

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.

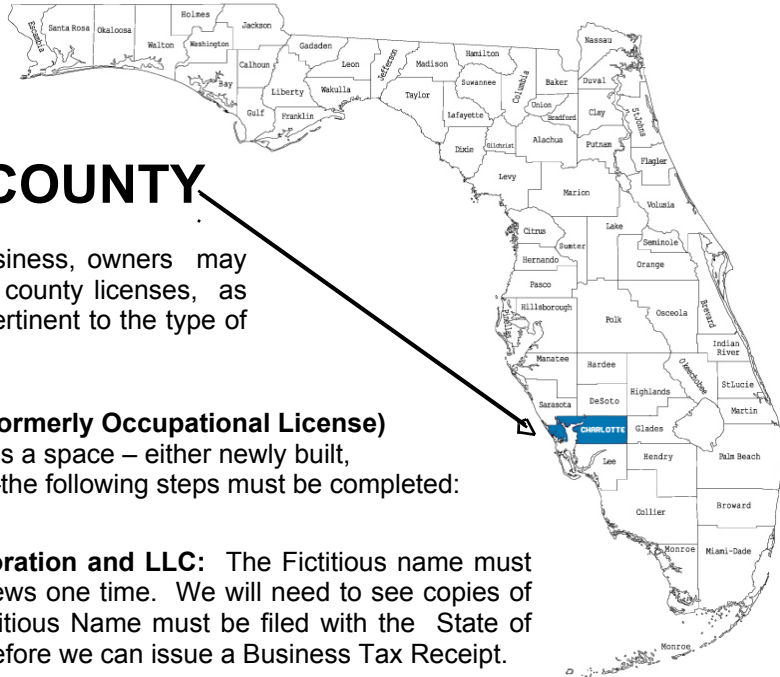
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Note: T = Telephone
F = Facsimile

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 18400 Murdock Circle (941-743-1201) or online at <http://www.charlottecountyfl.gov/dept/commdev/Pages/Forms-Documents-Listing.aspx#Zoning>. Once the form is completed and submitted, inspection visits for plumbing, electric, fire and zoning will be scheduled and inspection fees will be applied. If property is on septic, you must obtain an authorization form from the Health Department at 18500 Murdock Circle, Port Charlotte room 203 (941-743-1266), and pay a fee ranging in amount depending on the system. A Certificate of Occupancy will be issued by the Community Development 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.cctaxcol.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 Charlotte County Tax Collector's Office.

Charlotte County Community Development Department

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

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.myfloridalicense.com



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 in more than 200 offices 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

<http://dor.myflorida.com/Pages/default.aspx>

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

CORPORATE INCOME TAX

- ⇒ All corporations (including tax-exempt organizations) doing business, earning income, or existing in Florida must file.
- ⇒ Florida corporate income tax liability is computed using federal taxable income, modified by certain Florida adjustments, to determine adjusted federal income.
 - A corporation doing business outside Florida may apportion its total income. Adjusted federal income is apportioned to Florida using a three-factor formula. The formula is a weighted average, designating 25 percent each to factors for property and payroll, and 50 percent to sales.
 - You should add nonbusiness income allocated to Florida to the Florida portion of adjusted federal income.
 - You should then subtract an exemption of up to \$50,000 to arrive at Florida net income.
 - Finally, you should compute tax by multiplying Florida net income by 5.5 percent.

INTANGIBLE PERSONAL PROPERTY TAX

- ⇒ The nonrecurring tax on a note, bond, or other obligation for payment of money that is secured by a mortgage deed or other lien on real property.
- ⇒ The recurring tax on the lease of real property owned by a government and leased to a non-governmental entity when rental payments are due.

SALES AND USE TAX

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

- ⇒ Each sale, admission charge, storage, or rental unless the transaction is specifically exempt
- ⇒ If you buy a taxable item in Florida and didn't pay sales tax
- ⇒ If you buy an item tax-exempt intending to resell it and then use the item in your business or for personal use
- ⇒ If you buy a taxable item outside Florida and bring it into or have it delivered into Florida and you did not pay sales tax on the item

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://dor.myflorida.com/Pages/default.aspx>

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

TANGIBLE PERSONAL PROPERTY TAX

- ⇒ Tangible Personal Property means all goods, chattels, and other articles of value (excluding some vehicular items) capable of manual possession and whose chief value is intrinsic to the article itself. Inventory and household goods are excluded.
- ⇒ Anyone who owns TPP on January 1 and who has a proprietorship, partnership, or corporation, or is a self-employed agent or a contractor, must file a tangible personal property return to the property appraiser by April 1 each year.
- ⇒ Property owners who lease, lend or rent property must also file.

