## SECTION 00 41 00 BID FORM

## THE PROJECT AND THE PARTIES

## 1.01 TO:

A. Center Cass School District 66

District Office

699 Plainfield Road

Downers Grove, Illinois 60516

## 1.02 FOR:

- A. Project: Summer 2025 HVAC Upgrades
- B. Project Number: 243065

701 Plainfield Road

Downers Grove, Illinois 60516

We have examined the Contract Documents for the proposed Summer 2025 HVAC Upgrades as prepared by Wold Architects and Engineers, St. Paul, Minnesota, and the conditions affecting the work.

## 1.03 DATE: 09/03/2024 (BIDDER TO ENTER DATE)

## 1.04 SUBMITTED BY: (BIDDER TO ENTER NAME AND ADDRESS)

- A. Bidder's Full Name Helm Mechanical
  - 1. Address 900 Oakmont Ln. Suite 200
  - 2. City, State, Zip Westmont, IL 60559
  - 3. Telephone Number (630) 891-3400
  - 4. Fax Number (630) 891-3401

## 1.05 ACCEPTANCE

- A. Accompanying this proposal is a Bid Security for all work, required to be furnished by Contract Documents, the same being subject to forfeiture in the event of default by the undersigned.
- B. I agree to complete the Project, provided a contract is executed within 30 calendar days, by August 9, 2025.
- C. I understand the Owner reserves the right to reject any or all bids, and it is agreed that this bid may not be withdrawn for a period of thirty (30) days from the opening thereof.

## 1.06 BASE BID

A. The Bidder agrees to perform all work including General, Mechanical and Electrical Construction including an allowance sum of \$10,000 for the Base Bid Sum of:

The bidder agrees to perform all work including General, Mechanical and Electrical Construction including an allowance sum of \$10,000 for the Base Bid Sum of:

Dollars \$ 2, \ 32,000

## 1.07 ALTERNATES

A. The Bidder agrees to add to or deduct from the Base Bid Sum the following amounts to perform the alternate work described in Section 01 23 00, including all associated costs.

1. Alternate No. 1	- Electrical Wiring Replacement	
ADD thousand	Dollars \$ 149,600	

## 1.08 ADDENDA

A. The following Addenda have been received. The modifications to the Bid Documents noted below have been considered and all costs are included in the Bid Sum.

1.	Addendum(s) #_	1, 2, 3	9
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## 1.09 BID FORM SIGNATURE(S)

Helm Mechanical

(Bidder - print the full name of your firm) was hereunto affixed in the presence of:

Dave Schramm, Vice President

(Authorized signing officer, Title)

(Signature)



## Bid Bond

CONTRACTOR: Helm Mechanical 900 Oakmont Ln, Suite 200 Westmont, IL 60559 SURETY:

Fidelity & Deposit Company of Maryland 1299 Zurich Way Schaumburg, IL 60196

OWNER:

Center Cass School District 66 699 Plainfield Rd Downers Grover, Illinois 60516

BOND AMOUNT: Ten Percent of Bid (10% of Bid)

PROJECT: Center Cass SD 66 - Summer 2025 HVAC Upgrades

This document has important legal consequences. Consultation with an attorney is encouraged with respect to its completion or modification,

Any singular reference to Contractor, Surety, Owner or other party shall be considered plural where applicable,

Project Number, if any-

The Contractor and Suretv are bound to the owner in the amount set forth above- for the payment. of which the Contractor and Suretv bind themselves, their heirs, executors, administrators, successors and assigns. jointly and severally., as provided herein. I'c conditions of this Bond are such that if the Owner accepts the bid of the Contractor within the time specified in the bid documents, or within such time period as may be agreed to by the Owner and Contractor and the Contractor either (1) enters into a contract with the Owner in accordance with the terms of such bid, and gives such bond or bonds as may be specified in the bidding or Contract Documents. with a surety admitted in the jurisdiction of the Project and otherwise acceptable to the Owner, for the faithful performance of such Contract and for the prompt payment of labor and material furnished in the prosecution thereof, or (2) pays to the Owner the difference., not to exceed the amount of this Bond, between the amount specified in said bid and such larger amount for which the Owner may in good faith contract with another party to perform the work covered by said bid, then this obligation shall be null and void. otherwise to remain in full force with effect. The Surety hereby waives any notice of an agreement between the Owner and Contractor to extend the time in which the Owner may accept the bid-Waiver of notice by the Surety shall not apply to any extension exceeding sixty (60) days in the aggregate beyond the time for acceptance of bids specified in the bid documents. and the Owner and Contractor shall obtain the Surety's consent for an extension beyond sixty (60) day s

If this Bond is issued in connection with a subcontractor's bid to a Contractor, the term Contractor in this Bond shall be deemed to be Subcontractor arid the term owner shall be deemed to be Contractor.

When this Bond has been furnished to comply with a statutory or other legal requirement in the location of the Proany provision in this Bond conflicting with said statutory or legal requirement shall be deemed deleted hereform and provisions conforming to such statutory or other legal requirement shall be deemed incorporated herein When so furnished, the intent is that this Bond shall be construed as a statutory, bond and not as a common law bond-

Signed and sealed this

27th

day of August, 2024

Helm Mechanical

(Seal)

(Witness)

(Principal)

Vice President

Print Bourse

idelity & Deposit Company of Maryland

(Seal)

(Surety) Stephanis Amborn

Stephanie Amborn

(Title)

Attorney in Fact

## ZURICH AMERICAN INSURANCE COMPANY COLONIAL AMERICAN CASUALTY AND SURETY COMPANY FIDELITY AND DEPOSIT COMPANY OF MARYLAND POWER OF ATTORNEY

KNOW ALL MEN BY THESE PRESENTS: That the ZURICH AMERICAN INSURANCE COMPANY, a corporation of the State of New York, the COLONIAL AMERICAN CASUALTY AND SURETY COMPANY, a corporation of the State of Illinois, and the FIDELITY AND DEPOSIT COMPANY OF MARYLAND a corporation of the State of Illinois (herein collectively called the "Companies"), by Robert D. Murray, Vice President, in pursuance of authority granted by Article V, Section 8, of the By-Laws of said Companies, which are set forth on the reverse side hereof and are hereby certified to be in full force and effect on the date hereof, do hereby nominate, constitute, and appoint David L. TOWNSEND, Stephanic AMBORN, Judith L. ZIER, Julie A. TRESEMER, Robert W. SNYDER, Joseph J. CLINTON, III, Rebecca NORWOOD, Erica L. KIELTY of Rockford, Illinois, its true and lawful agent and Attorney-in-Fact, to make, execute, seal and deliver, for, and on its behalf as surety, and as its act and deed: any and all bonds and undertakings, and the execution of such bonds or undertakings in pursuance of these presents, shall be as binding upon said Companies, as fully and amply, to all intents and purposes, as if they had been duly executed and acknowledged by the regularly elected officers of the ZURICH AMERICAN INSURANCE COMPANY at its office in New York, New York., the regularly elected officers of the COLONIAL AMERICAN CASUALTY AND SURETY COMPANY at its office in Owings Mills, Maryland., and the regularly elected officers of the FIDELITY AND DEPOSIT COMPANY OF MARYLAND at its office in Owings Mills, Maryland., in their own proper persons.

