

FY2021

PROFESSIONAL SERVICES PROPOSAL SUBMISSION CHECKLIST

**Deadline Date/Time: Thursday, February 4, 2021 5:00 p.m.**

Professional Services Applicant:

For reference:

- A- **FY2021 CPA Professional Services Proposal Submission Checklist**
- B- **FY2021 CPA Direct Purchase of Service Information**
- C- **FY2021 CPA DAAA Professional Services Request for Bids**
- D- **FY2021 CPA DAAA Professional Services Bids -Submission Instructions**
- E- **FY2021 Focal Points in Dallas County**

- 1. CPA Direct Purchase of Service Application
- 2. Texas State Board of Public Accountancy license
- 3. Certificate of Liability Insurance
- 4. Workers' Compensation Form
- 5. DAAA CPA Professional Services Contract
- 6. W-9 Taxpayer Identification Number
- 7. Debarment Certification
- 8. Standard Assurances
- 9. Data Use Agreement- with Attachment 1. Subcontractor Agreement Form
- 10. Lobbying Certification
- 11. Non-Conflict of Interest
- 12. Child Support Certification (Required of for-profit Services Contractors only)
- 13. Three References Form
- 14. Assurances Confirmation of Receipt and Review
- Certificate of Filing for the Texas Business Certification- Office of the Secretary of State that includes the Seal of approval
- The Certificate of Fact with the secretary of State that includes the seal of approval.

**Please submit original and one copy to:**

Sandra Luz/Francheska Dixon, Contracts Dept. [sluz@ccadvance.org](mailto:sluz@ccadvance.org) [fdixon@ccadvance.org](mailto:fdixon@ccadvance.org)  
Dallas Area Agency on Aging  
Community Council of Greater Dallas  
1341 W. Mockingbird Ln., Suite 1000W  
Dallas, TX 75247

**Must be delivered by e-mail before deadline, after documents are reviewed you will be advised to send it by mail, (ask for postal received receipt). **When submitting the listed attachments, Keep in the order of the above checklist.****