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

- ⇒ An excise tax is a tax directly levied on certain goods by the state government. The most prominent excise taxes collected by the Florida state government are the fuel tax on gasoline and the so-called "sin tax" collected on cigarettes and alcoholic beverages.
- ⇒ Excise Tax information can be found on the State's web site at http://www.myfloridalicense.com/dbpr/abt/rules_statutes/tax_rate_info.html

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 meet any of the following conditions:
 - ✓ Quarterly payroll of \$1,500 or more in a calendar year.
 - ✓ One or more employees for a day (or portion of a day) during any 20 weeks in a calendar year.
 - ✓ Agricultural employer with five or more workers for a day (or portion of a day) during any 20 weeks in a calendar year, or a \$10,000 cash payroll in any calendar quarter.
 - ✓ Private home or college club that paid \$1,000 cash in a quarter for domestic services.
 - ✓ Liable for federal unemployment tax.
 - ✓ All or part of a liable business purchased, or the combination of existing payroll/employment and that of the business purchased meets the liability criteria.
 - ✓ Nonprofit organization as defined in section (s.) 3306(c)(8) of the Federal Unemployment Tax Act and s. 501(c)(3) of the Internal Revenue Code and four or more employees for a day (or portion of a day) during any 20 weeks in a calendar year.
 - ✓ State, county, city, or joint governmental unit.
 - ✓ Indian tribe or tribal unit.
 - ✓ Previously liable for reemployment (unemployment) tax in the State of Florida.
 - ✓ The minimum and maximum tax rates, effective January 1, 2015, are as follows (based on annual salary up to \$7,000 per employee):
 - Minimum rate: 0.0024 or \$16.80 per employee
 - Maximum rate: 0.0540 or \$378 per employee

For more information, read the [2015 reemployment tax rates fact sheet](#).

http://dor.myflorida.com/Forms_library/current/rt800001.pdf - Florida Guide to Reemployment Assistance Benefits
<http://dor.myflorida.com/dor/taxes/reemployment.html> - What Employers Need to Know About Florida Reemployment Tax

DOCUMENTARY STAMP TAX

- ⇒ Documentary stamp tax is levied at the rate of \$.70 per \$100 (or portion thereof) on documents that transfer interest in Florida real property, such as warranty deeds and quit claim deeds. This tax is usually paid to the Clerk of Court when the document is recorded.

- ⇒ Documentary stamp tax is also levied at the rate of \$.35 per \$100 (or portion thereof) on documents that are executed or delivered in Florida, for example:
 - Notes and other written obligations to pay.
 - Certain renewal notes.
 - Bonds (original issuance).
 - Mortgages.
 - Liens.

- ⇒ Florida law limits the maximum tax due on notes and other written obligations to \$2,450. However, there is no limit on the documentary stamp tax due for mortgages or liens filed or recorded in Florida.

- ⇒ A [reference sheet](#) is available to help determine the correct amount of documentary stamp tax due on documents that transfer an interest in Florida real property.

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/Default.aspx

TOURIST DEVELOPMENT TAX

Charlotte County levies 5% 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

CAREER SOURCE FLORIDA

CareerSource Florida is a statewide network of career development professionals who work directly for Florida employers to find, develop and keep qualified talent. They also invest in programs to help businesses identify and cultivate our state's talent pool so that prospective employees have the skills and experience companies seek.

They connect employers with qualified, skilled talent and Floridians with employment and career development opportunities to achieve economic prosperity.

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:

CareerSource Southwest Florida Administration Office

9530 Marketplace Road, Suite 104,

Fort Myers, FL 33912

T – 239-225-2500

<http://careersourcesouthwestflorida.com>

CareerSource Southwest Florida

1032 Tamiami Trail, Unit 9

Port Charlotte, FL 33953

T - (941) 235-5900

<http://careersourcesouthwestflorida.com>

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. 39.3% of Charlotte County's population is in the labor working force.
2. The population of Charlotte County has increased by 41.7% between the period 1990 and 2010.
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
 - Florida Southwestern State College
<https://www.fsw.edu/>
941-637-5629
 - **State College of Florida Manatee-Sarasota**
www.scf.edu
941-408-1300
 - **Charlotte Technical Center**, Port Charlotte
<http://charlottetechcenter.com>
941-255-7500

See www.FloridasInnovationCoast.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.

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, 2015, the average annual wage for Charlotte County is \$32,396, and are as follows:

1. \$ 1,000 for Quality Jobs with salaries equal to or greater than the Florida Wage plus fifteen percent (15%), \$37,255.
2. \$ 1,500 for Quality Jobs with salaries equal to or greater than the Florida Wage plus fifty percent (50%), \$48,594.
3. \$ 2,000 for Quality Jobs with salaries equal to or greater than the Florida Wage plus one hundred percent (100%), \$64,792.

Enterprise Florida, Inc. has identified certain target industries in its marketing and sales strategy. The list of qualifying industries is available at www.eflorida.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) 764-4941 or by visiting 18501 Murdock Circle, Suite 302, Port Charlotte, Florida 33948.



FLORIDA Inc.

