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**SOAH DOCKET NO. 473-20-4071.WS
PUC DOCKET NO. 50788**

**RATEPAYERS APPEAL OF THE
DECISION BY WINDERMERE OAKS
WATER SUPPLY CORPORATION TO
CHANGE WATER AND SEWER
RATES**

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**BEFORE THE STATE OFFICE
OF
ADMINISTRATIVE HEARINGS**

FIFTH SUPPLEMENTAL DIRECT TESTIMONY

OF

JAMIE L. MAULDIN

ON BEHALF OF

WINDERMERE OAKS WATER SUPPLY CORPORATION

FEBRUARY 10, 2023

**FIFTH SUPPLEMENTAL DIRECT TESTIMONY OF
JAMIE L. MAULDIN**

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FIFTH SUPPLEMENTAL ATTACHMENTS

Fifth Supplemental Attachment JLM-1	Rate Case Expense Summary Sheet
Fifth Supplemental Attachment JLM-2	Lloyd Gosselink Rochelle & Townsend, P.C. Invoices
Fifth Supplemental Attachment JLM-3	NewGen Strategies & Solutions Invoices

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**FIFTH SUPPLEMENTAL DIRECT TESTIMONY OF
JAMIE L. MAULDIN**

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I. INTRODUCTION

Q. PLEASE STATE YOUR NAME AND ADDRESS.

A. My name is Jamie L. Mauldin. I am an attorney and a principal at the law firm of Lloyd Gosselink Rochelle & Townsend, P.C. (“Lloyd Gosselink”), which has its principal place of business located at 816 Congress Ave., Suite 1900, Austin, TX 78701.

Q. HAVE YOU FILED DIRECT TESTIMONY IN THIS PROCEEDING?

A. Yes. On March 10, 2021, I filed direct testimony, on June 7, 2021, I filed supplemental direct testimony, on November 19, 2021, I filed my second supplemental direct testimony, on December 30, 2021, I filed my third supplemental direct testimony, on May 25, 2022, I filed my fourth supplemental direct testimony on behalf of Windermere Oaks Water Supply Corporation (“WOWSC”) in defending Ratepayers Appeal of the Decision by WOWSC to Change Water and Sewer Rates against the Ratepayers (“Rate Appeal”) with the Public Utility Commission of Texas (“Commission”) in this case.

II. PURPOSE AND SCOPE

Q. WHAT IS THE PURPOSE AND SCOPE OF YOUR FIFTH SUPPLEMENTAL TESTIMONY IN THIS PROCEEDING?

1 A. The purpose of my fifth supplemental direct testimony is to present expert opinion
2 testimony concerning the reasonableness of the rate case expenses incurred by
3 WOWSC in preparing and defending the Rate Appeal since Ratepayers original filing
4 on April 27, 2020, to include expenses incurred since May 24, 2022 through
5 January 31, 2023.

6 Reimbursable rate case expenses have been incurred by WOWSC since
7 May 23, 2022 relating to the Rate Appeal proceeding. WOWSC is requesting
8 reimbursement of all reasonable rate case expenses. My first supplemental direct
9 testimony supports the reasonableness of the legal and consultant expenses WOWSC
10 incurred as of May 31, 2021. My second supplemental testimony supports the
11 reasonableness of the legal and consultant expenses incurred by WOWSC as of
12 September 30, 2021. My third supplemental testimony supports the reasonableness of
13 the legal and consultant expenses incurred by WOWSC since September 30, 2021. My
14 fourth supplemental testimony supports the reasonableness of the legal and consultant
15 expenses incurred by WOWSC since December 15, 2021. My fifth supplemental
16 testimony supports the reasonableness of the legal and consultant expenses incurred by
17 WOWSC since May 23, 2022.

18 **Q. ARE YOU SPONSORING ANY SCHEDULES?**

19 A. No.

20 **III. RECOMMENDATIONS**

21 **Q. WHAT ARE YOUR RECOMMENDATIONS?**

22 A. Based upon my review, I recommend that WOWSC be allowed to recover the
23 reasonable and necessary legal and consultant rate case expenses of \$478,184.08 as of
24 January 31, 2023, which includes expenses incurred from May 23, 2022 through

1 January 31, 2023. Since filing my fourth supplemental direct testimony, WOWSC has
2 incurred necessary and reasonable additional attorney fees associated with this
3 proceeding, including attending the Open Meeting where the Commission remanded
4 the proceeding back to the State Office of Administrative Hearings (“SOAH”),
5 participation in a prehearing conference, establishing a new procedural schedule,
6 responding to many discovery requests, preparation of defensive pleadings, reviewing
7 and analyzing other parties’ supplemental direct testimony, and overseeing and
8 preparing supplemental direct testimony and supplemental rebuttal testimony.

9 The Proposal for Decision (“PFD”) issued on March 31, 2022, recommended
10 that WOWSC recover its rate case expenses as of December 15, 2021, and also
11 recommended recovery of trailing rate case expenses incurred between the date of the
12 PFD filing and when the Commission’s decision becomes final. WOWSC has had to
13 incur significant additional rate case expenses due to the Commission remanding the
14 proceeding back to SOAH. WOWSC is aware that the rate case expenses incurred in
15 this rate appeal are significantly higher than the contested rate increase, but this
16 proceeding has been heavily litigated over the last three years and WOWSC has had to
17 engage in extensive discovery and motion practice, in addition to being required to
18 prepare two additional rounds of testimony due to the Commission’s remand.

19 **Q. PLEASE DESCRIBE THE PROCESS YOU UNDERTOOK TO REACH YOUR**
20 **CONCLUSION.**

21 A. Based on my experience and education, and following a thorough and critical review
22 of all of the relevant information, I concluded that the reasonable and necessary rate
23 case expenses for legal services as of January 31, 2023, is \$478,184.08. A rate case
24 expense summary sheet detailing each expense by attorney and consultant is attached

1 to my fifth supplemental testimony as Fifth Supplemental Attachment
2 JLM-1. I recommend that the Commission find this amount to be the reasonable and
3 necessary reimbursable legal and consultant rate case expenses for WOWSC in this
4 proceeding. I also recommend that the Commission allow WOWSC to recover the rate
5 case expenses of its consultant, Grant Rabon and his associates, of NewGen Strategies
6 & Solutions (“NewGen”), pursuant 16 Texas Administrative Code (“TAC”) § 24.44.

7 WOWSC engaged the services of Lloyd Gosselink in May 2020. I have
8 directed the work performed by Lloyd Gosselink employees on behalf of WOWSC
9 since that time. I have reviewed the billings of Lloyd Gosselink submitted to WOWSC
10 for legal services from June 1, 2020, through January 31, 2023, in connection with
11 WOWSC defending the Rate Appeal. I affirm that those billings accurately reflect the
12 time spent and expenditures incurred by Lloyd Gosselink on WOWSC’s behalf. Those
13 billings were accurately calculated before they were tendered and did not include any
14 double billing. None of the charges billed to WOWSC have been recovered through
15 reimbursement for other expenses. The expenses charged were associated with the
16 review and defense of the Rate Appeal and were necessary to advise WOWSC and to
17 accomplish tasks in the rate proceeding.

18 For the period of May 23, 2022, through January 31, 2023, Lloyd Gosselink
19 billed \$85,662 for legal services in connection with WOWSC’s proposed rate increase.
20 This figure includes legal fees and expenses. The fees and expenses were necessary
21 for the legal representation of WOWSC. The legal work included advising WOWSC,
22 review of the Rate Appeal, preparation of pleadings, review and preparation of
23 evidentiary exhibits, preparation of discovery, and preparation of testimony, and other
24 trailing expenses.

1 The hourly rates for attorneys of \$270–\$330, and for the paralegals of
2 \$140-\$150, upon which the billings are based, are generally lower than the same hourly
3 rates charged other clients for comparable services during the same time frame. My
4 hourly rate for this proceeding is significantly lower than my normal hourly rate
5 charged to similar clients. Additionally, our firm’s hourly rates are at the lower end of
6 the range compared to the rates charged by other lawyers with similar experience
7 providing similar services. To further minimize expenses, I used associates and
8 paralegals where possible because of their lower billing rates. In assigning the tasks to
9 attorneys, I ensured that the attorneys did not duplicate the work of one another. The
10 hours spent performing the tasks assigned to Lloyd Gosselink were necessary to
11 complete those tasks in a professional manner and on a timely basis. My many years
12 of experience participating in utility rate cases aid in our efforts to keep rate case
13 expenses reasonable.

14 The invoices submitted by Lloyd Gosselink include a description of services
15 performed and time expended on each activity. The invoices dated from
16 June 13, 2022 through February 7, 2023, for this proceeding are attached to my fifth
17 supplemental testimony as Fifth Supplemental Attachment JLM-2. Lloyd Gosselink
18 has documented all charges with time sheets, invoices, and records.

19 Neither Lloyd Gosselink nor any consultants for WOWSC have charged for
20 luxury items, including first-class airfare, limousine service, entertainment, or
21 alcoholic beverages. No meals were charged in excess of \$25 per person, and no
22 individual billed for more than 12 hours per day. The documentation in this case is
23 similar to that provided in many previous rate cases before the Commission.

1 The current amount requested for legal expenses of \$478,184.08 is reasonable
2 given the complexity of this case and comparable to the rate case expenses awarded in
3 other rate appeals.¹ WOWSC has incurred significant additional attorney fees
4 associated with this proceeding due to the Commission’s remand to SOAH, including
5 briefing, preparation of pleadings defending WOWSC and myself from abusive
6 allegations of misconduct, preparation of several rounds of testimony, and drafting
7 other responsive pleadings. Additionally, parties are expected to participate in another
8 hearing on the merits and, possibly, additional briefing. WOWSC will continue to
9 incur legal expenses related to this rate appeal until the Commission’s Order is final
10 and unappealable.

11 **Q. DOES THE RATE APPEAL INCLUDE ANY NOVEL OR DIFFICULT ISSUES**
12 **THAT A TYPICAL WATER UTILITY APPLICATION DOES NOT**
13 **INCLUDE?**

14 A. Yes. In my direct testimony, I discuss the variety of novel, difficult, and complex
15 issues. These issues have continued to arise throughout this proceeding. WOWSC
16 faces a contentious appellant and has had to engage in significant motion practice and
17 discovery throughout this appeal. And, as discussed above, this proceeding was
18 remanded to SOAH for additional analysis, which has caused WOWSC to incur
19 additional legal fees.