The said Vice President does hereby certify that the extract set forth on the reverse side hereof is a true copy of Article V, Section 8, of the By-Laws of said Companies, and is now in force.

IN WITNESS WHEREOF, the said Vice-President has hereunto subscribed his/her names and affixed the Corporate Seals of the said ZURICH AMERICAN INSURANCE COMPANY, COLONIAL AMERICAN CASUALTY AND SURETY COMPANY, and FIDELITY AND DEPOSIT COMPANY OF MARYLAND, this 01st day of December, A.D. 2022.

SEAL SEAL SEAL

ZURICH AMERICAN INSURANCE COMPANY
COLONIAL AMERICAN CASUALTY AND SURETY COMPANY
FIDELITY AND DEPOSIT COMPANY OF MARYLAND

By: Robert D. Murray Vice President

By: Dawn E. Brown
Secretary

State of Maryland County of Baltimore

On this 01st day of December, A.D. 2022, before the subscriber, a Notary Public of the State of Maryland, duly commissioned and qualified, Robert D. Murray, Vice President and Dawn E. Brown, Secretary of the Companies, to me personally known to be the individuals and officers described in and who executed the preceding instrument, and acknowledged the execution of same, and being by me duly sworn, deposeth and saith, that he/she is the said officer of the Company aforesaid, and that the seals affixed to the preceding instrument are the Corporate Seals of said Companies, and that the said Corporate Seals and the signature as such officer were duly affixed and subscribed to the said instrument by the authority and direction of the said Corporations.

IN TESTIMONY WHEREOF, I have hereunto set my hand and affixed my Official Seal the day and year first above written

A COUNTY 13

Constance A. Dunn, Notary Public My Commission Expires: July 9, 2023

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## **EXTRACT FROM BY-LAWS OF THE COMPANIES**

"Article V, Section 8, Attorneys-in-Fact. The Chief Executive Officer, the President, or any Executive Vice President or Vice President may, by written instrument under the attested corporate seal, appoint attorneys-in-fact with authority to execute bonds, policies, recognizances, stipulations, undertakings, or other like instruments on behalf of the Company, and may authorize any officer or any such attorney-in-fact to affix the corporate seal thereto; and may with or without cause modify of revoke any such appointment or authority at any time."

## CERTIFICATE

I, the undersigned, Vice President of the ZURICH AMERICAN INSURANCE COMPANY, the COLONIAL AMERICAN CASUALTY AND SURETY COMPANY, and the FIDELITY AND DEPOSIT COMPANY OF MARYLAND, do hereby certify that the foregoing Power of Attorney is still in full force and effect on the date of this certificate; and I do further certify that Article V, Section 8, of the By-Laws of the Companies is still in force.

This Power of Attorney and Certificate may be signed by facsimile under and by authority of the following resolution of the Board of Directors of the ZURICH AMERICAN INSURANCE COMPANY at a meeting duly called and held on the 15th day of December 1998.

RESOLVED: "That the signature of the President or a Vice President and the attesting signature of a Secretary or an Assistant Secretary and the Seal of the Company may be affixed by facsimile on any Power of Attorney...Any such Power or any certificate thereof bearing such facsimile signature and seal shall be valid and binding on the Company."

This Power of Attorney and Certificate may be signed by facsimile under and by authority of the following resolution of the Board of Directors of the COLONIAL AMERICAN CASUALTY AND SURETY COMPANY at a meeting duly called and held on the 5th day of May, 1994, and the following resolution of the Board of Directors of the FIDELITY AND DEPOSIT COMPANY OF MARYLAND at a meeting duly called and held on the 10th day of May, 1990.

RESOLVED: "That the facsimile or mechanically reproduced seal of the company and facsimile or mechanically reproduced signature of any Vice-President, Secretary, or Assistant Secretary of the Company, whether made heretofore or hereafter, wherever appearing upon a certified copy of any power of attorney issued by the Company, shall be valid and binding upon the Company with the same force and effect as though manually affixed.

IN TESTIMONY WHEREOF, I have hereunto subscribed my name and affixed the corporate seals of the said Companies, this \_\_27th\_\_day of \_\_August \_\_\_\_\_\_, \_\_2024\_.







By:

Mary Jean Pethick Vice President

TO REPORT A CLAIM WITH REGARD TO A SURETY BOND, PLEASE SUBMIT A COMPLETE DESCRIPTION OF THE CLAIM INCLUDING THE PRINCIPAL ON THE BOND, THE BOND NUMBER, AND YOUR CONTACT INFORMATION TO:

Zurich Surety Claims 1299 Zurich Way Schaumburg, IL 60196-1056 Ph: 800-626-4577

If your jurisdiction allows for electronic reporting of surety claims, please submit to: <a href="mailto:reportsfclaims@zurichna.com">reportsfclaims@zurichna.com</a>

## **ATTORNEY-IN-FACT AFFIDAVIT**

STATE OF ILLINOIS

## **COUNTY OF STEPHENSON**

Before me, a Notary Public, personally came Stephanie Amborn known to me, and known to be the Attorney-in-Fact of Fidelity & Deposit Company of Maryland, which executed the attached bond as surety, who deposed and said that his signature and the corporate seal of said Fidelity & Deposit Company of Maryland were affixed by order and authority of said Company's Board of Directors, and that the execution of the attached bond is the free act and deed of Fidelity & Deposit Company of Maryland.

Given under my hand and seal this 27th day of August, 2024.

Notary Public

"OFFICIAL SEAL" LAURA J. KOON Notary Public, State of Illinois My Commission Expires 10-25-25



## Contractor's Qualification Statement

The Undersigned certifies under oath that the information provided herein	is true	and
sufficiently complete so as not to be misleading.		

Center Cass School District 66 SUBMITTED TO: 699 Plainfield Rd.

