

BUSINESS ASSISTANCE GUIDE

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

Charlotte County

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 April 2010

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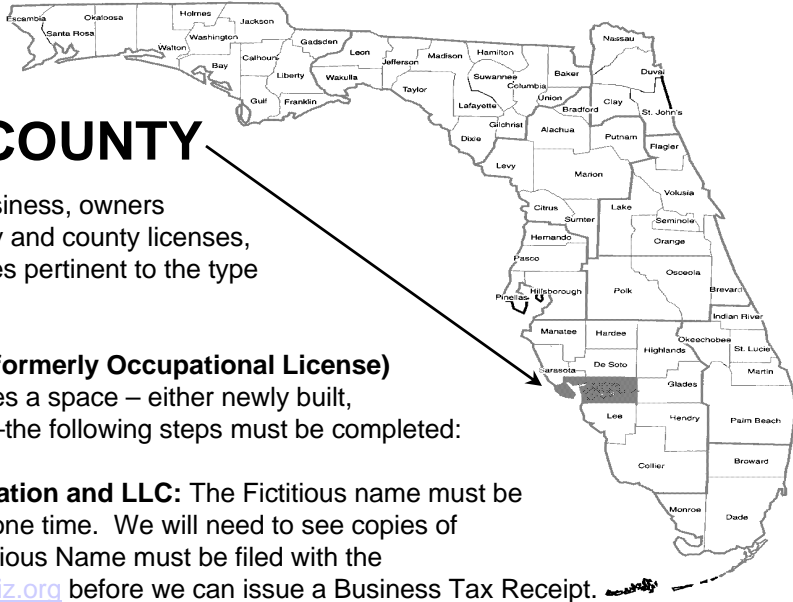
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Note: T = Telephone
F = Facsimile

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**



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.

BUSINESS TAX RECEIPT (formerly Occupational License)

Before your business occupies a space – either newly built, retrofitted, or move-in ready –the following steps must be completed:

- 1. Fictitious Name, Incorporation and LLC:** The Fictitious name must be advertised in the local news one time. We will need to see copies of the advertisement. The Fictitious Name must be filed with the State of Florida at www.sunbiz.org before we can issue a Business Tax Receipt.
- 2. Zoning Department:** The location of the business and the use proposed must be approved. A **Change of Occupancy Form** must be completed. The form is available at the Charlotte County Zoning Department, located at 18500 Murdock Circle, Building (B) room 105 or online at <http://www.charlottecountyfl.com/BCS/forms.asp#Zoning>. Once the form is completed and submitted, inspection visits for plumbing, electric, fire and zoning will be scheduled and the cost of inspection is \$101. If property is on septic, you must obtain an authorization form from the Health Department in Building (B) room 203, and pay a fee ranging between \$50 and \$55, depending on the system. A Certificate of Occupancy will be issued by the Building Construction Services Department.
- 3. IRS or Social Security Number (last four digits):** A Business Tax Receipt may NOT be issued without one. Go to www.irs.gov for a Federal Tax ID Number.
- 4. Business Tax Receipt:** The Tax Collector will issue a Business Tax Receipt for a commercial business location after all the above steps are completed. After a Business Tax Receipt is issued, it may be renewed online at www.ctaxcol.com.

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 tax receipt, contact the Building Construction Services Department of Charlotte County.

Charlotte County Building Construction Services Department

18400 Murdock Circle
Port Charlotte, FL 33948
T - (941) 743-1201 F - (941) 743-1220

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

pgclerk@ci.punta-gorda.fl.us

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 -or- www.dos.state.fl.us

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.dbpr.state.fl.us -or- 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 -or- www.dos.state.fl.us

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://www.myflorida.com> -or- 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 -or- www.dos.state.fl.us

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.myfloridacfo.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

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

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

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 now only applies to leases applied to government-owned real property and notes secured by a mortgage on Florida real property.
- Properties 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

<http://www.myflorida.com/dor> - 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/uct48ehb.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

