

Assumption Agreement and Amendment of Contract
City of Waukesha – Catalis Tax & CAMA, Inc.

This Assumption Agreement and Amendment of Contract, referred to herein as the Agreement, is entered into by and between the City of Waukesha, 201 Delafield Street, Waukesha, Wisconsin 53188, referred to herein as the City; and Catalis Tax & CAMA, Inc., 3025 Windward Plaza, Suite 200, Alpharetta, Georgia 30005, referred to herein as Catalis. Together, the City and Catalis are referred to herein as the Parties.

Recitals

On January 4, 2022, the City entered into a Master Software License Agreement, referred to herein as the License Agreement, with Patriot Properties, Inc., for provision of commercial property tax assessment services.

Subsequent to the execution of the License Agreement, Patriot Properties was acquired by Catalis and no longer exists as a separate legal entity. As part of that acquisition, Catalis has assumed Patriot's License Agreement with the City and has continued to provide property tax assessment services pursuant to the License Agreement.

The City wishes to add residential property tax assessment services, to the services provided under the License Agreement. Catalis is willing to do so.

Now, therefore, in consideration of the mutual promises of the Parties herein, the Parties agree as follows:

1. **Assumption of License Agreement.** Catalis assumes the License Agreement as the Licensor therein, and all of the rights, duties, obligations, and responsibilities of the Licensor.
2. **Amendment of License Agreement.** The License Agreement is amended to add residential valuation, as described in the Change Request attached to this Agreement as Exhibit 1 and incorporated herein by reference.
3. **Conflicts.** If there are any conflicts between the terms of this Agreement and the terms of the License Agreement or Exhibit 1, the terms of this Agreement shall control, and the License Agreement and Exhibit 1 shall be deemed amended to comply.

City of Waukesha

By Shawn N. Reilly, Mayor
Date: _____

Sara Spencer, Interim Clerk-Treasurer
Date: _____

Catalis Tax & CAMA, Inc.



(sign above, print name and title below)
Name: Steven Ashbacher
Title: Executive Vice President
Date: April 4, 2024

Accept



CATALIS 

Change Request:

Prepared For: Waukesha, WI

Prepared By:
Jason Bastow
jbastow@catalisgov.com | 781-476-2008

Accept



Date:	2024-04-04
Product:	CoreLogic Marshall and Swift
Project Type:	Change Request
Request ID#:	00423589
Title:	Addition of Residential Valuation
Requested By:	Sam Walker, City Assessor
Phone Number:	262-524-3517
Email:	swalker@waukesha-wi.gov

▼ Description

Adding Residential M&S. Currently only use Commercial M&S

▼ Requirements

VPN Access to Server

Time with Assessor to Develop the Tables

▼ Schedule

- Table Development: Late Q3 - Q4, 2024
- Training, Testing, and Deployment: Mid to Late Q4, 2024
- Go-Live With Residential CoreLogic M&S: 12/31/2024
- Post Go-Live Remediation: Q1, 2025



Fees

Billable Charges for the services listed above:

One-Time Fixed Charges SUBTOTAL \$4,000.00

Description	Item	Quantity	Price
Professional Services [Implementation of Residential Module]	\$4,000.00	1 Project	\$4,000.00

Recurring Fixed Charges YEARLY \$1,500.00

Description	Item	Quantity	Price
[M&S Annual Fee] [Addition of Residential Module]	\$1,500.00	1 Module	\$1,500.00 / year

Recurring Variable Charges YEARLY \$7,273.76

Description	Item	Quantity	Price
[M&S Annual Fee] [Estimation on Self-Reported Parcel Buildings] 2025 Rates = \$0.36/Building	\$7,273.76	1 Year	\$7,273.76 / year

Total One Off	\$4,000.00
Total Recurring	\$8,773.76 / year
Total Due Today	\$12,773.76

Accept



Accept and Sign

Our team is ready to kick off this Change Request for !

If you have any questions, please reach out to me (Jason Bastow) at jbastow@catalisgov.com!

Address: 201 Delafield Street, Waukesha, Wisconsin 53188

Catalis Tax and CAMA, Inc. Address: 3025 Windward Plaza, Suite 200, Alpharetta GA 30005

Accept