**ADDITIONS AND DELETIONS:** 

The author of this document has

added information needed for its

completion. The author may also

have revised the text of the original AIA standard form. An Additions and Deletions Report that notes added

information as well as revisions to the standard form text is available

reviewed. A vertical line in the left

margin of this document indicates where the author has added necessary information and where the author has added to or deleted from the original AIA text.

This document has important legal consequences. Consultation with an attorney is encouraged with respect

to its completion or modification. This form is approved and recommended by the American

Institute of Architects (AIA) and The Associated General Contractors of

America (AGC) for use in evaluating

the qualifications of contractors. No

endorsement of the submitting party

1

or verification of the information is

made by AIA or AGC.

from the author and should be

SUBMITTED BY:

Helm Mechanical

Downers Grove, IL 60516

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Dave Schramm

ADDRESS:

2279 Yellow Creek Road

Freeport IL 61032

## **PRINCIPAL OFFICE:**

	Corporation
[ ]	Partnership
[ ]	Individual
[ ]	Joint Venture
[ ]	Other

**NAME OF PROJECT:** (if applicable)

**TYPE OF WORK:** (file separate form for each Classification of Work)

General Construction **HVAC** Electrical Plumbing Other: (Specify)

Process Piping, Aquatic Piping, Steel Fabrication

## § 1 ORGANIZATION

§ 1.1 How many years has your organization been in business as a Contractor? 53 Years

§ 1.2 How many years has your organization been in business under its present business 53 Years name?

§ 1.2.1 Under what other or former names has your organization operated?

§ 1.3 If your organization is a corporation, answer the following:

§ 1.3.1 Date of incorporation:

1/2/90

§ 1.3.2 State of incorporation:

Illinois

§ 1.3.3 President's name:

Brian Helm

§ 1.3.4 Vice-president's name(s) Gary Statdfield

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§ 1.3.5 Secretary's name: Craig Buikema § 1.3.6 Treasurer's name: Craig Buikema

- § 1.4 If your organization is a partnership, answer the following:
  - § 1.4.1 Date of organization:
  - § 1.4.2 Type of partnership (if applicable):
  - § 1.4.3 Name(s) of general partner(s)
- § 1.5 If your organization is individually owned, answer the following:
  - § 1.5.1 Date of organization:
  - § 1.5.2 Name of owner:
- § 1.6 If the form of your organization is other than those listed above, describe it and name the principals:

§ 2 LICENSING

§ 2.1 List jurisdictions and trade categories in which your organization is legally qualified to do business, and indicate registration or license numbers, if applicable.

UA Plumbers, Pipefitters & International Association of Sheet Metal Workers

§ 2.2 List jurisdictions in which your organization's partnership or trade name is filed.

Continental United States

## § 3 EXPERIENCE

§ 3.1 List the categories of work that your organization normally performs with its own forces.

Plumbing, Heating, Sheet Metal, Process Piping

§ 3.2 Claims and Suits. (If the answer to any of the questions below is yes, please attach details.)

§ 3.2.1 Has your organization ever failed to complete any work awarded to it?

No

§ 3.2.2 Are there any judgments, claims, arbitration proceedings or suits pending or outstanding against your organization or its officers?

No

§ 3.2.3 Has your organization filed any law suits or requested arbitration with regard to construction contracts within the last five years?

No

§ 3.3 Within the last five years, has any officer or principal of your organization ever been an officer or principal of another organization when it failed to complete a construction contract? (If the answer is yes, please attach details.)

No

§ 3.4 On a separate sheet, list major construction projects your organization has in progress, giving the name of project, owner, architect, contract amount, percent complete and scheduled completion date. See Attached

§ 3.4.1 State total worth of work in progress and under contract:

## See Attached

§ 3.5 On a separate sheet, list the major projects your organization has completed in the past five years, giving the name of project, owner, architect, contract amount, date of completion and percentage of the cost of the work performed with your own forces.

## See Attached

§ 3.5.1 State average annual amount of construction work performed during the past five years:

## \$200,000,000

§ 3.6 On a separate sheet, list the construction experience and present commitments of the key individuals of your organization.

## See Attached

§ 4 REFERENCES

§ 4.1 Trade References:

Columbia Pipe & Supply

Ferguson Enterprises

Porter Pipe & Supply

815-773-1920

630-932-3865

630-725-8381

§ 4.2 Bank References:

BMO Harris Bank Patrick Weberpal 608-755-4229

§ 4.3 Surety:

§ 4.3.1 Name of bonding company:

Fidelity & Deposit of Maryland (Subsidiary of Zurich)

§ 4.3.2 Name and address of agent:

Williams Manny 555 S. Perryville Rockford IL 61125 Judy Zier - 815-226-3220

## § 5 FINANCING

§ 5.1 Financial Statement.

§ 5.1.1 Attach a financial statement, preferably audited, including your organization's latest balance sheet and income statement showing the following items: See Attached Financial Letter - we will submit a financial statement upon request.

Current Assets (e.g., cash, joint venture accounts, accounts receivable, notes receivable, accrued income, deposits, materials inventory and prepaid expenses);

Net Fixed Assets;

Other Assets;

Current Liabilities (e.g., accounts payable, notes payable, accrued expenses, provision for income taxes, advances, accrued salaries and accrued payroll taxes);

Other Liabilities (e.g., capital, capital stock, authorized and outstanding shares par values, earned surplus and retained earnings).

§ 5.1.2 Name and address of firm preparing attached financial statement, and date thereof:

§ 5.1.3 Is the attached financial statement for the identical organization named on page one?

§ 5.1.4 If not, explain the relationship and financial responsibility of the organization whose financial statement is provided (e.g., parent-subsidiary).

§ 5.2 Will the organization whose financial statement is attached act as guarantor of the contract for construction? Yes

§ 6 SIGNATURE

§ 6.1 Dated at this

day of

September, 2024

Name of Organization: Helm Mechanical

By:

Title:

§ 6.2

M being duly sworn deposes and says that the information provided herein is true and sufficiently complete so as not to be misleading.