BUSINESS INCENTIVES

Targeted Industry Incentives

Qualified Target Industry Tax Refund (QTI): The Qualified Target Industry Tax Refund incentive is available for companies that create high wage jobs in targeted high value-added industries. This incentive includes refunds on corporate income, sales, ad valorem, intangible personal property, insurance premium, and certain other taxes. Pre-approved applicants who create jobs in Florida receive tax refunds of \$3,000 per net new Florida full-time equivalent job created; \$6,000 in an Enterprise Zone or Rural Community (county). For businesses paying 150 percent of the average annual wage, add \$1,000 per job; for businesses paying 200 percent of the average annual salary, add \$2,000 per job; businesses falling within a designated high impact sector or increasing exports of its goods through a seaport or airport in the state by at least 10 percent in value or tonnage in each year of receiving a QTI refund, add \$2,000 per job; projects locating in a designated Brownfield area (Brownfield Bonus) can add \$2,500 per job. The local community where the company locates contributes 20 percent of the total tax refund. No more than 25 percent of the total refund approved may be taken in any single fiscal year. New or expanding businesses in selected targeted industries or corporate headquarters are eligible.

Qualified Defense and Space Contractor Tax Refund (QDSC): Florida is committed to preserving and growing its high technology employment base by giving Florida defense, homeland security, and space business contractors a competitive edge in consolidating contracts or subcontracts, acquiring new contracts, or converting contracts to commercial production. Pre-approved applicants creating or retaining jobs in Florida may receive tax refunds of \$3,000 per net new Florida full-time equivalent job created or retained; \$6,000 in an Enterprise Zone or rural county. For businesses paying 150 percent of the average annual wage, add \$1,000 per job; for businesses paying 200 percent of the average annual salary, add \$2,000 per job.

Capital Investment Tax Credit (CITC): The Capital Investment Tax Credit is used to attract and grow capital-intensive industries in Florida. It is an annual credit, provided for up to twenty years, against the corporate income tax. Eligible projects are those in designated high-impact portions of the following sectors: clean energy, biomedical technology, financial services, information technology, silicon technology, transportation equipment manufacturing, or be a corporate headquarters facility. Projects must also create a minimum of 100 jobs and invest at least \$25 million in eligible capital costs. Eligible capital costs include all expenses incurred in the acquisition, construction, installation, and equipping of a project from the beginning of construction to the commencement of operations. The level of investment and the project's Florida corporate income tax liability for the 20 years following commencement of operations determines the amount of the annual credit.

High Impact Performance Incentive Grant (HIPI): The High Impact Performance Incentive is a negotiated grant used to attract and grow major high impact facilities in Florida. Grants are provided to pre-approved applicants in certain high-impact sectors designated by the Florida Department of Economic Opportunity (DEO). In order to participate in the program, the project must: operate within designated high-impact portions of the following sectors—clean energy, corporate headquarters, financial services, life sciences, semiconductors, and transportation equipment manufacturing; create at least 50 new full-time equivalent jobs (if a R&D facility, create at least 25 new full-time equivalent jobs) in Florida in a three-year period; and make a cumulative investment in the state of at least \$50 million (if a R&D facility, make a cumulative investment of at least \$25 million) in a three-year period. Once recommended by Enterprise Florida, Inc. (EFI) and approved by DEO, the high impact business is awarded 50 percent of the eligible grant upon commencement of operations and the balance of the awarded grant once full employment and capital investment goals are met.

FLORIDA Inc. BUSINESS INCENTIVES

Workforce Training Incentives

Quick Response Training Program (QRT): Quick Response Training (QRT) – an employer-driven training program designed to assist new value-added businesses and provide existing Florida businesses the necessary training for expansion. A state educational facility – community college, area technical center, school district or university – is available to assist with application and program development or delivery. The educational facility will also serve as fiscal agent for the project. The company may use in-house training, outside vendor training programs or the local educational entity to provide training.

Reimbursable training expenses include: instructors'/trainers' wages, curriculum development, and textbooks/manuals. This program is customized, flexible, and responsive to individual company needs. To learn more about the QRT program, visit [CareerSource Florida](#).

Incumbent Worker Training Program (IWT): Incumbent Worker Training (IWT) – a program that provides training to currently employed workers to keep Florida's workforce competitive in a global economy and to retain existing businesses. The program is available to all Florida businesses that have been in operation for at least one year prior to application and require skills upgrade training for existing employees. Priority is given to businesses in targeted industries, Enterprise Zones, HUB Zones, Inner City Distressed areas, Rural Counties and areas, and Brownfield areas. For additional information on the IWT program, visit [CareerSource Florida](#).

Infrastructure Incentives

Economic Development Transportation Fund: The Economic Development Transportation Fund, commonly referred to as the "Road Fund," is an incentive tool designed to alleviate transportation problems that adversely impact a specific company's location or expansion decision. The award amount is based on the number of new and retained jobs and the eligible transportation project costs, up to \$3 million. The award is made to the local government on behalf of a specific business for public transportation improvements.

