; the lower duty rate between components and the finished product applies; no duty on rejected or defective parts; duty exemptions on re-exports, if merchandise is re-exported after being placed in the Zone, no duty is ever paid; duty elimination on waste and scrap; no duty on domestic content or value added, final duties are assessed on foreign contents only; and relief from local ad valorem taxes. Information about the National Association of Foreign-Trade Zones can be found at **Internet Address: [www.naftz.org](http://www.naftz.org)**

## ENTERPRISE FLORIDA INTERNATIONAL TRADE AND ECONOMIC DEVELOPMENT OFFICE PARTNERSHIP

Markets and recruits new business expansions and relocations to the State of Florida. Assists existing businesses with expansions to domestic and international markets.

For information contact:

**Enterprise Florida**  
**Office of International Trade & Business Development**  
 T - (305) 569-2650  
[www.eflorida.com](http://www.eflorida.com)

# International Business

## SEAPORTS

### **Port of Miami**

**Distance from Charlotte Co.: est. 180 miles**

Contact:

*Port of Miami*

1015 N. America Way - 2nd Floor

Miami, FL 33132

E-Mail: [portofmiami@miamidade.gov](mailto:portofmiami@miamidade.gov)

T - (305) 371-7678

F - (305) 347-4843

[www.miamidade.gov/portofmiami/](http://www.miamidade.gov/portofmiami/)

### **Port Everglades**

**Distance from Charlotte Co.: est. 210 Miles**

Contact:

*Port Everglades Business Office*

1850 Eller Drive

Fort Lauderdale, FL 33316

E-Mail: [PortEverglades@broward.org](mailto:PortEverglades@broward.org)

T - (954) 523-3404

F - (954) 765-5345

[www.co.broward.org/port/welcome.htm](http://www.co.broward.org/port/welcome.htm)

### **Port of Manatee**

**Distance from Charlotte Co.: est. 100 Miles**

Contact:

*Manatee County Port Authority*

300 Tampa Bay Way

Palmetto, FL 34221-6608

E-Mail: [portoffice@portmanatee.com](mailto:portoffice@portmanatee.com)

T - (941) 722-6621

F - (941) 729-1463

[www.portmanatee.com](http://www.portmanatee.com)

### **Port of Tampa**

**Distance from Charlotte Co: est. 100 Miles**

Contact:

*Tampa Port Authority*

1101 Channelside Drive

Tampa, FL 33602

E-Mail: [info@tampaort.com](mailto:info@tampaort.com)

T - (813) 905-7678 1-800-741-2297

F - (813) 905-5109

[www.tampaort.com](http://www.tampaort.com)

## INTERNATIONAL AIRPORTS

### **S. W. Florida International Airport**

**Distance from Charlotte Co.: est. 25 miles**

Contact:

*Lee County Port Authority*

11000 Terminal Access Road, Suite 8671

Fort Myers, FL 33913-8899

T - (239) 590-4800

[www.flylcpa.com](http://www.flylcpa.com)

### **Miami International Airport**

**Distance from Charlotte Co.: est. 160 Miles**

Contact:

*Dade County Aviation Department*

P.O. Box 592075

Miami, FL 33159

T - (305) 876-7857

F - (305) 876-0948

[www.miami-airport.com](http://www.miami-airport.com)

### **Tampa International Airport**

**Distance from Charlotte Co.: est. 100 Miles**

Contact:

*Hillsborough County Aviation Authority*

P.O. Box 22287

Tampa, FL 33622

T - (813) 870-8700

F - (813) 875-6670

[www.tampaairport.com](http://www.tampaairport.com)

## FLORIDA EXPORT FINANCE CORPORATION

The Florida Export Finance Corporation (FEFC) was created by the State of Florida as a not-for-profit corporation, with a mandate to expand employment and income opportunities by supporting the export of goods and services from the State.

The FEFC offers information, technical and consulting assistance to exporters throughout the State of Florida. Financial assistance, though, is their chief service. The FEFC will guarantee a lender's revolving line up to a maximum of \$500,000, and make direct loans for a single transaction up to a maximum of \$50,000. Applicants for a direct loan or a loan guarantee must be exporters based in Florida who have been turned down by at least one potential lender.

The FEFC is a member of the City/State program of the Export-Import Bank of the United States and offers Florida exporters access to U.S. Government export assistance programs offered by the Ex-Im Bank and the SBA. Services include packaging for the loan, insurance and guarantee programs offered by these agencies. The FEFC is the holder of an Ex-Im Bank Umbrella Policy which allows Florida exporters easy access to political and credit risk insurance and has Ex-Im Bank delegated authority for working capital loan guarantees up to \$1,000,000.

For more information contact the EDO or:

**Florida Export Finance Corporation**  
10400 N.W. 33<sup>rd</sup> Street, Suite 200  
Miami, FL 33172-5902  
E-Mail: [fefc@gate.net](mailto:fefc@gate.net)  
T - (786) 845-0400  
F - (786) 845-0404  
[www.dos.state.fl.us/fefc](http://www.dos.state.fl.us/fefc)

**Export-Import Bank of the United States  
Miami Regional Office**  
5835 Blue Lagoon Drive Suite 203  
Miami, FL 33126  
T- (305)526-7436  
F- (305)526-7435  
[www.exim.gov](http://www.exim.gov)

## United States Department of Commerce

Federal laws affect trade policy and will directly affect a business that imports or exports. The U.S. Department of Commerce is an experienced, leading-edge worldwide organization helping U.S. companies meet the challenges of the global economy. They offer many services for free or at minimal costs for international trade opportunities around the world.

For information regarding trade policies contact:

**U.S. Department of Commerce**  
**Clearwater Export Assistance Center**  
13805 58th Street N. Suite 1-200  
Clearwater, FL 33760  
E-mail: [Office.Clearwater@mail.doc.gov](mailto:Office.Clearwater@mail.doc.gov)  
T – (727) 893-3738  
F – (727) 893-3839  
[www.export.gov/cs](http://www.export.gov/cs)



## U.S. SMALL BUSINESS ADMINISTRATION (SBA) PROGRAMS

### SBA Export Working Capital Program

The Export Working Capital Program (EWCP) was designed to provide short-term working capital to exporters. It supports export financing to small businesses when financing is not otherwise available on reasonable terms. The program encourages lenders to offer export working capital loans by guaranteeing repayment of up to \$1.5 million or 90 percent of a loan amount, whichever is less. A loan can support a single transaction or multiple sales on a revolving basis.