Subscribed and sworn before me this 3

day of

September, 2024

Notary Public:

My Commission Expires: 10/05/2024

NOTARY PUBLIC - STATE OF ILLINOIS MY COMMISSION EXPIRES:10/05/24



# CONSTRUCTION PROJECTS REFERENCES

Heim Mechanical/Heim Service 2279 US 20 East Freeport IL 61032 Ph: 815-235-1955 Fax: 815-235-1940

MCCORMICK EVENT CENTER CHICAGO IL 2015-2017 PM: TONY DIVITO	MCCORMICK PLACE CUP CHICAGO IL 2016-7/31/18 PM: KEVIN CURRENT	CSL BEHRING B33/34 BRADLEY IL 2015-2017 PM: SHANE FLYNN	NW LAKE FOREST HOSPITAL LAKE FOREST, IL 2015-6/14/17 PM: RYAN BLACKMAN	NMH KISHWAUKEE HEALTH & FITNESS DEKALB, IL 2017-2018 PM: BILL HOFFMAN	OSF BED TOWER ROCKFORD, IL 2016-12/27/17 PM: MIKE WILLIAMS	HINES VA HOSPITAL HINES, IL 2016-2019 PM - TED MORA	NW UNIVERSITY KELLOGG SCHOOL OF MGMT CHICAGO, IL 2014-10/26/16 PM: TED MORA	ADVOCATE GOOD SHEPHERD HOSPITAL BED TOWER BARRINGTON, IL 2014-6/1/17 PM: KYLE DEWALL	MERCY HEALTH RIVERSIDE CAMPUS ROCKFORD, IL 2017-2019 PM: KYLE DEWALL
2116	2138	2114	2087	2171	2153	2175	2069	2010	2179
¢,	44	₹/•	44	₩.	t/s	₩	40	₩.	CONTR
3,360,000.00	10,500,000.00	27,000,000.00	15,200,000.00	3,200,000.00	13,500,000.00	12,650,000.00	43,000,000.00	30,000,000.00	\$ 60,000,000.00
CLARK/BULLEY JV MIKE MOORE 312-258-5459	CLARK/BULLEY JV Archie Gallup 617-548-0298	CSL BEHRING FL STEVE WROBLEWSKI 815-935-3153 steve.wroblewski@cslbehring.com	TURNER CONSTRUCTION PETE WOESTE 312-327-2784 pgwoeste@tcco.com	POWER CONSTRUCTION CHICAGO IL AARON MOE 312-596-6960	RINGLAND JOHNSON CHERRY VALLEY, IL BRENT JOHNSON 815-332-8620 bjohnson@ringland.com	WALSH CONSTRUCTION 929 W ADAMS STREET CHICAGO IL BRYAN MERRILL 312-563-5400	POWER CONSTRUCTION 2360 PALMER DRIVE SCHAUMBURG IL 60173 CHRIS ERICKSON 847-214-6758 cerickson@poec.net	M.A. MORTENSON 25 NW PAOINT BLVD 100 ELK GROVE VILLAGE IL 60007 TOM SIMON 847-472-8165 tom.simon@mortenson.com	OWNER/GC/CM M. A. MORTENSON 25 NW PAOINT BLVD 100 ELK GROVE VILLAGE IL 60007 JOE KRUEGER 847-472-8131
MOODY NOLAN ARCHITECTS CHICAGO IL 312-929-2516	AFFILIATED ENGINEERS INC CHICAGO IL 312-977-2800	FLUOR <u>com</u>	GENSLER CHICAGO IL 312-456-0123	PLUNKETT RAYSICH ARCHITECTS MILWAUKEE WI 414-359-3060	HKS INC CHICAGO IL 312-346-5899	HGA ARCHITECTS 414-278-8200	KPMB ARCHITECTS 322 KING STREET WEST TORONTO ONTARIO 416-977-5104	HOK ARCHITECTS 60 EST VAN BUREN STREET CHICAGO IL 60605 312-782-1000	ARCHITECT AECOM COLUMBUS OH CASEY OLDHAM 614-464-4500
PLUMBING	нуас	PIPE	HVAC	HVAC	HVAC & PLUMBING	HVAC & PLUMBING	HVAC & PLUMBING	HVAC	HVAC & PLUMBING
Yes	YES	No	N <sub>O</sub>	N <sub>0</sub>	Yes	Yes	N <sub>O</sub>	Yes	Bonded



## SCHOOL PROJECTS

Helm Mechanical 2279 US 20 East Freeport IL 61032 Ph: 815-235-1955 Fax: 815-235-1940

DIXON HIGH SCHOOL RENOVATION DIXON IL COMPLETE 2019	FLINN MIDDLE SCHOOL ROCKFORD, IL COMPLETE 2018	NEW TRIER WINNETKA & NORTHFIELD CAMPUS WINNETKA & NORTHFIELD IL COMPLETE 2017	NEW TRIER HIGH SCHOOL MECHANICAL RENOV 2190 WINNETKA COMPLETE 2017	NEW HINSDALE MIDDLE SCHOOL HINSDALE, IL 2017-2018	ROCK VALLEY COLLEGE HEALTH & SCIENCE ROCKFORD, IL COMPLETE 2017	PROJECT
2227	2232	2136	2190	2203	2131	IOB #
49	ક્ત	49	49	€9	<del>ca</del>	CONT
4,500,000.00	1,600,000.00	2,000,000.00	2,650,000.00	3,604,500.00	6,500,000.00	CONTRACT AMOUNT
Dixon CUSD #170 1335 Franklin Grove Road Dixon IL 61021	ROCKFORD CUSD #205 501 7TH STREET ROCKFORD IL 61104 815-966-3000	NEW TRIER CUSD #203 385 WINNETKA AVENUE WINNETKA IL 847-446-7000 STEVE LINK	NEW TRIER CUSD #203 385 WINNETKA AVENUE WINNETKA IL 847-446-7000 STEVE LINK	BULLEY & ANDREWS 1755 W ARMITAGE AVENUE CHICAGO IL 60622 JOE MURRAY 312-507-9138	JP CULLEN & SONS 330 EAST DELAVAN DRIVE JANESVILLE WI 53546 NEAL DAY 608-754-6601	OWNER/GC/CONSTRUCTION MGR
Green Associates 111 Deer Lake Road Davenport IA 528071 847-317-0852 George Reigle	LARSON & DARBY 4949 HARRISON AVENUE ROCKFORD IL 61108 815-633-1773 RAED SALEM rsalem@larsondarby.com	CASHMAN STAHLER GROUP 1910 S HIGHLAND AVENUE STE 310 LOMBARD IL 60148 630-889-8800 STEPHAN CASHMAN scashman@cashmanstahler.com	CASHMAN STAHLER GROUP 1910 S HIGHLAND AVENUE STE 310 LOMBARD IL 60148 630-889-8800 STEPHAN CASHMAN scashman@cashmanstahler.com	CORDOGAN CLARK & ASSOCIATES 960 RIDGEWAY AVENUE AURORA IL 60506	BLDD ARCHITECTS 833 WEST JACKSON STREET CHICAGO IL 60607	ARCHITECT
HVAC & PLBG	HVAC	HVAC	HVAC	HVAC	HVAC	JOB DESCRIPTION