¹ *Ratepayers Appeal of the Decision by Bear Creek Special Utility District to Change Rates*, Docket No. 49351, Order on Rehearing at 3, Findings of Fact No. 56 (Nov. 19, 2021) (Bear Creek Order) awarding \$409k in rate case expenses.

1 **Q. ARE THE LEGAL EXPENSES THAT WOWSC IS SEEKING TO RECOVER**
2 **JUST, REASONABLE, NECESSARY, AND IN THE PUBLIC INTEREST?**
3 **PLEASE EXPLAIN.**

4 A. Yes. The legal expenses that WOWSC seeks to recover are just, reasonable, necessary,
5 and in the public interest. Recovery of reasonable and necessary legal expenses
6 associated with preparation and defense of a rate appeal and the associated proceeding
7 have long been recoverable, is allowed by Commission rule, and is authorized by
8 TWC § 13.043(e). For the reasons I mentioned above, it was reasonable and necessary
9 for WOWSC to seek legal advice and assistance in defending the Rate Appeal, the time
10 spent was reasonable and necessary, and the hourly rates charges are reasonable.

11 **Q. WAS IT REASONABLE AND NECESSARY FOR WOWSC TO INCUR**
12 **LEGAL EXPENSES TO PREPARE PREFILED DIRECT, REBUTTAL,**
13 **SUPPLEMENTAL DIRECT, AND SUPPLEMENTAL REBUTTAL**
14 **TESTIMONY?**

15 A. Yes. The Commission's rules at 16 TAC § 24.101(e) recognize the complexities that
16 may be involved in the preparation and defense of a Rate Appeal.

17 **Q. DID WOWSC INCUR ANY CONSULTANT EXPENSES IN THIS RATE**
18 **APPEAL?**

19 A. Yes. WOWSC incurred the expenses associated with the following experts: NewGen
20 Strategies & Solutions.

21 **Q. ARE THE CONSULTANT EXPENSES FOR NEWGEN INCURRED IN THIS**
22 **RATE APPEAL REASONABLE AND NECESSARY?**

23 A. Yes. For the period of October 1, 2022, through January 31, 2023, the expenses for
24 NewGen are \$6,405. Based on my years of experience working with utility consultants,

1 Mr. Rabon's hourly rate of \$260-\$310 and hourly rates of his associates, upon which
2 the billings are based, is comparable to rates charged by consultants with similar levels
3 of expertise and experience as Mr. Rabon. I have also reviewed the number of hours
4 Mr. Rabon and his associates have spent on the review, analysis, and testimony
5 regarding depreciation in this proceeding and on responding to discovery. In my
6 opinion, the amount of time spent is appropriate given the level of complexity of this
7 case. The NewGen invoice for services dated from October 1, 2022, through
8 January 31, 2023 for this proceeding are attached to my fifth supplemental testimony
9 as Fifth Supplemental Attachment JLM-3. The amount requested for NewGen's
10 expenses of \$18,732.50, as of the date of filing, is reasonable.

11 **Q. DOES WOWSC INTEND TO RECOVER ITS RATE APPEAL EXPENSES?**

12 A. Yes, as I have explained in my direct testimony.

13 **IV. CONCLUSION**

14 **Q. DOES THIS CONCLUDE YOUR FIFTH SUPPLEMENTAL DIRECT**
15 **TESTIMONY AT THIS TIME?**

16 A. Yes, it does. I reserve the right to supplement the expenses, make corrections,
17 revisions, or deletions at the Commission's direction.

**Docket No. 50788
Windermere Oaks Water Supply Corporation
Rate Case Expenses**

LGRT	Date	LGRT Inv. #	LGRT Fees	Non-Consultant Disbursements	LGRT INVOICE ACTUAL TOTAL	NOTES
	6/26/2020	97511347	\$ 7,674.00		\$ 7,674.00	Provided in Direct Testimony of Jamie L. Mauldin
	7/8/2020	97512426	\$ 1,275.00		\$ 1,275.00	Provided in Direct Testimony of Jamie L. Mauldin
	8/26/2020	97513856	\$ 5,110.50		\$ 5,110.50	Provided in Direct Testimony of Jamie L. Mauldin
	10/22/2020	97515385	\$ 68,535.00	\$ 66.80	\$ 68,601.80	Provided in Direct Testimony of Jamie L. Mauldin
	11/12/2020	97516427	\$ 8,820.00		\$ 8,820.00	Provided in Direct Testimony of Jamie L. Mauldin
	12/22/2020	97518766	\$ 29,870.00	\$ 55.52	\$ 29,925.52	Provided in Direct Testimony of Jamie L. Mauldin
	1/11/2021	97519431	\$ 4,213.00	\$ -	\$ 4,213.00	Provided in Direct Testimony of Jamie L. Mauldin
	2/9/2021	97519807	\$ 11,650.00	\$ -	\$ 11,650.00	Provided in Direct Testimony of Jamie L. Mauldin
	3/8/2021	97520641	\$ 11,440.50	\$ 36.80	\$ 11,477.30	Provided in Direct Testimony of Jamie L. Mauldin
	4/13/2021	97521461	\$ 26,576.50	\$ 1,296.75	\$ 27,873.25	Provided in First Supplemental Direct Testimony of Jamie L. Mauldin
	5/13/2021	97522524	\$ 14,404.00	\$ 5.00	\$ 14,409.00	Provided in First Supplemental Direct Testimony of Jamie L. Mauldin
	6/2/2021	97522723	\$ 41,117.00	\$ -	\$ 41,117.00	Provided in First Supplemental Direct Testimony of Jamie L. Mauldin
	6/22/2021	97523260	\$ -	\$ 0.20	\$ 0.20	Provided in Second Supplemental Testimony of Jamie L. Mauldin
	7/14/2021	97524054	\$ 36,773.00	\$ 871.18	\$ 37,644.18	Provided in Second Supplemental Testimony of Jamie L. Mauldin
	8/11/2021	97524965	\$ 1,913.00	\$ 265.40	\$ 2,178.40	Provided in Second Supplemental Testimony of Jamie L. Mauldin
	9/13/2021	97525699	\$ 135.50	\$ -	\$ 135.50	Provided in Second Supplemental Testimony of Jamie L. Mauldin
	10/12/2021	97526506	\$ 81.00	\$ -	\$ 81.00	Provided in Second Supplemental Testimony of Jamie L. Mauldin
	12/14/2021	97527557	\$ 27,634.00	\$ 856.96	\$ 28,490.96	Provided in Third Supplemental Testimony of Jamie L. Mauldin
	12/28/2021	97527992	\$ 24,136.00	\$ 8,586.92	\$ 32,722.92	Provided in Third Supplemental Testimony of Jamie L. Mauldin
1/27/2022	97528271	\$ 15,803.00	\$ 497.00	\$ 16,300.00	Provided in Fourth Supplemental Testimony of Jamie L. Mauldin	
2/10/2022	97529009	\$ 16,996.00	\$ 23.00	\$ 17,019.00	Provided in Fourth Supplemental Testimony of Jamie L. Mauldin	
3/8/2022	97529849	\$ 1,414.00	\$ 49.60	\$ 1,463.60	Provided in Fourth Supplemental Testimony of Jamie L. Mauldin	
4/14/2022	97531067	\$ 392.00	\$ 49.45	\$ 441.45	Provided in Fourth Supplemental Testimony of Jamie L. Mauldin	
5/24/2022	97532228	\$ 5,166.00		\$ 5,166.00	Provided in Fourth Supplemental Testimony of Jamie L. Mauldin	
6/13/2022	97532541	\$ 4,088.00		\$ 4,088.00	Provided in Fifth Supplemental Testimony of Jamie L. Mauldin	
7/12/2022	97533223	\$ 4,592.00		\$ 4,592.00	Provided in Fifth Supplemental Testimony of Jamie L. Mauldin	
8/9/2022	97533946	\$ 2,758.00		\$ 2,758.00	Provided in Fifth Supplemental Testimony of Jamie L. Mauldin	
9/12/2022	97534700	\$ 350.00		\$ 350.00	Provided in Fifth Supplemental Testimony of Jamie L. Mauldin	
10/17/2022	97535419	\$ 616.00		\$ 616.00	Provided in Fifth Supplemental Testimony of Jamie L. Mauldin	
11/15/2022	97536174	\$ 6,218.00		\$ 10,143.00	Provided in Fifth Supplemental Testimony of Jamie L. Mauldin	
12/27/2022	97537121	\$ 19,112.00		\$ 19,372.00	Provided in Fifth Supplemental Testimony of Jamie L. Mauldin	
1/12/2023	97538168	\$ 19,999.00		\$ 20,259.00	Provided in Fifth Supplemental Testimony of Jamie L. Mauldin	
2/7/2023	97538496	\$ 23,484.00		\$ 23,484.00	Provided in Fifth Supplemental Testimony of Jamie L. Mauldin	
		Totals	\$ 442,346.00	\$ 12,660.58	\$ 459,451.58	
					LGRT TOTAL	\$ 459,451.58

NewGen	Date	NewGen Inv. #	NewGen Fees		NewGen INVOICE ACTUAL TOTAL	NOTES
	5/31/2021	11372	\$ 4,000.00		\$ 4,000.00	Provided in First Supplemental Direct Testimony of Jamie L. Mauldin
	6/30/2021	11542	\$ 5,390.00		\$ 5,390.00	Provided in Second Supplemental Testimony of Jamie L. Mauldin
	11/30/2021	12260	\$ 1,687.50		\$ 1,687.50	Provided in Third Supplemental Testimony of Jamie L. Mauldin
	12/28/2021	12395	\$ 750.00		\$ 750.00	Provided in Third Supplemental Testimony of Jamie L. Mauldin
	1/31/2022	12527	\$ 500.00		\$ 500.00	Provided in Fourth Supplemental Testimony of Jamie L. Mauldin
	10/31/2022	14633	\$ 3,925.00		\$ 3,925.00	Provided in Fifth Supplemental Testimony of Jamie L. Mauldin
	11/20/2022	14818	\$ 260.00		\$ 260.00	Provided in Fifth Supplemental Testimony of Jamie L. Mauldin
	12/31/2022	14998	\$ 260.00		\$ 260.00	Provided in Fifth Supplemental Testimony of Jamie L. Mauldin
	1/31/2023	15206	\$ 1,960.00		\$ 1,960.00	Provided in Fifth Supplemental Testimony of Jamie L. Mauldin
		Totals	\$ 18,732.50		\$ 18,732.50	
					NewGen TOTAL	\$ 18,732.50

TOTAL RATE CASE EXPENSES \$ 478,184.08

June 13, 2022

Windermere Oaks Water Supply Corporation
Attn Joe Gimenez
Board President
424 Coventry Road
Spicewood, TX 78669

Invoice: 97532541
Client: 3870
Matter: 4
Billing Attorney: JLM
Tax ID # 74-2308445

INVOICE SUMMARY

For professional services and disbursements rendered through May 31, 2022:

RE: PUC Rate Appeal

Professional Services	\$ 4,088.00
Total Disbursements	<u> \$.00</u>
TOTAL THIS INVOICE	\$ 4,088.00

Lloyd Gosselink Rochelle & Townsend, P.C.