Designed to provide short-term working capital to exporters, the EWCP is a combined effort of the SBA and the Export-Import Bank. The two agencies have joined their working capital programs to offer a unified approach to the government's support of export financing. The EWCP uses a one-page application form and streamlined documentation with turnaround of about 10 days or less. A letter of prequalification is also available from the SBA.

### SBA International Trade Loans

If your business is preparing to engage in or is already engaged in international trade, or is adversely affected by competition from imports, the International Trade Loan Program is designed for you. SBA can guarantee up to 85 percent of loans of \$150,000 and less, and up to 75 percent of loans above \$150,000. The maximum guaranteed amount is \$1,250,000. The applicant must establish that the loan will significantly expand or develop an export market, is currently adversely affected by import competition, will upgrade equipment or facilities to improve competitive position, or must be able to provide a business plan that reasonably projects export sales sufficient to cover the loan.

The maximum guaranteed amount can go up to \$1,750,000 under the following circumstances: (1) The small business has been approved for an IT loan, and (2) the business has applied for a separate working capital loan (or loans) under EWCP and/or other 7(a) loan programs. When there is an IT loan and a separate working capital loan, the maximum SBA guaranty on the combined loans can be up to \$1,750,000 as long as the SBA guaranty on the working capital loan does not exceed \$1,250,000. In all cases, to receive the maximum SBA guaranty amount of \$1,750,000, the financing package for the small business must include an IT loan that was approved after December 7, 2004.

For Information contact:

#### U.S. Small Business Administration

#### South Florida District Office

100 S Biscayne Boulevard, 7<sup>th</sup> Floor

Miami, FL 33131

T – 305-536-5521 or Toll Free 800-U-ASK-SBA (800-827-5722)

F – 305-536-5058

[www.sba.gov](http://www.sba.gov)



## PATENTS AND TRADEMARKS

### ➤ PATENTS

- ✓ A patent is a property right granted by the Government of the United States of America to an inventor “to exclude others from making, using, offering for sale, or selling the invention throughout the United States or importing the invention into the United States” for a limited time in exchange for public disclosure of the invention when the patent is granted.
- ✓ The United States patent protects your invention only in this country. In most cases it is necessary to obtain a license from the Commissioner of Patents and Trademarks before you can file for a patent in another country.

### ➤ TRADEMARKS

- ✓ Trademarks are used to identify goods, that is, physical commodities, which may be natural or manufactured or produced, and which are sold or otherwise transported or distributed.

### ➤ SERVICE MARKS

- ✓ Service marks are used to identify services, that is, intangible activities, which are performed by one person for the benefit of a person or persons other than himself, either for pay or otherwise.

The U.S. Patent and Trademark Office cannot assist in preparation of application papers and strongly advises prospective applicants to engage the services of a patent attorney or agent. Applicants may consult the local telephone directory or see the EDO directory for a listing of EDO Attorney contacts (Appendix A).

For more information or to obtain an application contact:

**U.S. Patent and Trademark Office**  
**Office of Public Affairs**

PO Box 1450

Alexandria, VA 22313-1450

T - (571) 272-1000 Customer Service

T - (800) 786-9199 Automated Information Line

[www.uspto.gov](http://www.uspto.gov)



It's **PURE** Economics.

# Intellectual Property

## COPYRIGHTS

A Copyright is a form of protection provided by the laws of the United States (title 17, U.S. Code) to the authors of “original works of authorship” including literary, dramatic, musical, artistic and certain other intellectual works. This protection is available to both published and unpublished works. In addition, certain authors of works of visual art have the rights of attribution and integrity as described in section 106A of the 1976 Copyright Act.

It is illegal for anyone to violate any of the rights provided by the copyright code to the owner of copyright.

Copyrightable works include, but are not limited to the following categories:

1. Literary works;
2. Musical works, including any accompanying words;
3. Dramatic works including any accompanying music;
4. Pantomimes and choreographic works;
5. Pictorial, graphic and sculpture works;
6. Motion pictures and other audiovisual works;
7. Sound recording and
8. Architectural works.

## INTERNATIONAL COPYRIGHT PROTECTION

There is no such thing as an “international copyright” that will automatically protect an author’s writings throughout the entire world.

Protection against unauthorized use in a particular country depends, basically, on the national laws of that country. However, most countries do offer protection to foreign works under certain conditions, and these conditions have been greatly simplified by international copyright treaties and conventions.

For detailed information contact:

**U.S. Copyright Office - Library of Congress**

101 Independence Avenue SE

Washington, DC 20559-6000

T - (202) 707-3000

[www.copyright.gov](http://www.copyright.gov)

## CHARLOTTE COUNTY ECONOMIC DEVELOPMENT OFFICE (EDO)

### EDO's MISSION

Encourage the recruitment, expansion and retention of diversified high impact industry

- Create high skill-high wage jobs
- Diversify the economy and tax base

The Economic Development Office's (EDO) staff of economic development professionals provides an array of in-depth services for local, domestic and international businesses seeking assistance with relocation or expansion. These services, provided to our clients **free of charge** and on a **confidential** basis, include:

**BUSINESS MEETINGS:** Many business people find talking to representatives of local companies in a similar industry beneficial in the site selection process. The EDO arranges such meetings to help clients gauge the compatibility of their businesses with the marketplace. Additionally, the EDO can arrange meetings with local, state and federal agencies to discuss permitting, zoning, utilities and other important issues. Our office serves as Ombudsman to the business community.

**COMMUNITY TOURS:** The EDO introduces Charlotte County to its clients, highlighting the area's business sites and facilities, housing, schools, cultural programs and quality of life. Individualized programs for relocating key employees to the area are also offered.

**DEMOGRAPHIC AND STATISTICAL INFORMATION:** The EDO's research staff provides economic information on Charlotte County and Southwest Florida, such as demographics, utilities, taxes, wages, education, labor availability and costs, and support services.