8	Wold Architects and Engineers	Palatine Community Consolidated School District 15	Nicholas & Assoc.	F	Palatine	225 W Washington Street	VAC Improvements
	Haskell Architects & Engineeri	Ball Corporation		오 i	Findlay	12340 Township Road 99	
Ц	Eckennon Saunders Architects	I ne University of Unicago Medical Center  Rockford School District No. 205	Control Public School District #205	= =	Rockford	3520 Kishwaukee St	ades
1		Advocate Health Care		= =	Chicago	5700 South Maryland Avenue	o Domestic Hwy Convener
ū		Northwestern Memorial Healthcare		=	Chicago	676 N St Clair St	
		Schaumburg Park District		F	Schaumburg	1416 Payne Road	Jechanical Rooftop & Roof
	DLA Architects	Northbrook School District 28	Northbrook School District 28	F	Northbrook		HVAC Renovation
	STR Partners LLC	Skokie School District 68		= =	Skokie	9440 Kenton Avenue	enovations
		Father Flanagan's Boys Home Non-Profit		N	Boys Town	14100 Crawford St.	nsate receiver replacement
		Illinois Capital Development Board		=	Elgin	750 S. State Street	/ate Dietary
	STR Partners LLC	Rockford Park District  Beach Park Community Consolidated School District 3	Apex Facility Solutions Beach Park CUSD 3	= =	Beach Park	40667 N. Green Bay Rd.	U Replacement
	StudioGC Architecture & Interi	Park Ridge Niles School Dist 64		= =	Park Ridge	164 South Prospect Avenue	lition & Renovation BP #8
	Specialized Engineering Sol.	Commonspirit Health		E Z	Omaha	6901 N. 72nd Street	ement
\$	Wright Heerema Architect	Abbott Laboratories		F	Lake Bluff	100 Abbott Park Rd	
	FGM Architects-Engineers	Frankfort School District 157-C		=	Frankfort	22265 S. 80th Avenue	ovation of HVAC
	Holland Basham Architects	Commonsorit Health	MCL Construction	Z F	Lincoln	555 south 70th Street	lear Accelerator Upgrade
		Chicago Ridge School District		= ==	Chicago Ridge	6135 West 108th Street	ical Unit Replacement
	c c	Cambridge Public Schools		N	Cambridge	1003 Nelson Street	/AC Upgrades
	Morrissey Engineering Inc	Millard Public Schools	Millard Public Schools	Z F	Omaha	2828 S. 139th Street	Replacement-21442
	Eckenhoff Saunders Architects	AMITA Health Alexian Brothers Medical Center Elk Grove Village		= =	Elk Grove Village	800 Biesterfield Rd.	Renovation 22
		County of DuPage		F	Wheaton	421 N County Farm Rd	
	STR Partners LLC	SD #113A	Pepper Construction	= =	Lemont Hanover Park	410 McCarthy Road	Elec HDWRD
	Richard L Johnson Associates	Shirland Community School District #134		F	Shirland	8020 North Street	
<u> </u>		Barrington School District 220		<b>-</b> i	Barrington	205 W. County Line Road	Elementary Addition Reno
2 ₽		Rarrington School District 220	Penner Construction	= =	Barrington	224 Roslyn Road	Flementary Addition Reno
		Northwestern University		= =	Chicago	320 E. Superior Street	entralization Phase II
		Advocate Health Care		F	Park Ridge		d Surgery
		Creighton University		H i	Omaha	2616 Burt Street	ce Addition - New Construct
	Tower Pinkster Litus Associate	Clsego Public Schools	M.A. Mortenson Company	= =	DeKalh	1510 E Gurler Road	
	!	City of Colona		=	Colona	4356 Poppy Garden Road	ıstallation
		43rd and Calumet Phase 1 LP		F	Chicago	4308 S Calumet Ave	ecast, VRF & MUA
F	international aber - Datora	Waukegan School District		F i	Waukegan	1201 North Sheridan Road	nent
5 29	Power Engineers Collaborative	International Paper - Aurora	International Paper Company	= =	Aurora	2540 Prospect Ct	Room MAU
ı	Schemmer	Douglas County School District 0001		E N	Omaha	4215 South 20th Street	⇒ HVAC & Plumbing work
	000000000000000000000000000000000000000	The General Services Administration (GSA)		=	Chicago	600 West Madison	₹oom Project
	DI R Groun	Cather Flanagan Boys Home	Jacobs Project Management Company  MCL Construction	Z F	Boys Town	& Plumbing 13727 Flanagan Blvd	Construction HVAC & Plumbin
	Dewberry	Village of Romeoville		= =	Romeoville	1201 Kinzio Avenue	d Direction
	Legat Architects, Inc.	North Scott Community School District		⋝	Eldridge	104 south Third Avenue	
Ī	and consuming enough	Illinois Department of Human Serivces		= 7	Kankakee	100 E. Jeffery St.	grade
	ITO Consulting Orang	Komarek School District 94	Nicholas & Assoc	Z =	North Riverside	8940 West 24th Street 507 Nelson Street	ovations
		Chicago State University		=	Chicago	9501 S King Drive	/AC & Pool
₽		Board of Trustees of University of Illinois Chicago	University of Illinois	=	Chicago	1840 West Taylor Street MC533	t
	DLK Group	Sarpy County, State of Nebraska  IFF d/b/a Neal School Development LLC	Gilbane/BOWA a Joint Venture: c/o Gilbane Bldo. Co	= =	North Chicago	1905 Argonne Drive	New Construction
œ		Village of Bloomingdale		<u> </u>	Bloomingdale	299 Glen Ellyn Road	acility - Phase 2B
	Jackson Jackson	Douglas County School District #0001		Z	Omaha	4410 N <sub>a</sub> 36th Street	of Mech, Systems
	BCDM Architects	Cmana Public School FOX VALLEY DEVELOPERS	: vveitz Dekalb Mechanical	= =	Av:Aurora	504 S. Lincoln Ave, 301 Weston Ave, 323 Weston Avr Aurora	on, mechanical improvements