Special Opportunity Incentives

Rural Incentives: Florida encourages growth throughout the state by offering increased incentive awards and lower wage qualification thresholds in its rural counties. Additionally, a Rural Community Development Revolving Loan Fund and Rural Infrastructure Fund exist to meet the special needs that businesses encounter in rural counties.

Urban Incentives: Florida offers increased incentive awards and lower wage qualification thresholds for businesses locating in many urban core/inner city areas that are experiencing conditions affecting the economic viability of the community and hampering the self-sufficiency of the residents.

Enterprise Zone Incentives: Florida offers an assortment of tax incentives to businesses that choose to create employment within an enterprise zone, which is a specific geographic area targeted for economic revitalization. These include a sales and use tax credit, tax refund for business machinery and equipment used in an enterprise zone, sales tax refund for building materials used in an Enterprise Zone, and a sales tax exemption for electrical energy used in an enterprise zone.

Brownfield Incentives: Florida offers incentives to businesses that locate on a brownfield site with a Brownfield Site Rehabilitation Agreement (BSRA). The Brownfield Redevelopment Bonus Refund is available to encourage Brownfield redevelopment and job creation. Approved applicants receive tax refunds of up to \$2,500 for each job created.

FOREIGN TRADE

Florida's foreign trade had an estimated output volume of some \$85 billion in merchandise exports in 2013. Florida ranked 7th in the U.S. in 2013 in exporting goods produced, or with significant value added, in the state.

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
<http://fefc.dos.myflorida.com/>

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



U.S. SMALL BUSINESS ADMINISTRATION (SBA) PROGRAMS

SBA Export Working Capital Program

The Export Working Capital (EWCP) loan provides advances for up to \$5 million to fund export transactions from purchase order to collections. This loan has a low guaranty fee and quick processing time.

Application Process

Contact your local lender to see if they are approved to underwrite EWCP loans. You can apply for EWCP loans before finalizing an export sale or contract.

With an approved EWCP loan in place, you have greater flexibility in negotiating export payment terms. However, disbursements can only be made against firm purchase orders from a foreign buyer or to support foreign accounts receivable.

Use of Proceeds

- Financing for suppliers, inventory, WIP, or production of export goods or services
- Working capital to support foreign accounts receivable during long payment cycles
- Financing for stand-by letters of credit used as bid or performance bonds or as down payment guarantees

Contact your local [U.S. Export Assistance Center](#) to learn more about the Export Working Capital Program and whether your business qualifies.

SBA International Trade Loans

The International Trade Loan offers loans up to \$5 million for fixed assets and working capital for businesses that plan to start or continue exporting.

Eligibility

International Trade Loans are available if your small business is in a position to expand existing export markets or develop new export markets. These loans are also available if your small business has been adversely affected by import competition and can demonstrate that the loan proceeds will improve your competitive position.

Use of Proceeds

The borrower may use loan proceeds to acquire, construct, renovate, modernize, improve, or expand facilities and equipment to be used in the United States to produce goods or service involved in international trade and to develop and penetrate foreign markets. Funds also may be used to refinance an existing loan.

Application Process

Contact your existing lender to determine if they are an SBA-approved 7(a) lender. If so, they are authorized to underwrite an International Trade Loan. SBA will work with your lender to determine borrower eligibility.

You also may contact your local [U.S. Export Assistance Center](#) to find out if your business qualifies for an International Trade Loan.

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 for an invention is the grant of a property right to the inventor, issued by the United States Patent and Trademark Office. Generally, the term of a new patent is 20 years from the date on which the application for the patent was filed in the United States or, in special cases, from the date an earlier related application was filed, subject to the payment of maintenance fees. What is granted is not the right to make, use, offer for sale, sell or import, but the right to exclude others from making, using, offering for sale, selling or importing the invention.
- ✓ U.S. patent grants are effective only within the United States, U.S. territories, and U.S. possessions. Under certain circumstances, patent term extensions or adjustments may be available.

➤ TRADEMARKS

- ✓ A trademark is a word, name, symbol, or device that is used in trade with goods to indicate the source of the goods and to distinguish them from the goods of others.

➤ SERVICE MARKS

- ✓ A servicemark is the same as a trademark except that it identifies and distinguishes the source of a service rather than a product.

The terms “trademark” and “mark” are commonly used to refer to both trademarks and servicemarks. Trademark rights may be used to prevent others from using a confusingly similar mark, but not to prevent others from making the same goods or from selling the same goods or services under a clearly different mark.

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

Copyright is a form of protection provided to the authors of "original works of authorship" including literary, dramatic, musical, artistic, and certain other intellectual works, both published and unpublished. The 1976 Copyright Act generally gives the owner of copyright the exclusive right to reproduce the copyrighted work, to prepare derivative works, to distribute copies or phonorecords of the copyrighted work, to perform the copyrighted work publicly, or to display the copyrighted work publicly. The copyright protects the form of expression rather than the subject matter of the writing.