**EMPLOYEE TRAINING/RECRUITING:** The EDO acts as a liaison between new and expanding businesses and local educational systems and the Southwest Florida Workforce Development Board to develop customized employee training and/or employment programs. Additionally, the EDO can assist with obtaining state grants for training.

...EDO Continued

# Business Assistance

**FINANCIAL ASSISTANCE:** Working with state and local agencies, the EDO can provide information on such funding sources as the Small Business Administration (SBA) and Enterprise Florida. The EDO will also arrange meetings with local financial institutions to discuss financing options.

**SITE SELECTION:** Working closely with area landowners, developers and brokers, the EDO maintains a database of available manufacturing, warehousing and office space, as well as industrial parks, office parks and freestanding sites. We can assist in locating available sites that meet your requirements.

**WEB PAGE:** The Charlotte County Economic Development Office provides business assistance on our web page.

**Visit us at:** [www.PureEconomics.org](http://www.PureEconomics.org)

## EDO Workshops And Seminars

The EDO sponsors several small business development workshops and seminars throughout the year. FGCU's Small Business Development Center provides trained instructors. Topics include:

- ❖ Marketing on a Shoestring
- ❖ Cash Flow Made Easy
- ❖ Using the Internet in Your Small Business
- ❖ What Your Small Business Needs to Succeed in Charlotte

*To inquire about any of the above or for additional information contact:*

**Economic Development Office**

18501 Murdock Circle, Suite 502

Port Charlotte, FL 33948

E-Mail: [PureEconomics@charlottecountyfl.com](mailto:PureEconomics@charlottecountyfl.com)

T - (941) 627-3023

T - (800) 729-5836

F - (941) 627-6314

[www.PureEconomics.org](http://www.PureEconomics.org)



# ENTERPRISEFLORIDA

Enterprise Florida, Inc. is a partnership between Florida's government and business leaders and is the principal economic development organization for the State of Florida. Its mission is to increase economic opportunities for all Floridians, by supporting the creation of quality jobs, a well-trained workforce and globally competitive businesses. It pursues this mission in cooperation with its statewide network of economic development partners.

## FLORIDA OFFICES

### **Enterprise Florida, Inc. (EFI)**

390 North Orange Avenue  
Suite 1300  
Orlando, FL 32801  
T - (407) 316-4600  
F - (407) 316-4599

### **EFI - Tallahassee**

325 John Knox Road  
Atrium Building Suite 201  
Tallahassee, FL 32303  
T - (850) 488-6300  
F - (850) 922-9595

### **EFI - Miami**

2801 Ponce de Leon Boulevard  
Suite 700  
Coral Gables, FL 33134  
T - (305) 569-2650  
F - (305) 569-2685

## INTERNATIONAL OFFICES

### **BRAZIL**

Carlos Heckmann, Sr., Director  
Enterprise Florida Brazil Office  
Avenida Nove de Julho, 3229 - #501-502  
Jardim Paulista  
CEP 01407-000, Sao Paulo, SP, Brazil  
T - 011 (55-11) 3884-8243  
F - 011 (55-11) 3884-8243  
[www.eflorida.com/brazil](http://www.eflorida.com/brazil)

### **CANADA**

Larry March, Director  
Enterprise Florida Canada Office  
1370 Don Mills Road, Suite 300 Third Floor  
Don Mills, ON, Canada M3B 3N7  
T - +1 (416) 926-1590  
F - +1 (416) 642-3988  
[www.eflorida.com/canada](http://www.eflorida.com/canada)

### **GERMANY**

Franziska Rudolph, Deputy Director  
Enterprise Florida Germany Office  
Karolinenplatz 3  
Im Amerika Haus,  
D-80333 Munich, Germany  
T - 011+49 (0)89 9901 3665  
F - 011+49 (0)89 9901 3667  
[www.eflorida.com/germany](http://www.eflorida.com/germany)

### **CHINA**

Mr. Peng Zheng  
Enterprise Florida China Liason Office  
#1206 West Tower, 12<sup>th</sup> Floor Twin Tower  
B-12 Jianguomenwai Avenue  
Chaoyang District Beijing 100022  
China  
T - 011+86 10 6566 1968/ 1278  
F - 011+86 10 6566 1258  
[www.eflorida.com/china](http://www.eflorida.com/china)

Note: T = Telephone  
F = Facsimile

# ENTERPRISEFLORIDA

## International Offices Continued

### **CZECH REPUBLIC**

Jan Kozubek, Director  
Enterprise Florida Czech Office  
Apolinarska 6  
12800 Praha 2 Prague Czech Republic  
T - 011 +420 (2) 249-20632  
F - 011 +420 (2) 249-20693

### **JAPAN**

Sam Tabuchi, Director  
Enterprise Florida Japan Office  
10, Ichibancho, Chiyoda-ku  
Sagamiya #2 Building  
Tokyo 102-0082, Japan  
T - 011 +81 (3) 3230-0505  
F - 011 +81(3) 3230-0507  
[www.eflorida.com/japan](http://www.eflorida.com/japan)

### **MEXICO**

Ana Arroyo Yllanes, Director  
Enterprise Florida Mexico Office  
Pestalozzi No. 1204 Int. 303  
Col. Del Valle D.F 03100 Mexico  
T - 011 +52 (55) 2455-3971  
F - 011 +52 (55) 2455-3974  
[www.eflorida.com/mexico](http://www.eflorida.com/mexico)

### **SPAIN**

Sergio Reyes, Director  
Enterprise Florida Spain Office  
Conde de Aranda, 13  
28001 Madrid, Spain  
T - 011 +34 (91) 781-3483  
F - 011 +34 (91) 781-3452

### **UNITED KINGDOM**

Tracey Smith, Director  
Enterprise Florida UK & Ireland Office  
Grosvenor Gardens House, Suite 197  
35-37 Grosvenor Gardens  
London SW1W 0BS, United Kingdom  
T - 011 +44 (20) 7808 6910  
F - 011 +44 (20) 7821 7966  
[www.eflorida.com/uk](http://www.eflorida.com/uk)

### **ISRAEL**

Nurit Gazit, Deputy Director  
Enterprise Florida Israel Office  
15 Aba Hilel Street, 7th Floor  
Ramat-Gan 52511, Israel  
T - 011 +972 (3) 575-2020  
F - 011 +972 (3) 575-3310  
[www.eflorida.com/israel](http://www.eflorida.com/israel)