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) 743-1350

F - (941) 743-1364

www.cctaxcol.com

INTERNET JOB SEARCHING SITES

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

Career and Service Center of Charlotte County

1032 Tamiami Trail, Unit 9

Port Charlotte, FL 33953

T - (941) 235-5900

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
941-487-5000
 - **IMPAC University**, Punta Gorda
www.impacu.edu
941-639-7512
 - **Edison College**, Punta Gorda and Fort Myers
www.edison.edu
941-637-5629
 - **State College of Florida Manatee-Sarasota**
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.FloridaEDO.com 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

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

CHARLOTTE COUNTY INCENTIVE DEVELOPMENT PROGRAM

The Charlotte County Economic Development Incentive 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-wage value added 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 below) and meets certain basic Program requirements is eligible to participate in the Program. Program participants are eligible to receive both employment and capital incentives following approval of their Program Application.

Employment Incentives

Employment Incentives are linked to Targeted Industries, as identified by Charlotte County, to include those industries identified by Enterprise Florida, Inc. as a Qualified Target Industry or members of the aviation or marine industries. (Ordinance 2007-055) A business must have the ability to generate and maintain at least ten (10) "Quality Jobs" within Charlotte County and must meet the fifty-one (51) percent export sales requirement, unless other measures are met as identified in the Ordinance. 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.

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 Charlotte County Average Annual Wage, as established by the State of Florida Incentives Average Wage Requirements, effective January 1, 2008, the average annual wage for Charlotte County is \$31,060, and are as follows:

1. \$ 1,000 for Quality Jobs with salaries equal to or greater than the Florida Wage plus fifteen percent (15%), \$35,719.
2. \$ 1,500 for Quality Jobs with salaries equal to or greater than the Florida Wage plus fifty percent (50%), \$46,590.
3. \$ 2,000 for Quality Jobs with salaries equal to or greater than the Florida Wage plus one hundred percent (100%), \$62,120.

Enterprise Florida, Inc. has identified certain target industries in its marketing and sales strategy. The list of qualifying industries is available at www.eflora.com.

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 per \$100,000 of real property value added to the County tax roll, during the business's 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 under Title XIV, Florida Statutes, during the business's 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. Prior to the participant's receipt of incentives, the County and the participant shall enter into a program agreement that is approved by the Board of County Commissioners.

Application Process

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



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 Only businesses serving multi-state and/or international markets are eligible. Business must be able to locate in other states.	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

**ENTERPRISE FLORIDA Inc.
PARTNERSHIP INFORMATION**

BUSINESS INCENTIVES

	ECONOMIC DEVELOPMENT TRANSPORTATION FUND (Road Fund)	QUALIFIED DEFENSE CONTRACTOR TAX REFUND PROGRAM (QDC)
TYPE OF INCENTIVE	GRANT	TAX REFUND
<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 Only businesses serving multi-state and/or international markets are eligible. Business must be able to locate in other states.	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**

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
201 Alhambra Circle, Suite 610
Coral Gables FL 33134
Phone: (305) 808-3660
Fax: (305) 808-3586
www.eflorida.com

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

T - (305) 371-7678

F - (305) 347-4843

www.miamidade.gov/portofmiami/

Port Everglades

Distance from Charlotte Co.: est. 210 Miles

Contact:

Port Everglades Business Office

109 Royal Park Drive #2C

Fort Lauderdale, FL 33309

E-Mail: jt@travel411.com

T - (954) 969-0069

www.porteverglades.org

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

T - (941) 722-6621

F - (941) 729-1463

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@tampaport.com

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

F - (813) 905-5109

www.tampaport.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

Miami International Airport

Distance from Charlotte Co.: est. 160 Miles

Contact: José Abreu

Miami-Dade County Aviation Department

P.O. Box 025504

Miami, FL 33102-5504

T - (305) 876-7077

F - (305) 876-0948

www.miami-airport.com

Sarasota Bradenton International Airport

Distance from Charlotte Co.: est. 46 Miles

Contact:

Sarasota Manatee Airport Authority

6000 Airport Circle

Sarasota, FL 34243

T - (941) 359-5200

www.srq-airport.com

Tampa International Airport

Distance from Charlotte Co.: est. 46 Miles

Contact:

Hillsborough County Aviation Authority

P.O. Box 22287

Tampa, FL 33607

T - (813) 870-8700

F - (813) 875-6670

www.tampairport.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. 33rd Street, Suite 200

Miami, FL 33172-5902

E-Mail: fefc@gate.net

T - (786) 845-0400

F - (786) 845-0404

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

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: Sandra.Campbell@mail.doc.gov

T – (727) 893-3738

F – (727) 893-3839

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, 7th 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

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

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

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.FloridaEDO.com

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: FloridaEDO@charlottetef.com

T - (941) 627-3023

T - (800) 729-5836

F - (941) 627-6314

www.FloridaEDO.com

ENTERPRISE FLORIDA

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)

800 N. Magnolia Ave
Suite 1100
Orlando, FL 32803
T - (407) 956-5600
F - (407) 956-5599

EFI - Tallahassee

325 John Knox Road
Atrium Building Suite 201
Tallahassee, FL 32303
T - (850) 298-6620
F - (850) 298-6659

EFI - Miami

201 Alhambra Circle
Suite 610
Coral Gables, FL 33134
T - (305) 808-3600
F - (305) 808-3586

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

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) 441-0591
www.eflorida.com/canada

GERMANY

Alexander Bothmann
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

CHINA

Mr. Kai Yang
Enterprise Florida China Liason Office
#1206 West Tower, 12th 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

Note: T = Telephone
F = Facsimile

ENTERPRISE FLORIDA

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

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

SPAIN

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

UNITED KINGDOM

Daniel Callaghan, Director
 Enterprise Florida UK & Ireland Office
 146 Fleet Street
 EC4A 2BU
 London
 United Kingdom
 T - 011 +44 (20) 7822 0710
 F - 011 +44 (20) 7353 1081
www.eflorida.com/uk

ISRAEL

Nurit Gazit
 Enterprise Florida, Inc.
 c/o Orange Blossom Ventures Ltd.
 Amot Mishpat House
 King Shaul Blvd.
 Tel Aviv, 64744, Israel
 T - 011 + 972 (3) 696-6479
 F - 011 +972 (3) 696-4000
www.eflorida.com/israel

SOUTH AFRICA

Tongila Manly, Managing Director
 Enterprise Florida Africa Office
 23 Wellington Rd Parktown
 Johannesburg, South Africa 2193
 T - 011 +27 (11) 480-4889
 F - 011 +27 (11) 476-6740

TAIWAN

Wennie Chen
 Enterprise Florida, Inc.
 Taipei World Trade Center, Suite #7E-01 5
 Hsin Yi Road, Sec. 5
 Taipei, Taiwan
 T - 011 +886 (2) 2758-5181
 F - 011 +886 (2) 2723-5892
www.eflorida.com/taiwan

VENEZUELA

Carolina Stone Herrera
 Enterprise Florida Venezuela Office
 2da. Avenida de Campo Alegre
 Torre Credival, Piso 6
 Campo Alegre, Caracas 1010-A Venezuela
 T - 011 (58-414) 304-7588

Note: T = Telephone
 F = Facsimile



ENTERPRISE FLORIDA

INTERNATIONAL FIELD OFFICES

Enterprise Florida, Inc.
Coral Gables International Field Office
201 Alhambra Circle, Suite 610
Coral Gables, FL 33134
T - (305) 808-3600
F - (305) 808-3586

John Diep
Enterprise Florida, Inc.
Asia Specialist Enterprise Florida, Inc.
310 Evernia Street
West Palm Beach, FL 33401
Tel.: 561-832-8339
Fax: 561-835-1160

Enterprise Florida, Inc.
Orlando International Field Office
800 N. Magnolia Ave. Suite 1100
Orlando, FL 32803
T - (407) 956-5600
F - (407) 956-5599