Windermere Oaks Water Supply Corporation
PUC Rate Appeal
I.D.3870-4-JLM

June 13, 2022
Invoice: 97532541

PROFESSIONAL SERVICES RENDERED

Date	Atty	Description Of Services Rendered	Hours
5/23/22	JLM	Continue drafting replies to exceptions; work on rate case expense supplemental testimony (briefing/testimony).	3.50
5/24/22	JLM	Complete draft of reply to exceptions; review rate case expenses (briefing).	4.50
5/24/22	PEM	Review and revise WOWSC's Reply to Exceptions, Fourth Supplemental Testimony of J. Mauldin; file management (Administration/Case Management).	2.30
5/25/22	JLM	Finalize reply to exceptions; finalize fourth supplemental testimony; review Staff and Ratepayer Replies to Exceptions (administration).	3.20
5/25/22	PEM	Review and revise, finalize, file and serve WOWSC's Reply to Exceptions, Fourth Supplemental Testimony of J. Mauldin, including rate case expenses, and Motion to Admit Evidence; file management (Administration/Case Management).	4.50

TOTAL PROFESSIONAL SERVICES**\$ 4,088.00****SUMMARY OF PROFESSIONAL SERVICES**

Name	Staff Level	Hours	Rate	Total
Jamie L Mauldin	Principal	11.20	280.00	3,136.00
Patricia E Martinez	Paralegal	6.80	140.00	952.00
TOTALS		18.00		\$ 4,088.00

TOTAL THIS INVOICE**\$ 4,088.00**

July 12, 2022

Windermere Oaks Water Supply Corporation
Attn Joe Gimenez
Board President
424 Coventry Road
Spicewood, TX 78669

Invoice: 97533223
Client: 3870
Matter: 4
Billing Attorney: JLM
Tax ID # 74-2308445

INVOICE SUMMARY

For professional services and disbursements rendered through June 30, 2022:

RE: PUC Rate Appeal

Professional Services	\$ 4,592.00
Total Disbursements	<u> \$.00</u>
TOTAL THIS INVOICE	\$ 4,592.00

Lloyd Gosselink Rochelle & Townsend, P.C.

Windermere Oaks Water Supply Corporation
PUC Rate Appeal
I.D.3870-4-JLM

July 12, 2022
Invoice: 97533223

PROFESSIONAL SERVICES RENDERED

Date	Atty	Description Of Services Rendered	Hours
6/02/22	JLM	Analyze Ratepayers' filings.	.50
6/02/22	PEM	Review Ratepayers' Response to WOWSC Motion to Admit Evidence; calendar response deadline; file management (Administration/Case Management).	.20
6/03/22	JLM	Analyze joint request for oral argument; correspondence regarding same.	.40
6/06/22	JLM	Review Exceptions Letter filed by ALJs; review Amicus letter; call and correspondence regarding same (admin).	1.50
6/08/22	JLM	Draft Reply to Ratepayers' Response to Motion to Admit Evidence (Administration).	4.00
6/09/22	JLM	Finalize Reply to Ratepayers' Response to Motion to Admit Evidence (Administration).	.30
6/10/22	JLM	Review Ratepayer filings; begin preparing for oral argument (Administration)	.90
6/14/22	JLM	Prepare for Open Meeting; correspondence regarding same (Administration).	.70
6/15/22	JLM	Prepare for open meeting; conference with J. Giminez regarding same (Administration).	2.50
6/16/22	JLM	Prepare for and attend Open Meeting for discussion on PFD; follow-up calls and correspondence (Administration).	2.50
6/20/22	JLM	Call with G. Rabon regarding next steps in case due to remand (Administration).	.20
6/23/22	JLM	Call with PUC Staff regarding Commission agenda; draft follow-up correspondence to client regarding same (Administration).	.60
6/24/22	JLM	Analyze draft order remanding proceeding to SOAH; correspondence regarding same (Administration)	.50
6/29/22	JLM	Analyze revised remand order; follow-up correspondence to client and consultant regarding same (Administration).	.60
6/30/22	JLM	Research whether PUC has primary or exclusive appellate jurisdiction; send executed Order on Remand to client (Administration).	1.10

TOTAL PROFESSIONAL SERVICES**\$ 4,592.00****SUMMARY OF PROFESSIONAL SERVICES**

Name	Staff Level	Hours	Rate	Total
Jamie L Mauldin	Principal	16.30	280.00	4,564.00
Patricia E Martinez	Paralegal	.20	140.00	28.00
TOTALS		16.50		\$ 4,592.00

TOTAL THIS INVOICE**\$ 4,592.00**

August 9, 2022

Windermere Oaks Water Supply Corporation
Attn Joe Gimenez
Board President
424 Coventry Road
Spicewood, TX 78669

Invoice: 97533946
Client: 3870
Matter: 4
Billing Attorney: JLM
Tax ID # 74-2308445

INVOICE SUMMARY

For professional services and disbursements rendered through July 31, 2022:

RE: PUC Rate Appeal

Professional Services	\$ 2,758.00
Total Disbursements	<u> \$.00</u>
TOTAL THIS INVOICE	\$ 2,758.00

Lloyd Gosselink Rochelle & Townsend, P.C.

Windermere Oaks Water Supply Corporation
PUC Rate Appeal
I.D.3870-4-JLM

August 9, 2022
Invoice: 97533946

PROFESSIONAL SERVICES RENDERED

Date	Atty	Description Of Services Rendered	Hours
6/06/22	PEM	Review SOAH Exceptions letter; file management (Administration/Case Management).	.10
6/07/22	PEM	Review TRWA Letter in Support of the PFD in Docket No. 50788; file management (Administration/Case Management).	.10
6/09/22	PEM	Review and revise WOWSC's Reply to Ratepayers Response to Motion to Admit Evidence in Docket No. 50788; coordinate filing and service of same; file management (Administration/Case Management).	.90
7/01/22	JLM	Confer with co-counsel on status of PUC case and other client dockets and consider next steps for PUC rate appeal (Administration).	2.00
7/07/22	JLM	Analyze SOAH Order No. 19; work on response; correspondence to client setting up discussion for response (Administration).	.50
7/07/22	PEM	Review SOAH Order No. 19; calendar deadlines; file management (Administration/Case Management).	.10
7/11/22	JLM	Call with J. Giminez, M. Nelson, and G. Rabon to discuss response to SOAH Order No. 19; review record to determine next steps and strategy (Administration).	3.00
7/12/22	JLM	Call with G. Rabon regarding response to SOAH Order No. 19; work on response (Administration).	1.30
7/13/22	JLM	Analyze potential briefing for Response to SOAH Order No. 19 (briefing).	.40
7/18/22	JLM	Call with M. Lander regarding remand order and response to SOAH Order No. 19 (Administration).	.20
7/27/22	PEM	Draft shell response to SOAH Order No 19; file management (Administration/Case Management).	.40
7/28/22	JLM	Work on Response to Order No. 19 (Administration).	1.00
7/28/22	PEM	Review and revise response to SOAH Order No. 19 in Docket No. 50788; file management (Administration/Case Management).	.30
7/29/22	JLM	Revise Response to Order No. 19; finalize and file (Administration).	.50

TOTAL PROFESSIONAL SERVICES**\$ 2,758.00****SUMMARY OF PROFESSIONAL SERVICES**

Name	Staff Level	Hours	Rate	Total
Jamie L Mauldin	Principal	8.90	280.00	2,492.00
Patricia E Martinez	Paralegal	1.90	140.00	266.00
TOTALS		10.80		\$ 2,758.00

TOTAL THIS INVOICE**\$ 2,758.00**

September 12, 2022

Windermere Oaks Water Supply Corporation
Attn Joe Gimenez
Board President
424 Coventry Road
Spicewood, TX 78669

Invoice: 97534700
Client: 3870
Matter: 4
Billing Attorney: JLM
Tax ID # 74-2308445

INVOICE SUMMARY

For professional services and disbursements rendered through August 31, 2022:

RE: PUC Rate Appeal

Professional Services	\$ 350.00
Total Disbursements	<u> \$.00</u>
TOTAL THIS INVOICE	\$ 350.00

Lloyd Gosselink Rochelle & Townsend, P.C.