### **SOUTH AFRICA**

Tongila Manly, Managing Director  
Enterprise Florida Africa Office  
2 Bompas Road, Dunkeld West  
Johannesburg, South Africa 2060  
T - 011 +27 (11) 771-2222  
F - 011 +27 (11) 341-0035

### **TAIWAN**

Wennie Chen, Director  
Enterprise Florida Taiwan Office  
5 Hsin Yi Road, Sec. 5  
Taipei World Trade Center, Suite #7E0-1  
Taipei, ROC TAIWAN  
T - 011 +886 (22) 758-5181  
F - 011 +886 (22) 723-5892  
[www.eflorida.com/taiwan](http://www.eflorida.com/taiwan)

### **VENEZUELA**

Laura Ingino, Assistant Director  
Enterprise Florida Venezuela Office  
2da. Avenida de Campo Alegre  
Torre Credival, Piso 6  
Campo Alegre, Caracas 1010-A Venezuela  
T - 011 (58-212) 263-0833 ext. 151  
F - 011 (58-212) 263-2060

Note: T = Telephone  
F = Facsimile

# ENTERPRISEFLORIDA

## INTERNATIONAL FIELD OFFICES

**Enterprise Florida, Inc.**  
Coral Gables International Field Office  
2801 Ponce de Leon Boulevard, Suite 700  
Coral Gables, FL 33134  
T - (305) 569-2650  
F - (305) 569-2686

Michael Schifffhauer  
**Enterprise Florida, Inc.**  
Orlando International Field Office  
390 North Orange Avenue Suite 1300  
Orlando, FL 32801  
T - (407) 316-4730  
F - (407) 316-4599

Ken Cooksey  
**Enterprise Florida, Inc.**  
Tallahassee International Field Office  
Atrium Building - Suite 201  
325 John Knox Road  
Tallahassee, FL 32303  
T - (850) 922-8832  
F - (850) 922-9595

Rebecca Torres-Lundh  
**Enterprise Florida, Inc.**  
Tampa International Field Office  
615 Channelside Drive, Suite 108  
Tampa, FL 33602  
T - (813) 276-9430  
F - (813) 223-7899

John Diep  
**Enterprise Florida, Inc.**  
Boca Raton International Field Office  
777 Glades Road, Bldg. T-10  
Boca Raton, FL 33431  
T - (561) 362-5626  
F - (561) 362-5634

William Cronin, Jr.  
**Enterprise Florida, Inc.**  
Jacksonville International Field Office  
Three Independent Drive  
Jacksonville, FL 32202  
T - (904) 359-6600  
F - (904) 359-6602

Gregory A. Miller  
**Enterprise Florida, Inc.**  
Pensacola International Field Office  
117 West Garden Street  
Pensacola, FL 32501  
T - (850) 595-5416  
F - (850) 595-5419

Note: T = Telephone  
F = Facsimile

## **SMALL BUSINESS DEVELOPMENT CENTER (SBDC)**

The SBDC is a non-profit organization and is jointly funded through a Partnership between the U.S. Small Business Administration (SBA) and Florida Gulf Coast University's College of Business.

## **SMALL BUSINESS ADMINISTRATION**

The SBA has designed an Internet site to provide easy on-line access to many of the most frequently asked questions about business and the federal government. It also provides interactive tools that can be used to find solutions to situations involving the environment, health and safety, and permits companies to download many of the forms necessary for regulatory compliance.

For information go to:

[www.sba.gov](http://www.sba.gov) or [www.business.gov](http://www.business.gov)

## **FLORIDA GULF COAST UNIVERSITY**

The Small Business Development Center has a large and productive small business development program. Counseling sessions are confidential and free. The SBDC provides training programs and counseling on such aspects of business as:

- ◆ Financial and Accounting Analysis
- ◆ Procurement and Contracting Assistance
- ◆ Market Analysis
- ◆ Commercial Loan Packages
- ◆ Record Keeping
- ◆ Microcomputer Cost/Benefit Analysis
- ◆ Steps to Starting a Business
- ◆ How to Bid on Government and Other Contracts
- ◆ Personnel Management
- ◆ International Trade
- ◆ Business Plans
- ◆ Feasibility Studies

For more information contact:

**Florida Gulf Coast University**  
**Small Business Development Center**

12751 Westlinks Drive  
 Building III, Suite 8  
 Fort Myers, FL 33913-8615  
 T - (239) 225-4220  
 F - (239) 225-4221  
<http://cli.fgcu.edu/sbdc>

## **CENTER FOR LEADERSHIP AND INNOVATION (CLI)** **FLORIDA GULF COAST UNIVERSITY**

Florida Gulf Coast University's **Center for Leadership and Innovation** delivers the region's premier executive and technology education programs, and provides a focal point for applied, consultative research in support of the business community of Southwest Florida. The center includes:

- ✓ The Executive MBA Program designed for mid- and senior-level executives, offering them the opportunity to significantly increase their personal and organizational effectiveness.
- ✓ The Lucas Institute for Real Estate Development and Finance serves as the primary linkage between FGCU and the local real estate industry, fostering academic programs of nationally recognized quality.
- ✓ The Small Business Development Center which delivers up-to-date counseling, training and technical assistance in all aspects of small business management.
- ✓ The Institute for Chinese Studies serving as the coordinating center with Nankai University as well as business leaders in China.
- ✓ The Regional Economic Research Institute which performs economic research, analysis and forecasting for both the region and the individual economic development organizations in the area.
- ✓ The Institute for Advances in Human Resources which is a great resource for Southwest Florida's human resource management community .
- ✓ Adventure Training Concepts is a training partner of CLI, which specializes in leadership development, teambuilding, communication, organizational change, management training and empowerment.

For more information contact:

### **Florida Gulf Coast University**

12751 Westlinks Drive  
Building III, Unit 8  
Fort Myers, FL 33913  
T - (239) 225-4200  
E-mail: cli@fgcu.edu

## **THE CENTER FOR PROFESSIONAL DEVELOPMENT & CONTINUING EDUCATION** **EDISON COLLEGE**

Continuing Education is a unique dimension of Edison College which provides a variety of credit-free programs for all interests and age groups. Understanding that learning is a life-long experience, Continuing Education provides activities and courses conducted without the pressure of tests, grades, or home assignments. These programs provide an informal and inexpensive means for self-improvement. Some programs are offered in the form of work shops, seminars or classes that may be anywhere from one day to several weeks in duration.