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.

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.FloridasInnovationCoast.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:

Charlotte County Economic Development Office

18501 Murdock Circle, Suite 302

Port Charlotte, FL 33948

E-Mail: FloridaEDO@charlottefl.com

T - (941) 764-4941

F - (941) 764-4947

www.FloridasInnovationCoast.com

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

Note: T = Telephone
F = Facsimile

Enterprise Florida, Inc. (EFI) Headquarters

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

Miami - International Trade & Development

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

Tallahassee

101 North Monroe Street
Suite 1000
Tallahassee, FL 32301
T - (850) 298-6620
F - (850) 298-6659

INTERNATIONAL OFFICES

The Americas

BRAZIL (San Paulo)

Fabio Yukio Yamada, Director
Mariana Falkenburger, Manager
WTC Business Tower
Av. Nacoes Unidas, 12551
4th Floor
Sao Paulo, SP, Brazil 04578-903
T - (55-11) 3044 4848

MEXICO (Mexico City)

Ana Arroyo Yllanes, Director
Pestalozzi No. 1204, Int. 303
Colonia del Valle
Mexico, D.F. 03100
T - (52-55) 2455-3971 to 73

CANADA (Toronto)

Gillian Hatton, Director
970 Eglinton Avenue W.
Toronto, ON, Canada M6C 2C5
T - +1 (416) 277-5269

CANADA (Montreal)

Daniel Silverman, Director
416 de Maisonneuve West, Suite 1000
Montreal, QC, Canada H3A 1L2
T - +1 (514) 495-5231

Asia

JAPAN (Tokyo)

K. Sam Tabuchi, Director
Fukuda Bldg., 5F
2-3-23, Hamamatsu-cho
Minato-ku, Tokyo 105-0013 Japan
T - 81 (0) 3-3578-8777

TAIWAN

Wennie Chen, Director
T - (886-2) 2758-5181



FLORIDA

International Offices Continued

CHINA (Shanghai Office)

Carol Fu, Director
Enterprise Florida
Unit 301-303, Platinum Tower
233 Tai Cang Road
Shanghai 200020
People's Republic of China
T - (86-21) 5298-4668 Ext. 226

CHINA (Hong Kong Office)

Emma Yeung, Director
1903 Cambridge House
TaiKoo Place
979 King's Road, Quarry Bay
Hong Kong
T - (852) 2826-933

Europe

CZECH REPUBLIC & The SLOVAK REPUBLIC (Prague Liaison Office)

Jan Kozubek, Director
T - (420) 224 900 027

France (Paris)

Hugues de Cibon, Director
12 Rue de la Chaussée d'Antin,
75009 Paris, France
T - 33 (0) 143 87- 56 40

GERMANY

Alexander Bothmann, Deputy Director
Im Amerika Haus,
Karolinenplatz 3
80333 München, Germany
T - (49-89) 9901-3665

SPAIN

Gonzalo Arance, Deputy Director
Paseo de la Castellana 164, 6ºD
28046 Madrid, Spain
T - (34-91) 781-3483

U.K. & IRELAND (London)

Julia Mills, Deputy Director
6th Floor, 36-38 Whitefriars Street,
London EC4Y 8BQ,
United Kingdom
T - 44 (0) 207-822-0718

Middle East/Africa

SOUTHERN AFRICA (Durban)

Abigail Ellary, Director
The Business Centre
2 Ncondo Place, Ridgeside,
Postnet Suite 47,
Private Bag X01,
Umhlanga Rocks,
Durban 4320 South Africa
T - 27 (0) 31-830-5054

ISRAEL (Ramat Ha Sharon)

Nurit Gazit, Director
10 Sold Street
P.O.B. 1183
Ramat Ha Sharon, 47225
Israel
T - (972-3) 540-0390

Note: T = Telephone
F = Facsimile

FLORIDA

FLORIDA TRADE OFFICES

Jacksonville/Northeast

Counties Served: Alachua, Baker, Bradford, Clay, Columbia, Dixie, Duval, Flagler, Gilchrist, Hamilton, Lafayette, Levy, Madison, Nassau, Putnam, St. Johns, Suwannee, Taylor, Union

[Larry Bernaski, Regional Manager](#)
(Marine Industry Specialist)
International Trade Development
Three Independent Drive
Jacksonville, FL 32202
T (904) 359-9350

Orlando/Central Florida

Counties Served: Brevard, Highlands, Lake, Marion, Orange, Osceola, Polk, Seminole, Sumter, Volusia

[Paul Mitchell, Regional Manager](#)
(Aviation/Aerospace Specialist)
International Trade Development
800 N. Magnolia Avenue
Suite 1100
Orlando, FL 32803
T (407) 956-5639

Tampa Bay

Counties Served: Charlotte, Citrus, Desoto, Hardee, Hernando, Hillsborough, Manatee, Pasco, Pinellas, Sarasota