Windermere Oaks Water Supply Corporation
PUC Rate Appeal
I.D.3870-4-JLM

September 12, 2022
Invoice: 97534700

PROFESSIONAL SERVICES RENDERED

Date	Atty	Description Of Services Rendered	Hours
8/05/22	PAE	Review Order No. 20 in Docket No. 50788; calendar deadline; file management (Admin.)	.10
8/12/22	PAE	Review Ratepayers Motion to Postpone Prehearing Conference in Docket No. 50788; email to J. Mauldin regarding same; file management.	.10
8/15/22	PAE	Review SOAH Order No. 21 in Docket No. 50788; email same to J. Mauldin; calendar deadlines; file management.	.10
8/20/22	JLM	Correspondence with Ratepayers counsel for alternate hearing dates (administration).	.20
8/22/22	PAE	Review Order Granting Motion for Continuance Without a Future Setting in Docket No. 50788; calendar deadlines; file management.	.30
8/24/22	PAE	Review Submission of Proposed Dates in Docket No. 50788; file management (Admin.).	.10
8/29/22	JLM	Confer with opposing counsel on dates for procedural schedule; provide status update to client (administration).	.70

TOTAL PROFESSIONAL SERVICES**\$ 350.00****SUMMARY OF PROFESSIONAL SERVICES**

Name	Staff Level	Hours	Rate	Total
Jamie L Mauldin	Principal	.90	280.00	252.00
Patricia A Estrada	Paralegal	.70	140.00	98.00
TOTALS		1.60		\$ 350.00

TOTAL THIS INVOICE**\$ 350.00**

October 17, 2022

Windermere Oaks Water Supply Corporation
Attn Joe Gimenez
Board President
424 Coventry Road
Spicewood, TX 78669

Invoice: 97535419
Client: 3870
Matter: 4
Billing Attorney: JLM
Tax ID # 74-2308445

INVOICE SUMMARY

For professional services and disbursements rendered through September 30, 2022:

RE: PUC Rate Appeal

Professional Services	\$ 616.00
Total Disbursements	<u> \$.00</u>
TOTAL THIS INVOICE	\$ 616.00

Lloyd Gosselink Rochelle & Townsend, P.C.

Windermere Oaks Water Supply Corporation
PUC Rate Appeal
I.D.3870-4-JLM

October 17, 2022
Invoice: 97535419

PROFESSIONAL SERVICES RENDERED

Date	Atty	Description Of Services Rendered	Hours
9/19/22	JLM	Prepare for prehearing conference; participate in prehearing conference; correspondence to client regarding same (Administration).	1.70
9/21/22	JLM	Work on procedural schedule (Administration).	.40
9/26/22	PAE	Review SOAH Order No. 23; calendar deadlines; file management; (Administration).	.20

TOTAL PROFESSIONAL SERVICES

\$ 616.00

SUMMARY OF PROFESSIONAL SERVICES

Name	Staff Level	Hours	Rate	Total
Jamie L Mauldin	Principal	2.10	280.00	588.00
Patricia A Estrada	Paralegal	.20	140.00	28.00
TOTALS		2.30		\$ 616.00

TOTAL THIS INVOICE

\$ 616.00

November 15, 2022

Windermere Oaks Water Supply Corporation
Attn Joe Gimenez
Board President
424 Coventry Road
Spicewood, TX 78669

Invoice: 97536174
Client: 3870
Matter: 4
Billing Attorney: JLM
Tax ID # 74-2308445

INVOICE SUMMARY

For professional services and disbursements rendered through October 31, 2022:

RE: PUC Rate Appeal

Professional Services	\$ 6,218.00
Total Disbursements	<u>\$ 3,925.00</u>
TOTAL THIS INVOICE	\$ 10,143.00

Lloyd Gosselink Rochelle & Townsend, P.C.

Windermere Oaks Water Supply Corporation
PUC Rate Appeal
I.D.3870-4-JLM

November 15, 2022
Invoice: 97536174

PROFESSIONAL SERVICES RENDERED

Date	Atty	Description Of Services Rendered	Hours
10/04/22	JLM	Prepare for call with G. Rabon regarding supplemental direct testimony; call regarding same (Testimony).	.90
10/05/22	JLM	Attend to correspondence for supplemental direct testimony (Administration).	.30
10/17/22	PAE	Review Ratepayers filing; file management.	.10
10/18/22	PAE	Review SOAH Order No. 24; calendar deadlines; file management (Administration).	.20
10/20/22	JLM	Review Staff's RFIs; review Staff and Ratepayer pleading for excluded evidence; work on responses to same (Administration; Discovery).	1.40
10/20/22	AMB	Review request for information served by Commission Staff and confirm deadlines calendared for Docket No. 50788. (Administration/Case Management)	.40
10/20/22	PAE	Review Ratepayers exhibits in Docket No. 50788. (Administration/Case Management)	.30
10/23/22	JLM	Call with G. Rabon regarding draft testimony and RFI responses; correspondence re same (Admin; Cost Allocation).	1.10
10/24/22	PAE	Research attachments for testimony. (Administration/Case Management)	.30
10/26/22	JLM	Calls and correspondence related to Staff's RFIs and Supplemental Direct Testimony (Administration; Discovery; Testimony).	1.00
10/26/22	RAA	Research PUC rules and Texas Rules of Evidence re published material in written testimony. (Testimony)	1.70
10/27/22	JLM	Call with G. Rabon regarding Supplemental Direct Testimony; review draft testimony; revise same (Administration; Cost Allocation).	2.00
10/27/22	RAA	Research PUC rules and Texas Rules of Evidence re published material in written testimony; review ratepayer petition. (Administration)	2.10
10/28/22	JLM	Finalize Supplemental Direct Testimony; attend to correspondence regarding same (Administration; Cost allocation).	1.20
10/28/22	PAE	Review and revise supplemental testimony of G. Rabon in Docket No. 50788; prepare attachments to same; finalize, file and serve same; file management.	1.50
10/31/22	JLM	Review Ratepayers and Staff's Amended regarding considerations; confer with R. Arnett regarding same (administration).	3.50
10/31/22	RAA	Work on response to Ratepayer's and Staff's Amended Agreed Motion to Reconsider Evidentiary Rulings; discuss Response with JLM (Administrative/Rate Case Expenses).	5.80
10/31/22	PAE	Review Ratepayers exhibits and hearing transcript in Docket No. 50788. (Administration/Case Management)	.30

TOTAL PROFESSIONAL SERVICES**\$ 6,218.00****SUMMARY OF PROFESSIONAL SERVICES**

Lloyd Gosselink Rochelle & Townsend, P.C.

Windermere Oaks Water Supply Corporation
PUC Rate Appeal
I.D.3870-4-JLM

November 15, 2022
Invoice: 97536174

Name	Staff Level	Hours	Rate	Total
Jamie L Mauldin	Principal	11.40	280.00	3,192.00
Rick X Arnett	Associate	9.60	270.00	2,592.00
Patricia A Estrada	Paralegal	2.70	140.00	378.00
Amanda M Benavides	Paralegal	.40	140.00	56.00
TOTALS		24.10		\$ 6,218.00

DISBURSEMENTS

Date	Description	Amount
10/31/22	NewGen Strategies an Voucher # - 000115175 NewGen Strategies and Solutions, LLC, Consultant Services, Professional services through October 2022 regarding Windermere Oaks WSC Rate Appeal, 10/31/2022	3,925.00

TOTAL DISBURSEMENTS **\$ 3,925.00**

TOTAL THIS INVOICE **\$ 10,143.00**



275 W.Campbell Road, Suite 440
 Richardson, TX 75080
 Tel: 972-680-2000 Fax: 972-680-2007

Invoice

Invoice Date: Oct 31, 2022
Invoice Num: 14633
Billing Through: Oct 31, 2022

Lloyd Gosselink Rochelle & Townsend, P.C.
 816 Congress Avenue
 Suite 1900
 Austin, TX 78701

LG- Windermere Oaks WSC Rate Appeal (LG- Windermere Oaks WSC Rate Appeal TX-RLS2111:) - Managed by (Rabon, Grant)

Contract Amount: \$20,000.00	Amount Billed: \$16,252.50	Amount Remaining: \$3,747.50
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Professional Services

<u>Employee</u>	<u>Description</u>	<u>Hours</u>	<u>Rate</u>	<u>Amount</u>
Christopher D. Ekrut	Professional Fees	0.50	\$310.00	\$155.00
Grant S. Rabon	Professional Fees	14.50	\$260.00	\$3,770.00
Total Service Amount:				\$3,925.00
Amount Due This Invoice:				\$3,925.00

This invoice is due on 11/30/2022

Account Summary

Services BTD	Expenses BTD	Last Inv Num	Last Inv Date	Last Inv Amt	Last Pay Amt	Prev Unpaid Amt
\$16,252.50	\$0.00	12527	1/31/2022	\$500.00	\$0.00	\$12,327.50

Time Detail and Notes Follow on Next Page

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Economics | **Strategy** | **Stakeholders** | **Sustainability**

www.newgenstrategies.net



275 W.Campbell Road, Suite 440
 Richardson, TX 75080
 Tel: 972-680-2000 Fax: 972-680-2007

Lloyd Gosselink Rochelle & Townsend, P.C.
 816 Congress Avenue
 Suite 1900
 Austin, TX 78701

Invoice

Invoice Date: Oct 31, 2022
Invoice Num: 14633
Billing Through: Oct 31, 2022

Date	Name	Duration	Notes
Project (Name) - LG- Windermere Oaks WSC Rate Appeal TX-RLS2111: (LG- Windermere Oaks WSC Rate Appeal)			
Ekrut, Christopher			
10/14/2022	Christopher D. Ekrut	0.25	QA/QC of Rabon Testimony
10/27/2022	Christopher D. Ekrut	0.25	Testimony Discussions with Grant / Review of Testimony
Total Ekrut, Christopher:		0.50	
Rabon, Grant			
10/14/2022	Grant S. Rabon	8.00	review issues, data, and develop testimony
10/25/2022	Grant S. Rabon	2.00	revise testimony
10/27/2022	Grant S. Rabon	4.50	revise draft testimony incorporating results from analysis
Total Rabon, Grant:		14.50	
Total LG- Windermere Oaks WSC Rate Appeal TX-RLS2111: - LG- Windermere Oaks WSC Rate Appeal :		15.00	

December 27, 2022

Windermere Oaks Water Supply Corporation
Attn Joe Gimenez
Board President
424 Coventry Road
Spicewood, TX 78669

Invoice: 97537121
Client: 3870
Matter: 4
Billing Attorney: JLM
Tax ID # 74-2308445

INVOICE SUMMARY

For professional services and disbursements rendered through November 30, 2022:

RE: PUC Rate Appeal

Professional Services	\$ 19,112.00
Total Disbursements	<u>\$ 260.00</u>
TOTAL THIS INVOICE	\$ 19,372.00

Lloyd Gosselink Rochelle & Townsend, P.C.