# Training

For more information contact:

**Edison College - Charlotte Campus  
Division of Continuing Education**

26300 Airport Road  
Punta Gorda, FL 33950  
T - (941) 637-5654  
F - (941) 637-3500  
[www.edison.edu/charlotte](http://www.edison.edu/charlotte)

**CONTINUING EDUCATION  
CHARLOTTE TECHNICAL CENTER (CTC)**

Charlotte Technical Center is a school within the Charlotte County Public School District and is accredited by the Council on Occupational Education, and is approved by the Veterans State Approval Agency. The Center is a specialized post-secondary institution designed primarily to provide job preparation and supplemental training to persons who have completed high school, to persons that have left high school before graduation and to dual enrollment high school students.

The Center provides a variety of occupational training programs including: automotive, business and office technology, carpentry, computer applications, construction trades, cosmetology, nursing, dental assisting, electrograph assisting, phlebotomy, electronics, drafting, early childhood education, culinary arts. New programs are always being considered at Charlotte Technical Center. If your organization has a training need not mentioned here, call the Center for information.

**CUSTOMIZED TRAINING**

- ❖ CTC is also an exceptional resource for customized training at an affordable rate. Training can take place either at the Center or at the business site and courses are catered to the needs of the business.
- ❖ All of the Center's programs are supported by an excellent library, a program for remedial studies and the GED, a program where a student can earn a high school diploma.

**DISTANCE LEARNING**

- ❖ CTC's Distance Learning Department currently offers ten Web CT-based online courses of study in automotive technology, business, culinary arts, electronics and health.
- ❖ Each course is taught online allowing students the flexibility to complete their course of study "any time, anywhere" at their convenience.

For more information contact:

**Charlotte Technical Center**

18300 Toledo Blade Boulevard  
Pt. Charlotte, FL 33948-3399  
T - (941) 255-7500  
F - (941) 255-7509  
<http://charlottetechcenter.ccps.k12.fl.us/index.html>

# Business Counseling

## **SCORE - Business Management Counseling**

SCORE (Service Corps of Retired Executives) is a service of the Government's Small Business Administration (SBA). Its sole purpose is to guide people who are needing advice about starting a business or managing an existing business. Its service is confidential and without charge, no matter how many counseling sessions are needed.

SCORE is funded, in part, through the Small Business Administration headquarters in Washington, D.C. Other sources for funding come from workshops and seminars and through support from the local business community. The local chapter of SCORE offers entrepreneur counselors with street-smart, down-to-earth business experience.

Once you have contacted SCORE for assistance, you will be sent a "Request for Counseling" form. A counselor will be assigned and will contact you to schedule a meeting.

For more information or to obtain a "Request for Counseling Form" contact:

### **SCORE**

1777 Tamiami Trail Suite 411

Port Charlotte, FL 33948

T - (941) 743-6179

[www.charlotte-florida.com/business/scorepg01.htm](http://www.charlotte-florida.com/business/scorepg01.htm)

## **CERTIFIED DEVELOPMENT CORPORATION (CDC)**

### **SOUTHWEST FLORIDA REGIONAL DEVELOPMENT CORPORATION**

The Southwest Florida Regional Development Corporation was approved by the Small Business Administration in May 1996, to operate as a "Certified Development Company" to promote the 504 loan program in Southwest Florida; with the overall goal of economic development in job creation and retention through assisting small businesses and the lending community to utilize government loan programs such as the SBA's 504 and 7(a) programs.

For more information contact::

### **Southwest Florida Regional Development Corporation**

13180 North Cleveland Avenue Suite 232

North Fort Myers, FL 33903

T - (239) 652-5588

F - (239) 652-9988

E-mail: [admin@srdcorp.org](mailto:admin@srdcorp.org)

[www.srdcorp.org](http://www.srdcorp.org)



# Technical Assistance

## FLORIDA MANUFACTURING EXTENSION PARTNERSHIP (Florida MEP)

The Florida MEP assists small to medium-sized manufacturers to transform their businesses into high performing, globally competitive enterprises. The Florida MEP is part of a nationwide network of more than 70 not-for-profit centers whose sole purpose is to provide small and medium-sized businesses with the help and solutions they need to succeed. There are Centers in all 50 states, linked together through the Department of Commerce's National Institute of Standards and Technology (NIST). This makes it possible for even the smallest firms in Florida to have access to more than 2,000 manufacturing and business specialists - including the staff of the Florida MEP and their specialized knowledge about doing business in Florida. Florida MEP can assist your business with the following matters:

- Plant layout
- Process improvements
- ISO 9000 / 14000
- Machinery automation / specification
- Computerization & manufacturing software
- Health & safety issues
- Environmental issues
- Marketing & business development
- Business planning
- Product development
- Technology transfer
- Supply chain management
- Energy audits

For information contact:

**Florida MEP**  
 1180 Celebration Blvd.  
 Celebration, FL 34747  
 T - (321) 939-4000  
 E-mail: [info@floridamep.org](mailto:info@floridamep.org)  
[www.floridamep.org](http://www.floridamep.org)

**David Ferguson**  
 1406 Aken Street  
 Port Charlotte, FL 33952  
 T - (941) 764-0273

## SPACE ALLIANCE TECHNOLOGY OUTREACH PROGRAM (SATOP)

The Technology Research and Development Authority (TRDA), Space Alliance Technology Outreach Program (SATOP), NASA and other leading organizations involved in the space program, provide fast technical assistance to all sizes and types of business **at no cost**. The goal of the program is to accelerate the transfer of 30 years of space program technology and expertise to the business sector; thereby making it easier for business to benefit from the collective resources of organizations allied through SATOP.