[Maxwell Stewart, Regional Manager](#)
(Canada/Mexico and Processing & Packaging Specialist)
International Trade Development
201 North Franklin Street, Suite 201
Tampa, FL 33602
T (813) 276-9430

Note: T = Telephone
F = Facsimile

Miami-Dade & Southwest FL

Counties Served: Collier, Glades, Hendry, Lee, Miami-Dade, Monroe

[Stephanie Pavolini, Regional Manager](#)
(Latin American and Caribbean Specialist)
International Trade Development
[Jorge Riano, Regional Manager](#)
International Trade Development
201 Alhambra Circle, Suite 610
Coral Gables FL 33134
T (305) 808-3660

Pensacola/Northwest/Tallahassee

Counties Served: Bay, Calhoun, Escambia, Franklin, Gadsden, Gulf, Holmes, Jackson, Jefferson, Leon, Liberty, Okaloosa, Santa Rosa, Wakulla, Walton, Washington

[Andrea Moore, Regional Manager](#)
(ICT & Computer Industry Specialist)
International Trade Development
117 West Garden Street
Pensacola, FL 32502
T (850) 469-8989

West Palm Beach/Southeast

Counties Served: Broward, Indian River, Martin, Okeechobee, Palm Beach, St. Lucie

[John Diep, Regional Manager](#)
(Asia Specialist and Clean Technology Specialist)
International Trade Development
310 Evernia Street
West Palm Beach, FL 33401
T (561) 832-8339



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 <http://business.usa.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 **FLORIDA SOUTHWESTERN STATE COLLEGE**

Continuing Education is a unique dimension of Florida SouthWestern State 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:

Florida SouthWestern State 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.fsw.edu/

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
 E-mail: score0318@aol.com
portcharlotte.score.org

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) 764-4941
 E-Mail: floridaedo@charlottefl.com
www.spacetechnologies.com



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

Tax Collector: Business Tax Receipt

18500 Murdock Circle
Port Charlotte, FL 33948
T - (941) 743-1201
F - (941) 743-1213
www.cctaxcol.com

Inspection Requests

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

Permitting

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

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
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://dor.MyFlorida.com/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.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



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
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, Suite 204
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: port.charlotte@scorevolunteer.org
www.charlottesdesotocore.org

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, Punta Gorda Chamber of Commerce or Englewood Area Chamber of Commerce.

Allen J. Levin, Attorney at Law

3440 Conway Blvd., Auite 1A
Port Charlotte, FL 33952-7050
T - (941) 625-4189
F - (941) 624-4633
E-mail: levlaw@comcast.net

All Injuries Law Firm, PA

2340 Tamiami Trail
Port Charlotte, FL 33952-3924
T - (941) 625-4878
F - (941) 625-8772
www.allinjurieslawfirm.com

Amber L. Weaver, Esquire, PA

6210 Scott Street #111
Punta Gorda, FL 33950
T - (941) 637-0909
F - (941) 637-0904
E-mail: weaverlawfirm@daystar.net

Arlene C. Chase, PA

21216 Olean Blvd., Suite 7
Port Charlotte, FL 33952
T - (941) 625-4142
F - (941) 274-1313
E-mail: arlene@chasepa.com
<http://www.chasepa.com>

Ball Law Center, PA

18245 Paulson Drive
Port Charlotte, FL 33954
T - (941) 740-2255
F - (941) 426-1656
E-mail: lance@balllawcenter.com
<http://www.balllawcenter.com>

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

Byrski Estate and Elder Law

25086 Olympia Avenue, Suite 310
Punta Gorda, FL 33950
T - (941) 833-9262
F - (941) 833-9264
E-mail: mary@byrskilaw.com
www.byrskilaw.com

Carlton & Hancock, PA

150 Laishley Court, Suite 118
Punta Gorda, FL 33950
T - (941) 625-2549
F - (941) 625-2590
E-mail: kenneth@carltonhancock.com
<http://www.floridaaccidentlawyersite.com>

David A. Dunkin, PA,

170 W. Dearborn Street
Englewood, FL 34223
T - (941) 474-7753

David K. Oaks, PA

407 E. Marion Avenue, Suite 101
Punta Gorda, FL 33950-3801
T - (941) 639-7627
F - (941) 575-0242
E-Mail: doaksesq@comcast.net

Downyok Law Firm PA

1990 Main Street, Suite 750
Sarasota, FL 34236
T - (941) 363-1477
F - (941) 866-2664
E-mail: hdownyok@downyok.com
<http://www.downyok.com>

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



LEGAL CONTACTS - Continued

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

Frohlich, Gordon & Beason
18501 Murdock Circle, Suite 103
Port Charlotte, FL 33948-1039
T - (941) 979-9010
E-Mail: kdunson@fgblawfirm.com