Windermere Oaks Water Supply Corporation
PUC Rate Appeal
I.D.3870-4-JLM

December 27, 2022
Invoice: 97537121

PROFESSIONAL SERVICES RENDERED

Date	Atty	Description Of Services Rendered	Hours
11/01/22	RAA	Draft Response to Ratepayer's Motion to Reconsider Evidentiary Rulings. (Administration)	7.40
11/01/22	PAE	Review filed for Offers of Proof in Docket No. 50788; discuss same with R. Arnett. (Administration).	.20
11/02/22	RAA	Draft Response to Ratepayer's Motion to Reconsider Evidentiary Rulings. (Administration)	8.50
11/03/22	RAA	Draft Response to Ratepayers' and Staff Motion to Reconsider Evidentiary Rulings. (Administration)	7.90
11/03/22	PAE	Review file and transcript for reference to Double F lawsuit and other exhibits; discussion with R. Arnett regarding same. (Administration)	.40
11/04/22	JLM	Review Ratepayers 4th RFIs; attend to correspondence; review draft response to Staff's 5th RFIs; attend to correspondence. (Discovery)	.90
11/04/22	RAA	Draft Reply to Ratepayer' and Staff's Motion to Reconsider Evidentiary Rulings. (Administration)	1.50
11/04/22	PAE	Review Ratepayers' Fourth RFI; file management; coordinate draft shell response; review orders in docket regarding discovery deadlines; calculate and calendar deadlines. (Administration/Case Management)	.30
11/05/22	JLM	Attend to correspondence related to RFI responses. (Discovery)	.40
11/07/22	JLM	Meeting with WOWSC and G. Rabon to discuss RFI Responses; begin revising draft Response to Motion to Reintroduce Excluded Evidence; review Ratepayers 4th RFIs for possible objections. (Administration; Discovery)	3.50
11/07/22	AMB	Work on formatting; accept redlines; and finalize WOWSC's Responses to Commission Staff's 5th Request for Information for Docket No. 50788. (Administration/Case Management)	2.00
11/08/22	JLM	Continue revising Response to Motion to Reintroduce Excluded Evidence. (Administration)	1.10
11/08/22	AMB	E-file and serve WOWSC's Response to Commission Staff's Request for Information for Docket No. 50788. (Administration/Case Management)	.40
11/09/22	JLM	Meeting with R. Arnett to discuss Response to Motion to Reintroduce Evidence; revise same; call with J. Giminez regarding responses to Ratepayers 4th RFIs. (administration; Discovery)	2.30
11/09/22	RAA	Confer with J. Mauldin; Review Ratepayers' Fourth RFI, draft Objections to RFI; draft Response to Ratepayers' Request to Reconsider Evidentiary Rulings; draft Motion to Admit Ratepayers Exhibit 13. (Administration)	6.80
11/09/22	AMB	Work on reviewing and revising WOWSC's Response to Ratepayers and Staff's Motion for Docket No. 50788. (Administration/Case Management)	3.30
11/09/22	PAE	Review file for Ratepayers' admitted exhibits (Administration).	.30
11/10/22	JLM	Revise and finalize Response to Motion to Readmit Evidence; review draft Objections to Staff's 4th RFIs; review Ratepayers Objections to Supplemental	2.50

Lloyd Gosselink Rochelle & Townsend, P.C.

Windermere Oaks Water Supply Corporation
PUC Rate Appeal
I.D.3870-4-JLM

December 27, 2022
Invoice: 97537121

Date	Atty	Description Of Services Rendered	Hours
		Direct Testimony of G. Rabon; correspondence. (Discovery; Testimony; Administration)	
11/10/22	RAA	Draft Response to Ratepayers' and Staff's Motion to Reconsider Evidentiary Rulings, Objections to Ratepayers' Fourth RFI. (Administration)	2.40
11/10/22	AMB	Work on corresponding with R. Arnett and J. Mauldin on editing; finalizing; e-file; and serve WOWSC's Response to Ratepayers and Staff's Motion for Docket No. 50788. (Administration/Case Management)	1.50
11/10/22	AMB	Work on editing and formatting WOWSC's Response to Ratepayers 4th Request for Information for Docket No. 50788. (Administration/Case Management)	.90
11/10/22	PAE	Review Ratepayers Objection to G. Rabon Supplemental Testimony; calculate and calendar response deadlines; file management (Administration).	.20
11/11/22	RAA	Draft Objection to Fourth RFI, Response to Objection to Grant Rabon's Supplemental Testimony. (Discovery)	.50
11/14/22	PAE	Review SOAH Order No. 25 Ruling on Motion to Reconsider Evidentiary Ruling and Motion to Strike in Docket No. 50788; file management; (Administration).	.10
11/15/22	RAA	Review Ratepayers' Fourth RFI. (Administration)	.50
11/16/22	JLM	Work on responses to Ratepayers 4th RFIs; correspondence and calls. (Discovery)	.90
11/16/22	RAA	Draft Response to Ratepayers' Fourth RFI, Statement of Confidentiality. (Discovery)	4.00
11/16/22	AMB	Work on reviewing and finalizing WOWSC's Responses to Ratepayers' Fourth Request for Information for Docket No. 50788. (Administration/Case Management)	1.10
11/17/22	RAA	Draft Response to Ratepayers' Fourth RFI. (Discovery)	4.10
11/17/22	AMB	Work on WOWSC's Response to Ratepayers' Fourth Request for Information; correspond with J. Mauldin and R. Arnett regarding WOWSC's Response to Ratepayers' Fourth Request for Information for Docket No. 50788. (Administration/Case Management)	6.10
11/18/22	JLM	Finalize Response to Ratepayers 4th RFIs (Discovery; Administration)	.90
11/18/22	RAA	Draft Statement of Confidentiality, Response to Ratepayers' Fourth RFI.	.50
11/18/22	AMB	Work on reviewing; finalize; e-file; serve; and save WOWSC's Response to Ratepayers' Fourth Request for Information for Docket No. 50788. (Administration/Case Management)	3.00
11/28/22	PAE	Review Staff's Sixth Request for Information to WOWSC in Docket No. 50788; calculate and calendar deadlines; coordinate shell response; file management (Administration).	.10
11/29/22	JLM	Review Staff's 6th RFIs; correspondence. (Discovery; Administration)	.60
11/29/22	AMB	Work on drafting shell for WOWSC's Response to Staff's Sixth Request for Information for Docket No. 50788. (Administration/Case Management)	.50

TOTAL PROFESSIONAL SERVICES

\$ 19,112.00

SUMMARY OF PROFESSIONAL SERVICES

Lloyd Gosselink Rochelle & Townsend, P.C.

Windermere Oaks Water Supply Corporation
PUC Rate Appeal
I.D.3870-4-JLM

December 27, 2022
Invoice: 97537121

Name	Staff Level	Hours	Rate	Total
Jamie L Mauldin	Principal	11.60	280.00	3,248.00
Jamie L Mauldin	Principal	1.50	310.00	465.00
Rick X Arnett	Associate	44.10	280.00	12,348.00
Patricia A Estrada	Paralegal	.90	140.00	126.00
Patricia A Estrada	Paralegal	.70	150.00	105.00
Amanda M Benavides	Paralegal	18.80	150.00	2,820.00
TOTALS		77.60		\$ 19,112.00

DISBURSEMENTS

Date	Description	Amount
11/30/22	NewGen Strategies an Voucher # - 000115575 NewGen Strategies and Solutions, LLC, Consultant Services, Professional services through November 2022 regarding Windermere Oaks WSC Rate Appeal, 11/30/2022	260.00

TOTAL DISBURSEMENTS **\$ 260.00**

TOTAL THIS INVOICE **\$ 19,372.00**



275 W.Campbell Road, Suite 440
 Richardson, TX 75080
 Tel: 972-680-2000 Fax: 972-680-2007

Invoice

Invoice Date: Nov 30, 2022
Invoice Num: 14818
Billing Through: Nov 30, 2022

Lloyd Gosselink Rochelle & Townsend, P.C.
 816 Congress Avenue
 Suite 1900
 Austin, TX 78701

LG- Windermere Oaks WSC Rate Appeal (LG- Windermere Oaks WSC Rate Appeal TX-RLS2111:) - Managed by (Rabon, Grant)

Contract Amount: \$20,000.00	Amount Billed: \$16,512.50	Amount Remaining: \$3,487.50
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Professional Services

<u>Employee</u>	<u>Description</u>	<u>Hours</u>	<u>Rate</u>	<u>Amount</u>
Grant S. Rabon	Professional Fees	1.00	\$260.00	\$260.00
Total Service Amount:				\$260.00
Amount Due This Invoice:				\$260.00

This invoice is due on 12/30/2022

Account Summary

Services BTD	Expenses BTD	Last Inv Num	Last Inv Date	Last Inv Amt	Last Pay Amt	Prev Unpaid Amt
\$16,512.50	\$0.00	14633	10/31/2022	\$3,925.00	\$0.00	\$16,252.50

Time Detail and Notes Follow on Next Page

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Economics | **Strategy** | **Stakeholders** | **Sustainability**

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275 W.Campbell Road, Suite 440
 Richardson, TX 75080
 Tel: 972-680-2000 Fax: 972-680-2007

Lloyd Gosselink Rochelle & Townsend, P.C.
 816 Congress Avenue
 Suite 1900
 Austin, TX 78701

Invoice

Invoice Date: Nov 30, 2022
Invoice Num: 14818
Billing Through: Nov 30, 2022

Date	Name	Duration	Notes
Project (Name) - LG- Windermere Oaks WSC Rate Appeal TX-RLS2111: (LG- Windermere Oaks WSC Rate Appeal)			
Rabon, Grant			
11/7/2022	Grant S. Rabon	1.00	call to review RFI with client and legal counsel
	Total Rabon, Grant:	1.00	
	Total LG- Windermere Oaks WSC Rate Appeal TX-RLS2111: - LG- Windermere Oaks WSC Rate Appeal :	1.00	

January 12, 2023

Windermere Oaks Water Supply Corporation
Attn Joe Gimenez
Board President
424 Coventry Road
Spicewood, TX 78669

Invoice: 97538168
Client: 3870
Matter: 4
Billing Attorney: JLM
Tax ID # 74-2308445

INVOICE SUMMARY

For professional services and disbursements rendered through December 31, 2022:

RE: PUC Rate Appeal

Professional Services	\$ 19,999.00
Total Disbursements	<u>\$ 260.00</u>
TOTAL THIS INVOICE	\$ 20,259.00

Lloyd Gosselink Rochelle & Townsend, P.C.