For information contact:

**Charlotte County Economic Development Office**  
 T - (941) 627-3023  
 E-Mail: [PureEconomics@charlottecountyfl.com](mailto:PureEconomics@charlottecountyfl.com)  
[www.spacetechsolutions.com](http://www.spacetechsolutions.com)



# Important Numbers

## CITY OF PUNTA GORDA:

### **Occupational License Department**

326 West Marion Avenue  
Punta Gorda, FL 33950  
T - (941) 575-3369  
F - (941) 575-3365  
[www.ci.punta-gorda.fl.us](http://www.ci.punta-gorda.fl.us)

### **Community Development & Code Compliance Department**

326 West Marion Avenue  
Punta Gorda, FL 33950  
T - (941) 575-3372  
F - (941) 575-3356

### **Punta Gorda Chamber of Commerce**

1200 W. Retta Esplanade Suite E43  
Punta Gorda, FL 33950  
T - (941) 639-3720  
F - (941) 639-7498  
E-mail: [chamber@puntagorda-chamber.com](mailto:chamber@puntagorda-chamber.com)  
[www.puntagorda-chamber.com](http://www.puntagorda-chamber.com)

## CHARLOTTE COUNTY:

### **Charlotte County Clerk's Office**

350 East Marion Avenue  
Punta, Gorda, FL 33950  
T - (941) 637-2199  
[www.co.charlotte.fl.us](http://www.co.charlotte.fl.us)

### **Community Development: Occupational License Department**

18400 Murdock Circle  
Pt. Charlotte, FL 33948  
T - (941) 743-1201  
F - (941) 743-1213  
[www.charlottecountyfl.com/BCS](http://www.charlottecountyfl.com/BCS)

### **Inspection Requests**

18400 Murdock Circle  
Pt. Charlotte, FL 33948  
T - (941) 743-1201  
[www.charlottecountyfl.com](http://www.charlottecountyfl.com)

### **Permitting**

18400 Murdock Circle  
Pt. Charlotte, FL 33948  
T - (941) 743-1201  
[www.charlottecountyfl.com](http://www.charlottecountyfl.com)

### **Tax Collector**

18500 Murdock Circle  
Pt. Charlotte, FL 33948  
T - (941) 743-1311  
F - (941) 743-1364  
[www.cctaxcol.com](http://www.cctaxcol.com)

### **Zoning**

18500 Murdock Circle Bldg. B  
Pt. Charlotte, FL 33948  
T - (941) 743-1221  
F - (941) 743-1228  
[www.charlottecountyfl.com](http://www.charlottecountyfl.com)

### **Career & Service Center of Charlotte County**

19500 Toledo Blade Boulevard  
Port Charlotte, FL 33948-2090  
T - (941) 235-5900  
[www.careerandservicecenter.org/charlotte.htm](http://www.careerandservicecenter.org/charlotte.htm)

### **Charlotte County Chamber of Commerce**

2702 Tamiami Trail  
Port Charlotte, FL 33952  
T - (941) 627-2222  
F - (941) 627-9730  
[www.charlottecountychamber.org](http://www.charlottecountychamber.org)

### **Charlotte Technical Center**

18300 Toledo Blade Boulevard  
Port Charlotte, FL 33948-3399  
E-Mail: [techcenter/techcenter.htm](mailto:techcenter/techcenter.htm)  
T - (941) 255-7500  
<http://charlottetechcenter.ccps.k12.fl.us>

### **Edison College**

Division of Continuing Education  
26300 Airport Road  
Punta Gorda, FL 33950  
T - (941) 637-5629  
F - (941) 637-3500  
[www.edison.edu](http://www.edison.edu)

### **Englewood Cape Haze Chamber of Commerce**

601 South Indiana Avenue  
Englewood, FL 34223  
T - (941) 474-5511  
E-mail: [info@englewoodchamber.com](mailto:info@englewoodchamber.com)  
[www.englewoodchamber.com](http://www.englewoodchamber.com)

# Important Numbers

## STATE OF FLORIDA:

### **Enterprise Florida, Inc.**

390 North Orange Avenue, Suite 1300  
Orlando, FL 32801  
E-Mail: [information@eflorida.com](mailto:information@eflorida.com)  
T - (407) 316-4600  
F - (407) 316-4599  
[www.eflorida.com](http://www.eflorida.com)

### **FL Dept of Business and Professional Regulation**

1940 North Monroe Street  
Tallahassee, FL 32399-0750  
T - (850) 487-1395  
F - (850) 922-1278  
[www.state.fl.us/dbpr](http://www.state.fl.us/dbpr)  
[www.myflorida.com](http://www.myflorida.com)

### **FL Dept of Environmental Protection South District Branch Office**

28000 Airport Road Unit A-10  
Punta Gorda, FL 33982  
T - (941) 575-5814  
F - (941) 575-5812

### **FL Dept of Environmental Protection South District Office**

2295 Victoria Avenue, Suite 364  
Fort Myers, FL 33901-3881  
T - (239) 332-6975  
F - (239) 332-6969  
[www.dep.state.fl.us](http://www.dep.state.fl.us)

### **Florida Small Business Development Centers**

**State Director's Office**  
401 East Chase Street Suite 100  
Pensacola, FL 32502  
T - 850-473-7800  
F - 850-473-7813  
[www.FloridaSBDC.com](http://www.FloridaSBDC.com)

### **FGCU Location**

12751 Westlinks Drive Bldg 3 #8  
Fort Myers, FL 33913  
T - 239-225-4220  
F - 239-225-4221  
<http://cli.fgcu.edu/sbdc>

### **FL Agency for Workforce Innovation**

T - (850) 921-6966 Workers' Compensation  
T - (850) 921-3299 Alien Labor Certification  
T - (850) 921-1119 Work Force Programs  
T - (866) 779-7356 Unemployment Compensation  
[www.floridajobs.org](http://www.floridajobs.org)

### **FL Department of Revenue**

2295 Victoria Avenue, Suite 270  
Fort Myers, FL 33901-3871  
T - (239) 338-2400  
T - (800) 352-3671  
<http://sun6.dms.state.fl.us/dor>  
[www.myflorida.com/dor](http://www.myflorida.com/dor)

### **FL Department of Revenue**

5050 West Tennessee Street  
Tallahassee, FL 32399-0100  
T - (850) 488-9750  
<http://sun6.dms.state.fl.us/dor/>  
[www.myflorida.com](http://www.myflorida.com)