Ш		Proviso Township HS District 209		<u> </u>	Maywood		AC & Mechanical Work
		City of Chicago, Chicago Department of Aviation		=	Chicago	10000 W O'Hare Avenue	grades
	8	Rock River Reclamation Water District		F F	Rockford	3333 Kishwaukee Street	ng Renovation
5		Northwestern Memorial Healthcare	Power Construction	= =	Chicago	1780 W Peterson Avenue	mhing mhing carage
	DLR Group Inc	Douglas County School District 28-0059		E Z	Bennington	9809 N. 171st Street	ng, HVAC & Controls
	VHICE Dainp Architects	Fermi Reserch Alliance LLC	Barton Malow Builders LLC	= =	Batavia	Kirk and Pine Street	Ig
		General Services Administration		= =	Chicago	219 East Dearborn Street	Reprovation Project
		Facebook, Inc.	A.M	=	Dekalb	1510 E. Gurler Road	1
ַ פַ		University of lilinois at University of Illinois The Board of Trustees of the University of Illinois	F.H. Paschen SN Nielsen & Assc	<b>#</b> F	Chicago	1740 W. Taylor Street	Q
,	SVPA Architects Inc	City of Oskaloosa	Graphite Construction Group	- ≥	Oskaloosa	1521 Green Street	ion & Recreation Center Pool
≨	CENTER CONTRACTOR	Maine Township HS District 207		= ;	Park Ridge	2601 Dempster Street	
	Calvin I Hips Architects DO	Metropolitan Water Reclamation District of Greater Chicago	HC Construction Co.  Hernandez Consulting and Construction	Z F	Chicago	400 East 130th Street	s boiler removal
	BCDM/Alvine Engineering	Douglas County School District #001		Z M	Omaha	15800 Summit PA	lumbing and Sheet metal
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W8880 Co Rd X	720 S. Michigan Avenue 19 North May 131 S. Deathorn	1200 S 10th Street 14400 Davenport Street	1500 Applied Parkway 121 West 154th Street	22W600 Butterfield Road	676 N. St. Clair Street	1775 Dempster Street 776 Red Oak Lane	433 Vine Avenue 433 Vine Avenue	635 Ranger Street	841 WEst End Court	4021 Avenue B 840 Blackhawk Blvd	1425 W. Lincoln Highway	103 S. Prospect St.	160 Ridgewood Rd.	2700 Ogden Avenue	900 S. Elmhurst Rd.	801 W. Prospector PLace	1301 Spingdale Circle	508 N. Kenilworth Ave	1973 N. Kensington Lane	1401 Sheridan Rd. 8403 Lindenwood Rd.	421 N. County Farm Rd.	101 Dartmouth Street 600 Romona Road	7521 Lock Road	219 south Dearborn Street	4201 Medical Centre Drive	2700 South Maryland Avenue 4201 Medical Centre Drive	255 E. Chicago Avenue	520 S. Maple Avenue 4200 W. Main Street	14000 Boys Town Hospital Road	600 South 1st Street 444 South Main	2020 North Ruby Street	5500 Industral Park Blvd.	508 W. Angus Road	250 E. Superior Street	4519 S. 24th Street	3300 5th Avenue 809 460th Rd	4455 Weaver Pkwy	251 East Huron Street	1750 Lincoln Avenue	25 N. Winfield Dr.	944 Oakmont Drive	3908 Jones Street	1/25 W. Harrison Street 1/2340 County Rd. 99	400 Clinton Street	251 East Huron Street 6565 S. 136th Street	675 N. St. Clair Street	9669 Kenton Avenue 2727 Sycamore Road
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Lumer Construction Co. George Allen Construction Co. J.P. Cullen & Sons	McHugh Construction  Transport Construction	Clayco Sampson Construction Company	J.E. Dunn Construction Chicago Heights Construction Co.	Vision Construction & Consulting, Inc. IHC Construction Co.	EDDestro Construction Co.	Advocate Lutheran General Hospital	Pepper Construction Pepper Construction	Rockford Boys & Girls Club	Lamp Construction  Monarch Construction Company	Regional West South Beloit Sommunity Unit School District #320	Helm Citianice Services, Inc.	Trane	Riverside Brookfield High School SD 208	Lorig Construction Company	Pepper Construction	State of Nebraska - AS/State Bldg. Division	MEG Corp.	Bulley & Andrews	Nicholas & Assoc.	AbbVie Air Liquide USA TTC Accounts Payable	County of DuPage	Dekalb Mechanical Nicholas & Assoc.	Alberici Constructors -(Construction)	Skender Construction  Brock Construction, Inc.	Reed Construction	F.H. Paschen SN Nielsen & Assc Reed Construction	Power Construction	Bear Construction Community Unit School District 300	Mainelli Mechanical	Novozymes Blair, Inc. Christiansen Construction Company	Fresenius Kabi	ICON Mechanical	St. Patrick Catholic Church-Gretna	Skender Construction	Downs Electric	General Constructors, Inc.	Reed Construction	Skender Construction Skender Construction	Hausmann Construction, Inc.	Northwestem Memorial HealthCare	Community Unit School District #201	The Whiting-Turner Contracting Co	Reed Construction	Pointcore Construction	Clune Construction Company Millard Public Schools	LoDestro Construction Co.	Bulley & Andrews Power Construction