Windermere Oaks Water Supply Corporation
PUC Rate Appeal
I.D.3870-4-JLM

January 12, 2023
Invoice: 97538168

PROFESSIONAL SERVICES RENDERED

Date	Atty	Description Of Services Rendered	Hours
12/01/22	JEF	Review Ratepayers Supplemental testimony, confer with PUC regulatory team on analysis. (Administration)	.30
12/01/22	RAA	Review Ratepayers' Supplemental Testimony. (Administrative)	.20
12/01/22	AMB	Save Staff's 7th Request for Information to WOWSC; draft shell for response for Docket No. 50788. (Administration/Case Management)	.40
12/02/22	JLM	Call with WOWSC regarding RFI responses; review Ratepayer testimony; call to Staff regarding RFIs. (Administration)	1.70
12/02/22	RAA	Attend video conference with client; draft Objections to Ratepayers' Supplemental Direct Testimony; research PUC rules regarding motions to extend time. (Administrative)	4.20
12/02/22	PAE	Review Ratepayers' supplemental testimonies in Docket No. 50788; file management; (Administration).	.20
12/02/22	PAE	Review additional supplemental testimony; file management; (Administration).	.20
12/05/22	JLM	Correspondence related to objection to motion for extension of time.(Administration)	.20
12/05/22	RAA	Draft objections to Ratepayers' Supplemental Direct Testimony, Motion for Extension, Response to Staff's Sixth RFI. (Administrative)	7.50
12/05/22	PAE	Draft shell WOWSC Objection to Ratepayers Motion for Extension of Time in Docket No. 50788; file management; (Administration).	.80
12/06/22	JLM	Finalize objection to Ratepayers Motion; correspondence related to Staff 7th RFIs (Administration; Discovery)	1.30
12/06/22	JEF	Assist PUC regulatory team with citations from trial court. (Administration)	.20
12/06/22	RAA	Draft Objections to Ratepayers' Motion for Extension, Supplemental Direct Testimony of Robert Gaines, Supplemental Direct Testimony of Kathryn E. Allen; draft Response to Staff's Sixth RFI. (Administrative)	8.30
12/06/22	PAE	Review and revise WOWSC objection to Ratepayers Motion for Extension of Time; finalize, file and serve same; file management; (Administration).	1.30
12/07/22	JLM	Call with M. Nelson re Staff's 7th RFIs; correspondence. (Discovery)	.80
12/07/22	RAA	Draft Response to Staff's Sixth RFI, Objection to Kathryn E. Allen Supplemental Direct Testimony. (Administrative)	4.60
12/08/22	JLM	Correspondence related to Staff's 6th and 7th RFIs.(Discovery)	.90
12/08/22	AMB	Correspond with R. Arnett regarding WOWSC Response to Staff's Sixth Request for Information for Docket No. 50788. (Administration/Case Management)	.50
12/09/22	RAA	Draft Objection Kathryn Allen's Supplemental Direct Testimony; Response to Staff Sixth RFI (Administrative).	6.80
12/09/22	AMB	Prepare attachments and confidential attachments for WOWSC's Response to Staff's Sixth Request for Information for Docket No. 50788. (Administration/Case Management)	2.00
12/12/22	JLM	Finalize responses to Staff's 6th RFIs. (Administration; Discovery)	.40

Lloyd Gosselink Rochelle & Townsend, P.C.

Windermere Oaks Water Supply Corporation
PUC Rate Appeal
I.D.3870-4-JLM

January 12, 2023
Invoice: 97538168

Date	Atty	Description Of Services Rendered	Hours
12/12/22	RAA	Draft Objections to Kathryn Allen's Supplemental Direct Testimony, Robert Gaines' Supplemental Direct Testimony, Response to Staff's Sixth RFI, and Errata to Rebuttal Testimony of Mike Nelson (Administrative).	5.10
12/12/22	AMB	Work on reviewing hearing transcripts to reference exhibit numbers into WOWSC's Response to Staff's Sixth Request for Information; finalize; e-file; serve; and save WOWSC's Response to Staff's Sixth RFI for Docket No. 50788. (Administration/Case Management)	4.50
12/13/22	JLM	Review Objections to K. Allen testimony; review and finalize response to Staff 7th RFIs; calls with R. Arnett. (Administration; Discovery)	.50
12/13/22	RAA	Research effect of SOAH order finding testimony untimely; draft Response to Staff's Seventh RFI, Objections to Kathryn Allen's Supplemental Direct Testimony, and Objections to Robert Gaines' Supplemental Direct Testimony (Administrative).	6.60
12/13/22	AMB	Correspond with R. Arnett and J. Mauldin regarding response; finalize WOWSC's Response to Staff's Seventh Request for Information for Docket No. 50788. (Administration/Case Management)	1.20
12/13/22	PAE	Review SOAH Order No. 26 in Docket No. 50788; review and revise Errata to M. Nelson Rebuttal Testimony; prepare attachments to same; citation research;	1.60
12/14/22	JLM	Revise objections to ratepayers supplemental direct testimony; review Staff's 8th RFIs to WOWSC; call with G. Rabon. (Administration)	1.50
12/14/22	JEF	Assist with excerpts from pretrial hearing for rebuttal testimony. (Administration)	.20
12/14/22	RAA	Draft Objections to Kathryn Allen's Supplemental Direct Testimony (Administrative).	2.20
12/14/22	AMB	E-file; serve; and save WOWSC's Response to Staff's Seventh Request for Information for Docket No. 50788. (Administration/Case Management)	.50
12/14/22	PAE	Extensive review and revision of Errata of M. Nelson in Docket No. 50788; file management; (Administration).	1.50
12/15/22	JLM	Finalize Objections to Ratepayer's Supplemental Direct; work on Errata to Mike Nelson's Rebuttal Testimony. (Administration; Testimony)	1.50
12/15/22	RAA	Draft Objections to Kathryn Allen's and Robert Gaines' Supplemental Direct Testimony; review Commission Staff's Eighth RFI. (Administrative).	1.30
12/15/22	AMB	Work on reviewing; editing; finalize; e-file; serve; and save WOWSC's Objections to Ratepayers Supplemental Direct Testimony of Robert Gaines and Kathryn E. Allen; update Errata to the Rebuttal Testimony of Mike Nelson for Docket No. 50788. (Administration/Case Management)	3.80
12/16/22	JLM	Call with M. Lander regarding calculation of RFI deadline. (Correspondence; Discovery)	.40
12/16/22	RAA	Legal research regarding PUC rules related to holiday filing schedule (Administrative).	.70
12/19/22	AMB	E-file; serve; and save WOWSC's First Errata to the Rebuttal Testimony of Mike Nelson for Docket No. 50788. (Administration/Case Management)	.40
12/20/22	JLM	Review Ratepayers 5th RFIs to WOWSC; correspondence related to RFIs. (Administration)	.40

Lloyd Gosselink Rochelle & Townsend, P.C.

Windermere Oaks Water Supply Corporation
PUC Rate Appeal
I.D.3870-4-JLM

January 12, 2023
Invoice: 97538168

Date	Atty	Description Of Services Rendered	Hours
12/20/22	RAA	Review Ratepayers' Fifth RFI (Administrative).	.10
12/20/22	AMB	Save Ratepayers Fifth Request for Information to WOWSC; calendar response deadline; draft a shell for WOWSC's Response to Ratepayers Fifth RFI for Docket No. 50788. (Administration/Case Management)	1.20
12/21/22	AMB	Work on drafting shell for WOWSC's Response to Ratepayers Fifth Request for Information for Docket No. 50788. (Administration/Case Management)	1.50
12/30/22	RAA	Review Ratepayers' Response to WOWSC Objections, draft email regarding same. (Administrative).	.80

TOTAL PROFESSIONAL SERVICES**\$ 19,999.00****SUMMARY OF PROFESSIONAL SERVICES**

Name	Staff Level	Hours	Rate	Total
Jose E de la Fuente	Principal	.70	330.00	231.00
Jamie L Mauldin	Principal	9.60	310.00	2,976.00
Rick X Arnett	Associate	48.40	280.00	13,552.00
Patricia A Estrada	Paralegal	5.60	150.00	840.00
Amanda M Benavides	Paralegal	16.00	150.00	2,400.00
TOTALS		80.30		\$ 19,999.00

DISBURSEMENTS

Date	Description	Amount
12/31/22	NewGen Strategies an Voucher # - 000115954 NewGen Strategies and Solutions, LLC, Consultant Services, Professional services through December 2022 regarding Windermere Oaks WSC Rate Appeal, 12/31/2022	260.00

TOTAL DISBURSEMENTS**\$ 260.00****TOTAL THIS INVOICE****\$ 20,259.00**



275 W.Campbell Road, Suite 440
 Richardson, TX 75080
 Tel: 972-680-2000 Fax: 972-680-2007

Invoice

Invoice Date: Dec 31, 2022
Invoice Num: 14998
Billing Through: Dec 31, 2022

Lloyd Gosselink Rochelle & Townsend, P.C.
 816 Congress Avenue
 Suite 1900
 Austin, TX 78701

LG- Windermere Oaks WSC Rate Appeal (LG- Windermere Oaks WSC Rate Appeal TX-RLS2111:) - Managed by (Rabon, Grant)

Contract Amount: \$20,000.00	Amount Billed: \$16,772.50	Amount Remaining: \$3,227.50
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Professional Services

<u>Employee</u>	<u>Description</u>	<u>Hours</u>	<u>Rate</u>	<u>Amount</u>
Grant S. Rabon	Professional Fees	1.00	\$260.00	\$260.00
Total Service Amount:				\$260.00
Amount Due This Invoice:				\$260.00

This invoice is due on 1/30/2023

Account Summary

Services BTD	Expenses BTD	Last Inv Num	Last Inv Date	Last Inv Amt	Last Pay Amt	Prev Unpaid Amt
\$16,772.50	\$0.00	14818	11/30/2022	\$260.00	\$0.00	\$16,512.50

Time Detail and Notes Follow on Next Page

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 Tel: 972-680-2000 Fax: 972-680-2007