Howell Law Firm, PL
2705 Tamiami Trail, Suite 218
Punta Gorda, FL 33950
T – (941) 205-2525
F – (941) 205-2507
E-mail: jhowell@howell-law-firm.com
<http://www.howell-law-firm.com>

Galasso & Leskovich, LLC
265 E. Marion Avenue, Suite 112
Punta Gorda, FL 33950
T - (941) 575-5100
F - (941) 575-6400
E-mail: cristina@southernjustice.com
<http://www.southernjustice.com>

Icard, Merrill, Cullis, Timm, Furen & Ginsburg, PA
110 Sullivan Street, Suite 112
Punta Gorda, FL 33950
T – (941) 833-9244
F – (941) 833-9246
www.flwaterfront.com

Glenn N. Siegel, PA
17825 Murdock Circle, Suite A
Port Charlotte, FL 33948
T - (941) 255-1235
F - (941) 255-1223
E-mail: gsiegel@glennsiegellaw.com
<http://www.glennsiegellaw.com>

Keller Law Office, PA
126 E. Olympia Avenue, Suite 200
Punta Gorda, FL 33950
T – (941) 505-2555
F – (941) 505-4355
E-mail: pkeller@kellerlaw.biz www.kellerlaw.biz

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: tmy@gbclaw.com
<http://www.gbclaw.com>

Koch Law Firm, Robert F. Koch, PA
23283 Aberdeen Avenue
Port Charlotte, FL 33952-1808
T- (941) 235-4441
E-mail: kochlawfirm@gmail.com

Michael P. Haymans Attorney at Law, PA
215 W. Olympia Avenue
Punta Gorda, FL 33950
T - (941) 575-0007
F - (941) 575-9177
E-mail: michael@mphaymans.com
www.mphaymans.com

The Law Office of Dennis R. Wallace, PA
6230 Scott Street, # 112
Punta Gorda, FL 33950
T - (941) 916-9888
F - (941) 916-9882
www.denniswallacelaw.com

Holtz Mahshie DeCosta
252 W. Marion Avenue
Punta Gorda, FL 33950
T - (239) 206-1230
F - (239) 206-1209
www.hmdlegal.com

The Law Office of Tauna R. Bogle, 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



LEGAL CONTACTS - Continued

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

Louise Hanaoka, LLC
6210 Scott Street, Suite 116
Punta Gorda, FL 33950
T - (941) 347-8316
F - (941) 505-2646
E-mail: lhanaoka@lhlawgroup.com

The Lucas Law Firm, P.A.
17833 Murdock Circle, Suite B
Port Charlotte, FL 33948
T – (941) 206-2120
F – (941) 206-2122
E-mail: jlucas@lucaslawfirm.org
<http://www.lucaslawfirm.org>

Martella Law Firm, PL
18501 Murdock Circle, Suite 304
Port Charlotte, FL 33948-1039
T - (941) 206-3700
F - (941) 206-3701
E-Mail: mark@martellalaw.com
<http://www.martellalaw.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: mmizell@mizell-law.com
<http://www.mizell-law.com>

McCrory Law GFirm
150 Laishley Court, Suite 122
Punta Gorda, FL 33950
T - (941) 205-1122
F - (941) 205-1133
E-mail: jill@mccrorylaw.com
<http://www.mccrorylaw.com>

Olmsted & Wilson, PA
17801 Murdock Circle, Suite A
Port Charlotte, FL 33948-4000
T - (941) 624-2700
F - (941) 624-5151
E-mail: mike@owpa.com
<http://www.owpa.com>

Pavese Law Firm
1833 Hendry Street
Fort Myers, FL 33901
T – (239) 334-2195
F – (239) 332-2243
E-mail: nealmontgomery@paveselaw.com
<http://www.paveselaw.com>

Prather and Swank, P.A.
10175 Six Mile Cypress Parkway
Fort Myers, FL 33966
T – (239) 288-5437
F – (239) 791-8239
E-mail: nealmontgomery@paveselaw.com
<http://www.paveselaw.com>

Russell T. Kirshy, Esquire, PA 2886
Tamiami Trail, Suite 9
Port Charlotte, FL 33952
T- (941) 255-5525
F- (941) 255-3552
E-mail: amcgarry@daystar.net
<http://www.kirshylawfirm.com>

Sandra A. Sutliff, Attorney 3440 Conway Blvd. Suite 1C Port Charlotte, FL 33952-7050
T - (941) 743-0046
F - (941) 743-4492
E-mail: ssutliff@aol.com

Savage Law, PA
126 E. Olympia Avenue, Suite 301
Punta Gorda, FL 33950-3800
T - (941) 347-8435
F - (941) 347-8436
E-mail: msavage@savagelawpa.net
www.savagelawpa.net

Wellbaum & Emery, P.A.
686 North Indiana Avenue, Suite A
Englewood, FL 34223-2703
T - (941) 474-3241
F - (941) 475-2297