### **FL Department of State Division of Corporations**

P.O. Box 6327  
Tallahassee, FL 32314  
T - (800) 755-5111 Information  
T - (850) 245-6052 Forms  
[www.dos.state.fl.us/doc/index.html](http://www.dos.state.fl.us/doc/index.html)  
[www.sunbiz.org](http://www.sunbiz.org)

### **FL Division of Workers' Compensation**

200 E. Gaines Street  
Tallahassee, FL 32399-4228  
Employer Help Line  
T - (850) 921-6966 or  
Bureau of Compliance  
T - (850) 488-2333  
[www.fldfs.com/wc](http://www.fldfs.com/wc)

### **Consumer Fraud Awareness, Inc.**

2050 Collier Avenue #101  
Fort Myers, FL 33901  
T - (239) 931-0550  
F - (239) 931-0559  
[www.consumerfraudawareness.org](http://www.consumerfraudawareness.org)

# Important Numbers

## **Florida Export Finance Corporation**

10400 N.W. 33 Street, Suite 200  
Miami, FL 33172-5902  
E-Mail: [fefc@gate.net](mailto:fefc@gate.net)  
T - (786) 845-0400  
F - (786) 845-0404  
[www.dos.state.fl.us/fefc/](http://www.dos.state.fl.us/fefc/)

## **Florida Gulf Coast University Small Business Development Center**

12751 Westlinks Drive  
Building III, Suite 8  
Fort Myers, FL 33913-8615  
T - (239) 225-4220  
F - (239) 225-4221  
<http://cli.fgcu.edu/sbdc>

## **FL Manufacturing Extension Partnership**

1406 Aken Street  
Port Charlotte, FL 33952  
David Ferguson  
T - (941) 764-0273  
[www.floridamep.org](http://www.floridamep.org)

## **Florida Power and Light**

P.O. Box 025576  
Miami, FL 33102  
T - (800) 375-2434  
[www.fpl.com](http://www.fpl.com)

## **SCORE**

1777 Tamiami Trail Suite 411  
Port Charlotte, FL 33948  
T - (941) 743-6179

## **SW FL Regional Development Corporation**

13180 North Cleveland Avenue Suite 232  
North Fort Myers, FL 33903  
T - (239) 652-5588  
F - (239) 652-9988  
E-mail: [admin@srdcorp.org](mailto:admin@srdcorp.org)  
[www.srdcorp.org](http://www.srdcorp.org)

## **Sprint Telephone**

T - (877) 877-8748  
[www.sprint.com](http://www.sprint.com)

## **EMBARQ**

T - 800-786-6272  
[www.embarq.com](http://www.embarq.com)

## **U.S. GOVERNMENT:**

### **U.S. Copyright Office**

**Library of Congress**  
101 Independence Avenue SE  
Washington, DC 20559-6000  
T - (202) 707-3000  
[www.copyright.gov](http://www.copyright.gov)

### **U.S. Department. of Commerce**

**Trade Information Center**  
1401 Constitution Avenue NW  
Washington, DC 20230  
T - (800) 872-8723  
F - (202) 482-4473  
[www.commerce.gov](http://www.commerce.gov)

### **U.S. Department of Labor**

#### **Occupational Safety and Health Administration Tampa Area Office**

5807 Breckenridge Parkway, Suite A  
Tampa, FL 33610-4249  
T - (813) 626-1177  
F - (813) 626-7015  
[www.osha.gov](http://www.osha.gov)

### **U.S. Internal Revenue Service**

1-800-829-4933  
[www.irs.gov](http://www.irs.gov)

### **U.S. Patent and Trademark Office**

#### **General Information Services Division**

PO Box 1450  
Alexandria, VA 22313-1450  
T - (571) 272-1000  
T - (800) 786-9199  
T - (571) 272-9950 (TTY)  
F - (571) 273-8300  
[www.uspto.gov](http://www.uspto.gov)

### **U.S. Postal Service**

130 E. Marion Avenue  
Punta Gorda, FL 33950  
T - 800-275-8777  
F - 941-639-7346  
[www.usps.gov](http://www.usps.gov)

# Appendix A

## LEGAL CONTACTS

**Note:** Legal Contacts listed below are members of the Charlotte County Chamber of Commerce or Englewood Area Chamber of Commerce.

**Byrski, Mary A., Attorney at Law**

230 Bal Harbor Blvd., Suite 113  
Punta Gorda, FL 33950  
T - (941) 833-9262  
F - (941) 833-9264  
E-mail: byrskilaw@aol.com

**Farr, Farr, Emerich, Sifrit,  
Hackett & Carr, PA**

99 Nesbit Street  
Punta Gorda, FL 33950  
Or  
P. O. Box 511447  
Punta Gorda, FL 33951-1447  
Or  
1160 South McCall Road  
Englewood, FL 34223  
T - (941) 639-1158  
F - (941) 639-0028  
www.farr.com

**Fischer, C. Michael, PA**

2800 Placida Rd., Suite 112  
Englewood, FL 34224  
T - (941) 697-7700  
F - (941) 697-8400  
E-mail: mfischer2100@earthlink.net

**Fritsch & Powell, LLC**

121 E. Marion Ave., Suite 111  
Punta Gorda, FL 33950  
T - (941) 205-2505  
F - (941) 205-2508  
E-mail: michael@fplawoffice.com  
www.fplawoffice.com

**Hevia, Jesus M. PA,**

126 E. Olympia Avenue  
Punta Gorda, FL 33950  
T – (941) 505-4334  
F – (941) 575-6670

**Icard, Merrill, Cullis, Timm, Furen  
& Ginsburg, PA**

1777 Tamiami Trail Suite 401  
Port Charlotte, FL 33948  
T – (941) 629-6319  
F – (941) 629-6324  
E-mail: dlevin@icardmerrill.com  
www.flwaterfront.com

**Kennett, Robert K., Attorney at  
Law**

2001 S McCall Road Suite D  
Englewood, FL 34223  
T – (941) 475-4418  
F – (941) 473-8518

**Kirshy, Russell T., Esquire, PA**

2886 Tamiami Trail Suite 9  
Port Charlotte, FL 33952  
T- (941) 255-5525  
F- (941) 255-3552  
E-mail: rtkirshy@aol.com

**Levin, Allen J., Attorney at Law**

3440 Conway Boulevard, Suite 1A  
Port Charlotte, FL 33952  
T - (941) 625-4189  
F - (941) 624-4633  
E-mail: levlaw@juno.com

# Appendix A

## LEGAL CONTACTS - Continued

**Note:** Legal Contacts listed below are members of the Charlotte County Chamber of Commerce or Englewood Area Chamber of Commerce.