Invoice

Invoice Date: Dec 31, 2022
Invoice Num: 14998
Billing Through: Dec 31, 2022

Lloyd Gosselink Rochelle & Townsend, P.C.
 816 Congress Avenue
 Suite 1900
 Austin, TX 78701

Date	Name	Duration	Notes
Project (Name) - LG- Windermere Oaks WSC Rate Appeal TX-RLS2111: (LG- Windermere Oaks WSC Rate Appeal)			
Rabon, Grant			
12/2/2022	Grant S. Rabon	1.00	call with client to review RFIs
	Total Rabon, Grant:	1.00	
	Total LG- Windermere Oaks WSC Rate Appeal TX-RLS2111: - LG- Windermere Oaks WSC Rate Appeal :	1.00	



816 Congress Avenue, Suite 1900
Austin, Texas 78701
Telephone: (512) 322-5800
Facsimile: (512) 472-0532

www.lglawfirm.com

February 6, 2023

Windermere Oaks Water Supply Corporation
Attn Joe Gimenez
Board President
424 Coventry Road
Spicewood, TX 78669

Invoice: 97538496
Client: 3870
Matter: 4
Billing Attorney: JLM
Tax ID # 74-2308445

INVOICE SUMMARY

For professional services and disbursements rendered through January 31, 2023:

RE: PUC Rate Appeal

Professional Services	\$ 23,484.00
Total Disbursements	<u>\$ 1,960.00</u>
TOTAL THIS INVOICE	\$ 25,444.00

Lloyd Gosselink Rochelle & Townsend, P.C.

Windermere Oaks Water Supply Corporation
PUC Rate Appeal
I.D.3870-4-JLM

February 6, 2023
Invoice: 97538496

PROFESSIONAL SERVICES RENDERED

Date	Atty	Description Of Services Rendered	Hours
1/03/23	JLM	Confer with R. Arnett on reply to Response and Motion to Strike Second Supplemental Testimony of Kathryn Allen.(Administration)	.40
1/03/23	RAA	Determine deadlines for various filings; discuss Reply to Ratepayers' Response to WOWSC Objections to Ratepayer Supplemental Direct Testimony with JLM, draft Reply. (Administrative),	4.10
1/03/23	PAE	Review rules, calculate response and objections deadlines to Ratepayers objections to WOWSC testimonies in Docket No. 50788; email to team regarding same; calendar deadlines; file management; (Administration).	.30
1/04/23	JLM	Review and finalize draft of reply to Response and Motion to Strike Second Supplemental Testimony of Kathryn Allen. (Administration)	.50
1/04/23	RAA	Draft Reply to Ratepayers' Response to WOWSC Objections to Ratepayers' Supplemental Direct Testimony, Response to Staff's Eighth RFI. (Administration).	2.00
1/04/23	AMB	Review and edit WOWSC's Response to Ratepayers' Response to WOWSC's Objection and Motion to Strike Supplemental Direct Testimony for Docket No. 50788. (Administration/Case Management)	1.40
1/05/23	RAA	Draft Response to Staff's Eighth RFI. (Administration).	1.80
1/06/23	JLM	Review draft RFI responses; review Ratepayers RFI responses; confer with co-counsel; review SOAH Order. (Discovery, Administration)	1.30
1/06/23	RAA	Draft Response to Staff's Eighth RFI. (Administration).	2.50
1/06/23	AMB	Work on preparing attachments for WOWSC's Response to Staff's 8th Request for Information for Docket No. 50788. (Administration/Case Management)	.50
1/08/23	RAA	Draft Response to Staff's Eighth RFI. (Administration).	.40
1/09/23	JLM	Work on and finalize responses to Staff's RFIs. (Discovery)	1.30
1/09/23	RAA	Draft Response to Staff's Eighth RFI, Ratepayers' Fifth RFI. (Administration).	2.60
1/09/23	AMB	Work on preparing attachments, finalize, e-file, serve, and save WOWSC's Response to Staff's 8th Request for Information for Docket No. 50788. (Administration/Case Management)	2.10
1/10/23	JLM	Review and analyze Staff testimony; correspondence; confer with co-counsel on outstanding discovery. (Administration)	1.50
1/10/23	RAA	Draft Response to Staff's Fifth RFI; review Staff Supplemental Direct Testimony. (Administration).	.50
1/11/23	JLM	Work on Responses to Ratepayers 5th RFIs; calls and correspondence. (Discovery)	.70
1/11/23	RAA	Confer with client regarding Response to Ratepayers' Fifth RFI, draft response to same. (Administration).	3.10
1/11/23	AMB	Work on preparing attachments for WOWSC's Response to Ratepayers' 5th Request for Information for Docket No. 50788. (Administration/Case Management)	.50
1/12/23	JLM	Prepare for strategy call regarding rebuttal testimony; finalize response to Ratepayers 5th RFIs (Testimony; Discovery)	.80
1/12/23	RAA	Draft Response to Staff's Fifth RFI. (Administration).	.30

Lloyd Gosselink Rochelle & Townsend, P.C.

Windermere Oaks Water Supply Corporation
PUC Rate Appeal
I.D.3870-4-JLM

February 6, 2023
Invoice: 97538496

Date	Atty	Description Of Services Rendered	Hours
1/12/23	AMB	Work on preparing attachments, finalize, e-file, serve, and save WOWSC's Response to Ratepayers 5th Request for Information for Docket No. 50788. (Administration/Case Management)	2.70
1/12/23	PAE	Draft shells for WOWSC's Fourth Request for Information to Ratepayers and WOWSC's First Request for Information to Staff in Docket No. 50788; file management; (Administration).	1.00
1/13/23	JLM	Strategy meeting with client to discuss Rebuttal Testimony; confer with co counsel. (Testimony)	2.00
1/13/23	RAA	Participate in client call; draft WOWSC's Fourth RFI to Ratepayers, WOWSC's First RFI to Staff. (Administration).	1.80
1/13/23	AMB	Respond to email from Kathryn Allen regarding WOWSC's Response to Ratepayers' 5th RFI for Docket No. 50788. (Administration/Case Management)	.40
1/13/23	PAE	Draft shell supplemental rebuttal testimonies of J. Gimenez and M. Nelson in Docket No. 50788; draft shell response to Ratepayers Sixth RFI to WOWSC; calculate and calendar objection and response deadlines; review citations to transcript for R. Arnett; file management; (Administration).	2.70
1/17/23	JLM	Review and edit RFIs to Staff and Ratepayers; review Ratepayers 6th RFIs; confer with co-counsel. (Discovery)	1.60
1/17/23	RAA	Draft WOWSC's First RFI to Staff, WOWSC's Fourth RFI to Ratepayers, confer with client regarding same; review Ratepayers' Sixth RFI. (Administration).	3.60
1/17/23	PAE	Review and revise shell supplemental rebuttal testimonies of J. Gimenez and M. Nelson in Docket No. 50788; file management; (Administration).	.30
1/18/23	JLM	Work on finalizing RFIs; work on Rebuttal Testimony outline; confer with co-counsel; analyze Ratepayers response to Staff's Motion of Anna Givens to Adopt Testimony of M. Gilford. (Discovery; Testimony; Administration)	2.90
1/18/23	RAA	Draft RFIs to Staff and Ratepayers, Supplemental Rebuttal Testimony of Joe Gimenez III and Mike Nelson. (Administration).	6.80
1/18/23	AMB	Review, edit, and finalize WOWSC's 4th Request for Information to Ratepayers; review and edit WOWSC's 1st Request for Information to Commission Staff for Docket No. 50788. (Administration/Case Management)	1.20
1/18/23	PAE	File and serve WOWSC's Fourth Request For Information to Ratepayers and WOWSC's First Request For Information to Staff in Docket No. 50788; calendar deadlines; file management. (Administration/Case Management)	.80
1/19/23	JLM	Review and edit draft Rebuttal Testimonies; confer with co-counsel.(Testimony)	.90
1/19/23	RAA	Draft Mike Nelson's and Joe Gimenez's Supplemental Rebuttal Testimony. (Administration).	1.50
1/19/23	PAE	Review and revise testimonies; file management. (Administration/Case Management)	.40
1/20/23	RAA	Review JLM's fifth supplemental rebuttal testimony, Ratepayers' Amended Sixth RFI (Administration).	.60
1/20/23	PAE	Draft WOWSC's Fifth Supplemental Direct Testimony of J. Mauldin in Docket No. 50788; compile invoices and update rate case expense tracking chart; prepare	3.70

Lloyd Gosselink Rochelle & Townsend, P.C.

Windermere Oaks Water Supply Corporation
PUC Rate Appeal
I.D.3870-4-JLM

February 6, 2023
Invoice: 97538496

Date	Atty	Description Of Services Rendered	Hours
		attachments; file management. communications regarding court reporter for upcoming hearing; review and compare Ratepayers amended discovery filing. (Administration/Case Management)	
1/23/23	JLM	Meeting with WOWSC general counsel to discuss approval of surcharge in tariff; confer with co-counsel; review filings. (Administrative)	.90
1/23/23	RAA	Review Mike Nelson Rebuttal Testimony attachment, Ratepayers' Objection to the Supplemental Testimony of Anna Givens; draft Response to Ratepayers' Sixth RFI. (Administration).	1.10
1/23/23	PAE	Review Ratepayers newly filed discovery requests in Docket No. 50788; compare all; calculate and calendar new deadlines; file management. (Administration/Case Management)	1.00
1/25/23	JLM	Review Ratepayer Objections to RFIs; confer with opposing counsel; confer with co-counsel. (Discovery)	.90
1/25/23	RAA	Review Ratepayers' Amended Sixth RFI, prepare shell response; Correspond with WOWSC's Supplemental Rebuttal Testimony; review Ratepayers' Objections to WOWSC's Fourth RFI, draft motion to compel. (Administration).	2.50
1/25/23	PAE	Review rules regarding motions to compel and objection deadlines; review Ratepayer's objections; calendar deadlines; file management. (Administration/Case Management)	.90
1/26/23	JLM	Finalize motion to compel. (Discovery)	.30
1/26/23	PAE	Review and revise WOWSC's Motion to Compel in Docket No. 50788; finalize, file and serve same; file management. (Administration/Case Management)	1.30
1/27/23	JLM	Meeting with client and Grant Rabon to discuss Rebuttal Testimony and RFI Responses; confer with co-counsel. (Discovery; Testimony)	1.40
1/27/23	RAA	Prepare for client call regarding supplemental rebuttal testimony; attend client call. (Administration).	2.30
1/29/23	JLM	Work on rebuttal testimony. (Testimony)	.30
1/30/23	RAA	Draft Response to Ratepayers' Sixth RFI, supplemental rebuttal testimony; review Ratepayers' Seventh RFI. (Administration).	4.20
1/31/23	JLM	Confer with co-counsel on RFI responses to Ratepayers 6th and 7th; confer regarding draft rebuttal testimony; review Ratepayers filings. (Discovery; Testimony)	1.00
1/31/23	RAA	Evaluate responsive documents to Ratepayers' Sixth RFI, draft Response to same; analyze Ratepayers' Seventh RFI, draft Response to same; draft Supplemental Rebuttal Testimony of Mike Nelson. (Administration).	7.70
1/31/23	AMB	Review and edit WOWSC's Response to Ratepayers' 6th Request for Information; prepare attachments for WOWSC's Responses to Ratepayers' 6th Request for Information. (Administration/Case Management)	2.30
1/31/23	PAE	Draft shell response to Ratepayers Seventh Request for Information to WOWSC; calculate and calendar deadlines; review Ratepayers' response to WOWSC's Motion to Compel; file management. (Administration/Case Management)	2.20