Misty Kane
Enterprise Florida, Inc.
Jacksonville International Field Office
Three Independent Drive
Jacksonville, FL 32202
T - (904) 359-9350
F - (904) 359-9307

Enterprise Florida, Inc.
Tallahassee International Field Office
Atrium Building - Suite 201
325 John Knox Road
Tallahassee, FL 32303
T - (850) 298-6620
F - (850) 298-6659

Andrea Moore
Enterprise Florida, Inc.
Pensacola International Field Office
117 West Garden Street
Pensacola, FL 32501
T - (850) 469-8989
F - (850) 469-8986

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

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 (FGCU) 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 or 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

10501 FGCU Blvd. South

Fort Myers, FL 33965

T - (239) 745-3700

F - (239) 745-3710

<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

10501 FGCU Blvd. South
Fort Myers, FL 33965-6565
T - (239) 745-3700
F - (239) 745-3710
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.

For more information contact:

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

26300 Airport Road

Punta Gorda, FL 33950

T - (941) 637-5629 or (941) 637-5654

F - (941) 637-3500

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

18501 Murdock Circle

Port Charlotte, FL 33948-3399

T - (941) 255-7500

F - (941) 255-7509

<http://charlottetechcenter.ccps.k12.fl.us>

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
 Email: score0318@aol.com
www.score0318.com

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

8280 College Parkway, Suite 204
 Fort Myers, FL 33919-4113
 T - (239) 652-5588
 F - (239) 652-9988
 E-mail: admin@idscorp.org
www.idscorp.org

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., Suite 103

Celebration, FL 34747

T - (321) 939-4000

E-mail: info@floridamep.org

www.floridamep.org

Winifred Grebey

winifredg@floridamep.com

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: floridaedo@charlottefl.com

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

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

252 West Marion Avenue
Punta Gorda, FL 33950
T – (941) 639-3720
F – (941) 639-7498
E-mail: chamber@puntagorda-chamber.com
www.puntagordachamber.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

Community Development: Occupational License Department

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

Inspection Requests

18400 Murdock Circle
Pt. Charlotte, FL 33948
T - (941) 743-1201
www.charlottecountyfl.com

Permitting

18400 Murdock Circle
Pt. Charlotte, FL 33948
T - (941) 743-1201
www.charlottecountyfl.com

Tax Collector

18500 Murdock Circle
Pt. Charlotte, FL 33948
T - (941) 743-1350
F - (941) 743-1364
www.cctaxcol.com

Zoning

18500 Murdock Circle Bldg. B
Pt. Charlotte, FL 33948
T - (941) 743-1221
F – (941) 743-1228
www.charlottecountyfl.com

Career & Service Center of Charlotte County

1032 Tamiami Trail Unit 9
Port Charlotte, FL 33953
T - (941) 235-5900
www.careerandservicecenter.org

Charlotte County Chamber of Commerce

2702 Tamiami Trail
Port Charlotte, FL 33952
T – (941) 627-2222
F – (941) 627-9730
www.charlottecountychamber.org

Charlotte Technical Center

18150 Murdock Circle
Port Charlotte, FL 33948-3399
E-Mail: 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 or (941) 637-5654
F - (941) 637-3500
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
www.englewoodchamber.com

STATE OF FLORIDA:***Enterprise Florida, Inc.***

800 N. Magnolia Avenue, Suite 1100
Orlando, FL 32803
E-Mail: information@eflorida.com
T - (407) 956-5600
F - (407) 956-5599
www.eflorida.com

FL Dept of Business and Professional Regulation

1940 North Monroe Street
Tallahassee, FL 32399-0750
T - (850) 487-1395
F - (850) 921-2124
www.myfloridalicense.com/dbpr
www.myflorida.com

***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

***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

FGCU Location

10501 FGCU Blvd, South
Fort Myers, FL 33965-6565
T - 239-745-3700
F - 239-745-3710
<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

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

FL Department of Revenue

5050 West Tennessee Street
Tallahassee, FL 32399-0100
T - (850) 488-6800
<http://www.myflorida.com>
www.myflorida.com/dor

***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
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

Consumer Fraud Awareness, Inc.