### **Lucas Law Firm, P.A.**

17825 Murdock Circle Suite B  
Port Charlotte, FL 33948  
T – (941) 206-2120  
F – (941) 206-2122  
E-mail: [jlucas@lucaslawfirm.org](mailto:jlucas@lucaslawfirm.org)  
[www.lucaslawfirm.org](http://www.lucaslawfirm.org)

### **Marryott, Thomas D.**

126 E. Olympia Avenue Suite 404  
Punta Gorda, FL 33950  
T - (941) 639-8996  
F - (941) 639-3104

### **McKinley, Ittersagen, Gunderson & Berntsson, PA**

21175 Olean Blvd.  
Port Charlotte, FL 33952  
Or  
1861 Placida Road Suite 112  
Englewood, FL 34223  
T - (941) 627-1000 or  
T - (941) 474-7713  
F - (941) 255-0684 or  
F - (941) 474-8276  
E-mail: [pflynn@migblaw.com](mailto:pflynn@migblaw.com)  
[www.migblaw.com](http://www.migblaw.com)

### **Moore and Waksler, P.L.**

1107 W. Marion Ave., Suite 112  
Punta Gorda, FL 33950  
T - (941) 637-1955  
F - (941) 637-8485  
E-mail: [mwlaw@moore-wakslerlaw.com](mailto:mwlaw@moore-wakslerlaw.com)  
[www.moore-waksler.com](http://www.moore-waksler.com)

### **Oaks, David K., PA**

407 E. Marion Avenue, Suite 101  
Punta Gorda, FL 33950  
T - (941) 639-7627  
F - (941) 575-0242  
E-Mail: [doakeseq@comcast.net](mailto:doakeseq@comcast.net)

### **Olmsted & Wilson, PA**

17801 Murdock Circle, Suite A  
Port Charlotte, FL 33948  
T - (941) 624-2700  
F - (941) 624-5151  
E-mail:  
[dolmsted@olmstedwilsonlaw.com](mailto:dolmsted@olmstedwilsonlaw.com)  
[www.olmstedwilsonlaw.com](http://www.olmstedwilsonlaw.com)

### **Pavese Law Firm**

18501 Murdock Circle Suite 308  
Port Charlotte, FL 33948  
T- (941) 255-3095  
F – (941) 255-5905  
E-mail:  
[nealmontgomery@paveselaw.com](mailto:nealmontgomery@paveselaw.com)  
[ww.paveselaw.com](http://ww.paveselaw.com)

# Appendix A

## LEGAL CONTACTS - Continued

**Note:** Legal Contacts listed below are members of the Charlotte County Chamber of Commerce or Englewood Area Chamber of Commerce.

### **Schaffer, Robert J., Attorney at Law**

PO Box 511030  
Punta Gorda, FL 33951-1030  
T – (941) 575-0777  
F – (941) 575-7606  
E-mail: bocscutifer@aol.com

### **Sutliff, Sandra A., Attorney**

3440 Conway Blvd. Suite 1-C  
Port Charlotte, FL 33952  
T - (941) 743-0046  
F - (941) 743-4492  
E-mail: ssutliff@aol.com

### **Wilkins, Frohlich, PA**

18501 Murdock Circle, Suite 600  
Port Charlotte, FL 33948-1039  
T - (941) 625-0700  
F - (941) 625-9540  
E-Mail: wilkins@wilkinslaw.com

### **Wotitzky, Wotitzky, Ross, Goldman, Sturges & Tuttle PA**

18501 Murdock Circle Suite 501  
Port Charlotte, FL 33948  
T - (941) 639-2171  
F - (941) 639-8617  
www.wotitzkylaw.com

# Appendix B

## ACCOUNTANTS & CERTIFIED PUBLIC ACCOUNTANTS

**Note:** The Accountants and CPAs listed below are members of the Charlotte County Chamber of Commerce or the Englewood Area Chamber of Commerce.

### **Donald W. Ashley, CPA, PA**

366 E. Olympia Avenue  
Punta Gorda, FL 33950  
T - (941) 639-6600  
F - (941) 639-6115  
E-Mail: dashley@sunline.net

### **Koch & Company, CPAs, PA**

225 W Virginia Avenue  
Punta Gorda, FL 33950  
T - (941) 637-0544  
F - (941) 637-9693  
E-Mail: rex@rexkochcpa.com  
www.kochcpas.com

### **Daniel R. Daughtrey, CPA**

2960 S. McCall Road, Suite 210  
Englewood, FL 34224-8069  
T - (941) 473-1655

### **LoRicco, Crosland, Joiner & Company, PA**

3005 Caring Way, Suite A  
Port Charlotte, FL 33952  
T - (941) 629-1197  
F - (941) 629-5274  
www.cpaswf.com

### **Dees & Dees CPA, PA**

3440 Conway Boulevard, Suite 2C  
Port Charlotte, FL 33952  
P. O. Box 494457  
Port Charlotte, FL 33949-4457  
T - (941) 629-7595  
F - (941) 629-7596  
E-Mail: deescpa@daystar.net

### **Mark H. Knauf, CPA PA**

2230 S McCall Road  
Englewood, FL 34224  
T - (941) 474-5450  
F - (941) 473-3774  
E-mail: MHK2112@earthlink.net

### **Flischel, Townsend & Murtha, CPA, PA**

900 E. Pine Street, Suite 126  
Englewood, FL 34223-4437  
T - (941) 475-7937  
F - (941) 475-1120

### **Francis E. Hoban, Jr., CPA, PA**

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# Appendix B

## ACCOUNTANTS & CERTIFIED PUBLIC ACCOUNTANTS - Continued

Note: The Accountants and CPAs listed below are members of the Charlotte County Chamber of Commerce or the Englewood Area Chamber of Commerce.

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