Citadel Enterprise Americas LLC BNSF Railway 4515 Kansas Ave Kansas City KS 66106 ConAcra	Chicago Hilton LLC 19 N May, LLC	Dollar General Corp Union Bank & Trust Company	Applied Underwriters Children's Habilitation Center	Consolidated school District 89	Hennold Endealorial Conference 004	Translath Educational Comments and	Township High School District 113 Township High School District 113	Boys and Girls Club of Rockford	Asington United Appointment of	Reginal West	Northern Illinois University		Riverside Brookfield Township High School District 208		Township High School District 214	State of Nebraska AS/State Building Div	Indian Prairie School District 204	Oak Park School District 97	Community Consolidated School District 54	AbbVie	County of DuPage	Wilmette Public School District 39  Board of Education- Wilmette Public School District 39	Alberici Constructors dba Midwest Foundation	Northwestern Memorial Healthcare U.S. General Services Administration	Northwestern Memorial Healthcare	The University of Chicago Medical Center  Northwestern Memorial Healthcare	Ann & Robert H Lurie Children's Hospital of Chicago	Rush University Medical Center Community Unit School District 300	Boys Town	Novozymes Blair Inc	Fresenius SE & CO, KGaA Healthcare Group	Clayco	St. Patrick Catholic Church - Gretna	Northwestern Memorial Healthcare	City of Furnithmey  Douglas County School District 001	City of Moline	Northwestern Memorial Healthcare	Northwestern Memorial Healthcare	Fremont High School	Northwestern Medicine	CUSD 201, Public School District	University of Nebraska Medical Center	RUSH University Medical Center Rall Composition	Ottawa YMCA	Northwestern Memorial Hospital Millard Public Schools	Northwestern Memorial Healthcare	Northshore University Healthcare System  Northwestern Memorial Healthcare
J.P. Cullen & Sons, Inc		Lamar Johnson Collaborative The Clark Enersen Partners	Studios Archit, Holland Basha													Alvine Engineering					Wight & Company	STR Partners LLC					Cannon Design								BCDM Architects				BVH Architecture	Rmerz Architects Grumman/Butkus Associates LTD.	Cashman Stahler Group, Inc.	Laskell Architects of Eligineer	Grumman Butkus	Legat Architects	HDR Architecture	Moody Nolan	Echenhoff Saunders
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r Renovation 11293-302 1120 S 101 St	Addition 684 Starr Road	ore & Shell Bldg. 114 N. 14	Hostler Repair Shop 5601 W.	200 S. 14	2301 Ge	501 Avenue H	nent OMA17576 5015 S <sub>+</sub> 3		8805 Tabler Rd.	2026 Fer		18ldg. 195 W. B		5201 S. I	ansion 3001 Kal	600 East	struction Services 74th & Cass	ition & Renovation 003041 000 6900 A street	nulti-story office reno. 1100 Bmadt Dr.	- Temporary Casino 600 N W	1401 Sh	Labor 11401 Mi	refresh 12300 W		Skid Upgrades 600 Sout	imal 21401 W	nt 1400 She	! Energy Plant- Phase 1 Remod 4101 Woolworth Avenue	nt lower mechanical room 5015 S. 3	erior Buildout 12308 New Ave.	- Center 10855 Vi	lenov Mech Piping 1087 & 1088 600 S. Hicks Road	n of all trades 4829 S. 1	alty Hospital 6100 S. L	3 & Utilities N7952 Hwy O	934 364th Rd.	Wites N8828 North Rd	and a second
101 St	⊤ Road	114 N. 145th Street	5601 W, 26th Street	200 S. 14th Street	2301 George Halas Dr. NW	nue H	5015 S, 33rd Street	4201 S. 130th Street	bier Rd.	2026 Fernwood Avenue	8403 Lindenwood Rd	195 W. Birch Street	ehl Road	5201 S. Harper Avenue	3001 Kalahari Blvd.	600 East Grand Avenue	ass	street	nadt Dr.	600 N Wabash Avenue	1401 Sheridan Road	11401 Military Road	12300 West Dodge Road	600 South 1st Street	600 South 1st Street	21401 West Center Road	1400 Sheridan Road	polworth Avenue	5015 S. 33rd Street	lew Ave	10855 Virgina Street	licks Road	4829 S. 114th Street	6100 S. Louise Avenue	lwy O	th Rd.	lorth Rd	record to the major of the same
Omaha NE	Plainwell MI	Omaha NE	Cicero IL	Omaha NE	Canton OH	Carter Lake IA	Omaha NE	Omaha NE	Morris IL	Red Oak IA	Rockford IL	Kankakee IL	Aurora IL	Chicago IL	lock	0	Omaha NE	Lincoln NE	Estates	Chicago IL	North Chicago IL	Omaha NE	Omaha NE	Blair NE			North Chicago IL		Omaha NE	Lemont IL		Rolling Meadows 1L	Omaha NE	Sioux Falls SD	Whitewater WI	Seward NE	Ixonia WI	· College
		IE Manzitto Builders, Inc.		IE J.E. Dunn Construction											^			IE McCarthy Building Companies		Gilbane Building Co.			IE Seese Construction							_ LoDestro Construction Co.					VI J.P. Cullen & Sons	IE Keen Project Solutions, LLC		Constitution transmission of the state of
Security National Bank		HP N 145th LLC				PVS Finishing, Division of Owen Industries	Smithfield Foods	McCarthy Building Companies	Air Products and Chemicals, Inc.	Fres-co System USA		Merck KGaA	Meta Platforms, Inc.	Beacon Capital Partners		Flyover Attractions INC		Nebraska Orthopaedic Center, PC	Plote Construction Inc.	Friedman Properties		Omaha Public Power District	Costco Wholesale	Novozymes Blair, Inc	Novozymes Blair, Inc	Intervet, Inc.	AbbVie Pharmaceutical	OMVA Medical Center	Smithfield Foods	OXBOW Midwest Calcinating	PMB Crown Point LLC	Demco, Inc.	T-Mobile USA, Inc.	Avera McKennan Hospital	WE Energies	Beck's	WE Energies	Management of the state of the
Alley Poyner Macchietto Archit		Alley Pyner Machhietto Arch						Clark & Enersen		Olsson Inc							Reach Archit/Clark & Enerson	Specialized Engineering Soluti	1919 Architects							DLR Group	Zachry					Dan Spata		BWBR Architects	Burns and McDonnell	Hafer	Burns and McDonnell	
	•	Morrissey E												WSP USA	,	Epstein Enc		Specialized		Environmer																		