15821 Country Court
Fort Myers, FL 33912-2329
T - (239) 931-0550
F - (239) 931-0559
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
T - (786) 845-0400
F - (786) 845-0404
www.dos.state.fl.us/fefc/

Florida Gulf Coast University Small Business Development Center

10501 FGCU Blvd. South
Fort Myers, FL 33965-6565
T - (239) 745-3700
F - (239) 745-3710
E-mail: cli@fgcu.edu
<http://cli.fgcu.edu/sbdc>

FL Manufacturing Extension Partnership

Contact: Winifred Grebey
winifred@floridamep.com
1180 Celebration Blvd., Suite 103
Celebration, FL 34747
T - (321) 939-4000
E-mail: info@floridamep.org
www.floridamep.org

Florida Power and Light

P.O. Box 025576
Miami, FL 33102
T – (941) 639-1106
www.fpl.com

Independent Development Services Corp.

8280 College Parkway
Fort Myers, FL 33919
T – (239) 652-5588
F – (239) 652-9988
E-mail: admin@srdcorp.org
www.idscorp.org

SCORE

1777 Tamiami Trail Suite 411
Port Charlotte, FL 33948
T - (941) 743-6179
E-mail: score03182@aol.com
www.score0318.com

CenturyLink (formerly EMBARQ)

T – 877-290-5458
www.centurylink.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

U.S. Department. of Commerce

Trade Information Center
1401 Constitution Avenue NW
Washington, DC 20230
T – (800) 872-8723 OR
T – (202) 482-2000
F - (202) 482-4473
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

U.S. Internal Revenue Service

1-800-829-4933
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

U.S. Postal Service

130 E. Marion Avenue
Punta Gorda, FL 33950
T - 800-275-8777
F – 941-639-7346
www.usps.gov

LEGAL CONTACTS

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

All Injuries Law Firm of Brian O. Sutter

2340 Tamiami Trail
Port Charlotte, FL 33952
T – (941) 623-9630
F – (941) 625-8772
www.allinjurieslawfirm.com

Fritsch & Powell, LLC

121 E. Marion Ave., Suite 111
Punta Gorda, FL 33950
T - (941) 205-2505
F - (941) 205-2507
E-mail: michael@fplawoffice.com
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Bogle, Tauna R., PA

122 Nesbit Street #113
Punta Gorda, FL 33950
T – (941) 505-2645
F – (941) 505-2646
E-mail: tbogle@tboglelaw.com
www.tboglelaw.com

Goldstein, Buckley, Cechman, Rice & Purtz, PA

2852 Tamiami Trail, Suite 1
Port Charlotte, FL 33952
T – (941) 624-2393
F – (941) 624-2155
E-mail: kyurglic@gbclaw.com
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230 Bal Harbor Blvd., Suite 113
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T - (941) 833-9262
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Henderson, Franklin, Starnes & Holt, PA

PO Box 280
Fort Myers, FL 33902
1715 Monroe Street
Fort Myers, FL 33902
T – (239) 344-1186
F – (239) 344-1593
E-mail: gail.lamarche@henlaw.com
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Draper Law Firm, PL

122 Nesbit Street, #111
Punta Gorda, FL 33950
T – (941) 833-8383
F – (941) 833-8384

Hevia, Jesus M. PA,

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

Farr, Farr, Emerich, Hackett & Carr, PA

99 Nesbit Street
Punta Gorda, FL 33950
T - (941) 639-1158
F - (941) 639-0028
E-mail: abrazelton@farr.com
www.farr.com

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

Remax Palm Realty
Contact: Peter Rivera
1700 Tamiami Trail, Unit G2
Port Charlotte, FL 33948
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F – (941) 743-5518
E-mail: priveraremax@yahoo.com
www.flwaterfront.com

LEGAL CONTACTS - Continued

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 126 E. Olympia Avenue
 Punta Gorda, FL 33950
 T – (941) 505-2555
 F – (941) 505-4355
 E-mail: pkeller@kellerlaw.biz
www.kellerlaw.biz