W. Kevin Russell, PA
14295 S. Tamiami Trail
North Port, FL 34287-2215
T – (941) 429-1871
F – (941) 429-8961
E-mail: kevin@wkevinrussell.com
www.wkevinrussell.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



ACCOUNTANTS & CERTIFIED PUBLIC ACCOUNTANTS

Note: The Accountants and CPAs listed below are members of the Charlotte County Chamber of Commerce, Punta Gorda 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

Donna Listenberger, CPA

21338 Edgewater Drive
Port Charlotte, FL 33952
T - (941) 276-3181
E-Mail: d_listenberger@aol.com

Barco's Accounting & Tax Service

1861 Placida Road, Suite 201
Englewood, FL 34223
T - (941) 475-5461
E-mail: barco@barcos1040.com
<http://www.barcos1040.com/>

Hackney Ames & Heitman, PA

1502 Kings Highway, Unite 400
Port Charlotte, FL 33980-5259
T - (941) 743-6495
F - (941) 625-9578
E-Mail: ephcpa@comcast.net

Beulow Financial Group

21942 Edgewater Dr.
Port Charlotte, FL 33952-9723
T - (941) 625-6534
F - (941) 625-0971
E-Mail: dale.buelow@lpl.com
<http://www.DaleBuelow.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

Charles M. Jerry, CPA,PA

207 Cross Street
Punta Gorda, FL 33950
T - (941) 209-1811
F - (941) 347-4031
E-mail: charles@cpacmj.com
<http://www.cpacmj.com>

Joseph R. Schortz, CPA, PLLC

201 W. Marion Avenue, Suite 1204
Punta Gorda, FL 33950
T - (941) 629-1197
F - (941) 629-5274
E-mail: jschortz@jrscpapllc.com
<http://www.schortzcpa.com>

Chris Murtha Accounting & Tax Services, LLC

2800 Placida Road, Suite #102
Englewood, FL 34224
T - (941) 828-1280
F - (941) 828-1283
E-mail: chris@murthaaccounting.com
<http://www.murthaaccounting.com/>

Juffe, Flischel & Murtha, PA

900 E. Pine Street, Suite 126
Englewood, FL 34223-4437
T - (941) 475-7937
F - (941) 475-1120
E-mail: cpa@fmacpas.com
<http://www.fmacpas.com/>

Dara B. Sorah, CPA, PA

1435 Collingswood Blvd., Suite G
Port Charlotte, FL 33948
T - (941) 979-8860
F - (941) 889-7155
E-Mail: dsorah@darabsorahcpa.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

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



ACCOUNTANTS & CERTIFIED PUBLIC ACCOUNTANTS - Continued

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

Mark H. Knauf, CPA, PA

2230 S. McCall Road
Englewood, FL 34224
T - (941) 474-5450

Mary G. Stewart, CPA, PA

Aztec Plaza
Port Charlotte, FL 33980
T - (941) 258-3191
F - (941) 258-3192
E-Mail: mary@ptcharlottecpa.com
<http://www.ptcharlottecpa.com>

Mercier And Cartland, PA

508 N. Indiana Avenue
Englewood, FL 34223
T - (941) 474-9309
F - (941) 474-2370
E-mail: office@englewoodcpas.com
<http://www.englewoodcpas.com>

Norma I. Ramirez, CPA

315 E. Olympia, Suite 220
Punta Gorda, FL 33950
T - (941) 661-9655
F - (941) 637-0828

Sidbury & Associates, LLC

9993 Spring Gulch Lane
Punta Gorda, FL 33950
T - (941) 916-3400
F - (941) 639-1534
www.SidburyAndAssociates.com

Scott Joiner, CPA, PLLC

701 JC Center Court #7
Port Charlotte, FL 33954
T - (941) 206-0077
F - (941) 206-0078
E-Mail: sjoiner@ScottJoinerCPA.com
<http://www.ScottJoinerCPA.com>

Spradtax, Inc.

2821 Placida Road
Englewood, FL 34224
T - (941) 697-4008
F - (941) 697-1701
E-mail: spradtax1@embarqmail.com
<http://www.spradtax.com/>

Stevens Tax Service

2511 Vasco Street, Suite 115
Punta Gorda, FL 33950
T - (941) 639-0680
F - (941) 639-8291
www.stevenstax.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

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

Terry L. Armentrout, CPA, PA

170 W. Dearborn Street
Englewood, FL 34223
T - (941) 474-5509
F - (941) 474-4949
<http://www.flcpa.us/>

Valerie Wagner & Associates, LLC

37 S. Indiana Avenue, Suite 106
Englewood, FL 34223
T - (941) 475-1976

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@webblorah.com
www.webblorah.com



Charlotte County Economic Development Office

**18501 Murdock Circle, Suite 302
Port Charlotte, FL 33948-1039**

T - (941) 764-4941

F - (941) 764-4947

WEBSITE: www.FloridasInnovationCoast.com

E-Mail: FloridaEDO@charlottefl.com



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Economic Development