BRIAN HELM, P.E.

CEO and President



## **EDUCATION**

**Georgia Tech University** 

M.S. Civil Engineering

**Duke University** 

B.S. Civil Engineering

## **WORK EXPERIENCE**

Helm 2001 - Present

CEO and President

Civil Constructors 1999 - 2001

Project Manager

**Kiewet Construction**Field Engineer / Job Superintendent

## **ASSOCIATIONS**

## **MCAA**

- President, 2019 2021
- Executive Committee
- Board Member
- Education Board, Past Chair
- Technology Board, Past Chair MCA Chicago
- President, 2018 2020
- Board Member

Local 597, JATC, Past Chair Local 23, JATC, Past Chair

Piping Council of Rockford

- Board and Past President

**Industrial Relations UA Council** 

**YPO Member** 

## **COMMUNITY ACTIVITIES**

## **Board of Directors**

- Northern Illinois Development Alliance
- Greater Freeport Partnership
- Rock Valley College Foundation
- YMCA of Northwest Illinois

## **LICENSES AND CERTIFICATIONS**

**Registered Professional Engineer - Illinois** 

**OSHA 30 Hour** 

Red Cross First Aid/CPR, EIT



## **CHRIS LORING**

Corporate Safety Director

Goodyear Area Manager



## **EDUCATION**

Illinois State University

B.S. Communications & Public Relations

## **WORK EXPERIENCE**

Helm Group
Corporate Safety Director

Honeywell
Senior HSE Specialist
Honeywell
Factory Supervisor

Goodyear

2007 - Present
2

## ADDITIONAL EDUCATION & CERTIFICATIONS

Mental Health First Aid Certification - National Council for Behavioral Health - March 2021 ASSE Certification to the Series 12020 Health and Safety Standard - April 2020 Defensive Driver Instructor Course - NSC - July 2019 NFPA Instructor Trainer Course – NFPA/MCAA - June 2019 OSHA 502: Update for Trainers in Construction - 2011, 2015, and April 2019 Trench Safety Conference - OSHA - April 2019 and November 2020 Part 46 - Annual Certification: MSHA - February 2019 Safety Directors Conference – MCAA – 2008, 2018, 2019, 2020, 2021 Competent Person for Fall Protection (Military) – MSA – May 2018 First Aid, CPR & AED Instructor - National Safety Council - August 2017 Construction Health and Safety Technician (CHST) – BCSP – September 2016 Safety Training Methods – National Safety Council – February 2016 Certified Trainer - Boom Lift and Scissor Lift - January 2016 Circuit Court of Stephenson County: Jury Service - December 2015 Lead Renovation Refresher: MidWest Certified Training, Inc. - April 2015 CPR/First Aid/AED Certified: Red Cross - March 2015 The Complete Guide to HR Management - October 2013 The Reid Technique of Interviewing and Interrogation – January 2013 Fall Prevention and Protection Inspection Training – November 2012 Health Hazards in Construction: OSHA - August 2011 Lead Safety for Renovation: Occupational Training and Supply Inc. - April 2010 Powered Industrial Truck Train the Trainer: National Safety Council - January 2010 Safety and Risk Management Academy: Iowa State University - September 2009 Crane & Hoist Train the Trainer: National Safety Council - January 2008 OSHA 500: OSHA Trainer Course for Construction - September 2007 OSHA 510: OSHA Standards for Construction Industry - August 2007 OSHA VPP Star Certification: Honeywell Control Products - March 2006 AIHA: Fundamentals of Industrial Hygiene – July 2005 OSHA 511: Standards for General Industry – February 2004 Six Sigma Green Belt: Honeywell Control Products - June 2002

## **ASSOCIATIONS**

National Council for Behavior Health – MHFA Certified
American Society of Inspectors of Plumbing and Sanitary Engineers – Series 12020 Certified
Board of Certified Safety Professionals – Member
United Academy – Certified Training Instructor
OSHA Training Institute Education Center – Training Instructor
Sheet Metal and Air Conditioning Contractors National Association (SMACNA)
Mechanical Contractors Association of America (MCAA) - Member
American Society of Safety Engineers (ASSE) – Member
National Safety Council – Member/Certified Training Instructor
Society for Human Resources Management - Member
Northern Illinois Building Contractors Association (NIBCA) - Member
Stephenson County Health Department – Emergency Response Volunteer
Freeport YMCA, Little League – Volunteer/Youth Flag Football, Soccer, Baseball Coach
Boy Scouts of America – Merit Badge Counselor
United States Junior Chamber of Commerce (JAYCEES) – Freeport Chapter - Past President
Public Relations Student Society of America – Illinois State University – Past Board Member



**David Schramm** 

Vice President



## **EDUCATION**

Northern Illinois University B.S. Mechanical Engineering

## **ASSOCIATIONS**

MCAA National MCA - Chicago

## **WORK EXPERIENCE**

Helm Mechanical Vice President	April 2020 - Present
Amber Mechanical Contractors Engineering Mgr. / Business Development	2013-2020
F.E. Moran Project Executive	*2011-2013
International Piping Systems Project Manager	2009-2011*
Metro Design Associates Mechanical Engineer	2007 – 2009
RECENT PROJECT EXPERIENCE	
The Hayden West Loop	Chicago, IL
Lathrop Homes Phase 1	Chicago, IL
Fannie Emmanuel Senior Housing	Chicago, IL

## LICENSES/CERTIFICATIONS

**Licensed Professional Engineer** 

- IL # 062.067338

**LEED Accredited Professional** 

\*Merger – International Piping Systems

and F.E. Moran June 2011



Helm Mechanical Helm Service 2279 Yellow Creek Road PO Box 690 Freeport, IL 61032

> Tel 815 235 1955 Fax 815 235 1940

## To Whom It May Concern:

It is our understanding that certain financial information has been requested about Helm Mechanical/Helm Service as part of the bid package / prequalification information we are preparing for your organization. Helm Mechanical/Helm Service. is a wholly owned subsidiary of the Helm Group, Inc. and represents approximately 75% of the revenue of the Helm Group, Inc.

An audited consolidated financial statement is prepared for the Helm Group and subsidiaries after each calendar year end. A separate audited financial statement is not prepared for Helm Mechanical/Helm Service as a stand alone entity. Below are some financial highlights for the past few years.

## Helm Mechanical / Helm Service. (alone):

2015 Revenue	\$185,782,982
2016 Revenue	\$225,669,427
2017 Revenue	\$252,714,184
2018 Revenue	\$233,858,778
2019 Revenue	\$203,327,455
2020 Revenue	\$251,145,004
2021 Revenue	\$297,436,639

## Helm Group, Inc. (total consolidated, all subsidiaries):

2015 Revenue	\$250,119,498
2016 Revenue	\$294,072,741
2017 Revenue	\$306,358,643
2018 Revenue	\$303,914,530
2019 Revenue	\$269,555,128
2020 Revenue	\$343,113,270
2021 Revenue	\$389,035,371

## Helm Group, Inc. (total consolidated, all subsidiaries):

## As of December 31, 2021:

Total assets	\$144,097,955
Total current assets	\$109,240,499
Total liabilities	\$ 72,802,258
Total current liabilities	\$ 65,825,882
Total equity	\$ 71,295,697

Available line of credit with bank \$ 30,000,000

Specific financial questions and reference requests can be directed to Craig Buikema, CFO, at 815-297-8690.

Thank you,

HELM MECHANICAL / HELM SERVICE 2279 Yellow Creek Rd. Freeport, IL 61032

## Cottingham & Butler

September 28, 2023

To Whom It May Concern

RE: Historical NCCI Experience Modification Factors

This letter is to confirm the Workers Compensation experience modification history for Helm Group/Civil Constructors, Inc./Mechanical, Inc. is as follows:

04/01/2002	0.55
04/01/2003	0.59
04/01/2004	0.57
06/25/2005	0.69
06/25/2006	0.70
06/25/2007	0.78
10/01/2008	0.76
10/01/2009	0.75
10/01/2010	0.61
10/01/2011	0.60
10/01/2012	0.52
10/01/2013	0.53
10/01/2014	0.47
10/01/2015	0.46
10/01/2016	0.48
10/01/2017	0.52
10/01/2018	0.48
10/01/2019	0.48
10/01/2020	0.52
10/01/2021	0.62
10/01/2022	0.62
10/01/2023	0.66

Please feel free to contact me if you have questions or require any further detail.

Sincerely,

Robert P. Wuebker, CPCU, CIC, CRM, AU, AAI Account Executive, Risk Management Practice C&B Insurance

563-587-5306

ab/rpw