Kirshy, Russell T., Esquire, PA
 3841 Tamiami Trail, Suite A
 Port Charlotte, FL 33952
 T- (941) 255-5525
 F- (941) 255-3552
 E-mail: rtkirshy@aol.com
www.kirshylaw.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: ajljal@jcomcast.net

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
www.lucaslawfirm.org

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 126 E. Olympia Avenue Suite 404
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 F - (941) 639-3104

**Berntsson, Ittersagan, Gunderson,
 Waksler & Wideikis, LLP**
 18401 Murdock Circle, Suite C
 Port Charlotte, FL 33948
 T - (941) 627-1000
 F - (941) 255-0684
 E-mail: pflynn@bigwlaw.co
www.bigwlaw.com

Mizell Law Firm, PA
 PO Box 510814
 Punta Gorda, FL 33951
 311 Sullivan St.
 Punta Gorda, FL 33950
 T – (941) 575-9291
 F – (941) 575-9296
 E-Mail: info@mizell-law.com
www.mizell-law.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: doaksesq@comcast.net
www.lawyers.com/davidkoakslaw

Olmsted & Wilson, PA
 17801 Murdock Circle, Suite A
 Port Charlotte, FL 33948
 T - (941) 624-2700
 F - (941) 624-5151
 E-mail: david@owpa.com
www.owpa.com

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F – (941) 429-8961
E-mail: kevin@wkevinrussell.com

www.wkevinrussell.com

Schaffer, Robert J., Attorney at Law

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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
www.wilkinslaw.com

Wotitzky, Wotitzky, Ross & McKinley, PA

223 Taylor Street
Punta Gorda, FL 33950
T - (941) 639-2171
F - (941) 639-8617
Email: shudson@wotitzkylaw.com
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.

Ashley and Brown, CPAs

366 E. Olympia Avenue
Punta Gorda, FL 33950
T - (941) 639-6600
F - (941) 639-6115
E-Mail: don.ashley-brown@embarqmail.com

Strang, Olsen & Lynch CPAs, PA

334 W. Olympia Avenue
Punta Gorda, FL 33950
T - (941) 639-0888
F - (941) 639-6296
E-mail: cpa@sol-cpas.com
www.strang-cpa.com

Crosland, Joiner, Schortz, Sorah & Co. PA

4161 Tamiami Trail, Suite 501
Port Charlotte, FL 33952
T - (941) 629-1197
F - (941) 629-5274
www.cpaswf.com

Summers, Horner, Daughtrey & Westby, CPAs

PO Box 510308
Punta Gorda, FL 33951
222 Nesbit Street
Punta Gorda, FL 33950
T - (941) 639-2146
F - (941) 639-0558
E-mail: pgcpas@comcast.net

Dees & Dees CPA, PA

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

Webb, Lorah & Company, PL

1107 W. Marion Avenue, Unit 115
Punta Gorda, FL 33950
T - (941) 637-8884
F - (941) 639-8962
E-mail: ewebb@webblorahcpa.com
www.webblorahcpa.com

Francis E. Hoban, Jr., CPA, PA

PO Box 495250
Port Charlotte, FL 33949
4055 Tamiami Trail, A4
Port Charlotte, FL 33952
T - (941) 624-0192
F - (941) 625-2747
E-Mail: fhoban CPA@embarqmail.com

Jay Wunder, CPA

17801 Murdock Circle Suite C
Port Charlotte, FL 33948
T - (941) 766-8686
F - (941) 766-8778
E-mail: jaywunder@jaywundercpa.com
www.jaywundercpa.com

Koch & Company, CPA, PA

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

Charlotte County Economic Development Office

18501 Murdock Circle, Suite 502

Port Charlotte, FL 33948-1039

T - (941) 627-3023

T - (800) 729-5836

F - (941) 627-6314

WEBSITE: www.FloridaEDO.com

E-Mail: FloridaEDO@charlottefl.com