Lloyd Gosselink Rochelle & Townsend, P.C.

Windermere Oaks Water Supply Corporation
PUC Rate Appeal
I.D.3870-4-JLM

February 6, 2023
Invoice: 97538496

TOTAL PROFESSIONAL SERVICES**\$ 23,484.00****SUMMARY OF PROFESSIONAL SERVICES**

Name	Staff Level	Hours	Rate	Total
Jamie L Mauldin	Principal	18.70	310.00	5,797.00
Rick X Arnett	Associate	49.40	280.00	13,832.00
Patricia A Estrada	Paralegal	14.60	150.00	2,190.00
Amanda M Benavides	Paralegal	11.10	150.00	1,665.00
TOTALS		93.80		\$ 23,484.00

DISBURSEMENTS

Date	Description	Amount
1/31/23	NewGen Strategies an Voucher # - 000116260 NewGen Strategies and Solutions, LLC, Consultant Services, Professional services through January 2023 regarding Windermere Oaks WSC Rate Appeal, 01/31/2023	1,960.00

TOTAL DISBURSEMENTS**\$ 1,960.00****TOTAL THIS INVOICE****\$ 25,444.00**



275 W.Campbell Road, Suite 440
 Richardson, TX 75080
 Tel: 972-680-2000 Fax: 972-680-2007

Lloyd Gosselink Rochelle & Townsend, P.C.
 816 Congress Avenue
 Suite 1900
 Austin, TX 78701

Invoice

Invoice Date: Jan 31, 2023
Invoice Num: 15206
Billing Through: Jan 31, 2023

LG- Windermere Oaks WSC Rate Appeal (LG- Windermere Oaks WSC Rate Appeal TX-RLS2111) - Managed by (Rabon

Contract Amount: \$20,000.00	Amount Billed: \$18,732.50	Amount Remaining: \$1,267.50
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Professional Services

<u>Employee</u>	<u>Description</u>	<u>Hours</u>	<u>Rate</u>	<u>Amount</u>
Cari Anderson	Professional Fees	2.00	\$155.00	\$310.00
Grant S. Rabon	Professional Fees	6.00	\$275.00	\$1,650.00
Total Service Amount:				\$1,960.00
Amount Due This Invoice:				\$1,960.00

This invoice is due on 3/2/2023

Account Summary

Services BTD	Expenses BTD	Last Inv Num	Last Inv Date	Last Inv Amt	Last Pay Amt	Prev Unpaid Amt
\$18,732.50	\$0.00	14998	12/31/2022	\$260.00	\$0.00	\$16,772.50

Time Detail and Notes Follow on Next Page

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 Tel: 972-680-2000 Fax: 972-680-2007

Invoice

Lloyd Gosselink Rochelle & Townsend, P.C.
 816 Congress Avenue
 Suite 1900
 Austin, TX 78701

Invoice Date: Jan 31, 2023
Invoice Num: 15206
Billing Through: Jan 31, 2023

Date	Name	Duration	Notes
Project (Name) - LG- Windermere Oaks WSC Rate Appeal TX-RLS2111: (LG- Windermere Oaks WSC Rate Appeal)			
Anderson, Cari			
1/4/2023	Cari Anderson	2.00	Input income data from P&L pdfs (2015-2019)
	Total Anderson, Cari:	<u>2.00</u>	
Rabon, Grant			
1/6/2023	Grant S. Rabon	1.00	respond to Staff RFIs
1/13/2023	Grant S. Rabon	1.50	call with client and legal counsel
1/27/2023	Grant S. Rabon	2.00	call with client
1/30/2023	Grant S. Rabon	0.50	review and comment on Mike's testimony
1/31/2023	Grant S. Rabon	1.00	review/comment on Joe's testimony
	Total Rabon, Grant:	<u>6.00</u>	
	Total LG- Windermere Oaks WSC Rate Appeal TX-RLS2111: - LG- Windermere Oaks WSC Rate Appeal :	<u><u>8.00</u></u>	



275 W.Campbell Road, Suite 440
 Richardson, TX 75080
 Tel: 972-680-2000 Fax: 972-680-2007

Invoice

Invoice Date: Oct 31, 2022
Invoice Num: 14633
Billing Through: Oct 31, 2022

Lloyd Gosselink Rochelle & Townsend, P.C.
 816 Congress Avenue
 Suite 1900
 Austin, TX 78701

LG- Windermere Oaks WSC Rate Appeal (LG- Windermere Oaks WSC Rate Appeal TX-RLS2111:) - Managed by (Rabon, Grant)

Contract Amount: \$20,000.00	Amount Billed: \$16,252.50	Amount Remaining: \$3,747.50
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Professional Services

<u>Employee</u>	<u>Description</u>	<u>Hours</u>	<u>Rate</u>	<u>Amount</u>
Christopher D. Ekrut	Professional Fees	0.50	\$310.00	\$155.00
Grant S. Rabon	Professional Fees	14.50	\$260.00	\$3,770.00
Total Service Amount:				\$3,925.00
Amount Due This Invoice:				\$3,925.00

This invoice is due on 11/30/2022

Account Summary

Services BTD	Expenses BTD	Last Inv Num	Last Inv Date	Last Inv Amt	Last Pay Amt	Prev Unpaid Amt
\$16,252.50	\$0.00	12527	1/31/2022	\$500.00	\$0.00	\$12,327.50

Time Detail and Notes Follow on Next Page

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Invoice

Invoice Date: Oct 31, 2022

Invoice Num: 14633

Billing Through: Oct 31, 2022

Lloyd Gosselink Rochelle & Townsend, P.C.
 816 Congress Avenue
 Suite 1900
 Austin, TX 78701

Date	Name	Duration	Notes
Project (Name) - LG- Windermere Oaks WSC Rate Appeal TX-RLS2111: (LG- Windermere Oaks WSC Rate Appeal)			
Ekrut, Christopher			
10/14/2022	Christopher D. Ekrut	0.25	QA/QC of Rabon Testimony
10/27/2022	Christopher D. Ekrut	0.25	Testimony Discussions with Grant / Review of Testimony
Total Ekrut, Christopher:			0.50
Rabon, Grant			
10/14/2022	Grant S. Rabon	8.00	review issues, data, and develop testimony
10/25/2022	Grant S. Rabon	2.00	revise testimony
10/27/2022	Grant S. Rabon	4.50	revise draft testimony incorporating results from analysis
Total Rabon, Grant:			14.50
Total LG- Windermere Oaks WSC Rate Appeal TX-RLS2111: - LG- Windermere Oaks WSC Rate Appeal :			15.00

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Lloyd Gosselink Rochelle & Townsend, P.C.
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 Austin, TX 78701

Invoice

Invoice Date: Nov 30, 2022
Invoice Num: 14818
Billing Through: Nov 30, 2022

LG- Windermere Oaks WSC Rate Appeal (LG- Windermere Oaks WSC Rate Appeal TX-RLS2111:) - Managed by (Rabon, Grant)

Contract Amount: \$20,000.00	Amount Billed: \$16,512.50	Amount Remaining: \$3,487.50
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Professional Services

<u>Employee</u>	<u>Description</u>	<u>Hours</u>	<u>Rate</u>	<u>Amount</u>
Grant S. Rabon	Professional Fees	1.00	\$260.00	\$260.00
Total Service Amount:				\$260.00
Amount Due This Invoice:				\$260.00

This invoice is due on 12/30/2022

Account Summary

Services BTD	Expenses BTD	Last Inv Num	Last Inv Date	Last Inv Amt	Last Pay Amt	Prev Unpaid Amt
\$16,512.50	\$0.00	14633	10/31/2022	\$3,925.00	\$0.00	\$16,252.50

Time Detail and Notes Follow on Next Page

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 Austin, TX 78701

Invoice

Invoice Date: Nov 30, 2022
Invoice Num: 14818
Billing Through: Nov 30, 2022

Date	Name	Duration	Notes
Project (Name) - LG- Windermere Oaks WSC Rate Appeal TX-RLS2111: (LG- Windermere Oaks WSC Rate Appeal)			
Rabon, Grant			
11/7/2022	Grant S. Rabon	1.00	call to review RFI with client and legal counsel
	Total Rabon, Grant:	1.00	
	Total LG- Windermere Oaks WSC Rate Appeal TX-RLS2111: - LG- Windermere Oaks WSC Rate Appeal :	1.00	



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Invoice

Invoice Date: Dec 31, 2022
Invoice Num: 14998
Billing Through: Dec 31, 2022

Lloyd Gosselink Rochelle & Townsend, P.C.
 816 Congress Avenue
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 Austin, TX 78701

LG- Windermere Oaks WSC Rate Appeal (LG- Windermere Oaks WSC Rate Appeal TX-RLS2111:) - Managed by (Rabon, Grant)

Contract Amount: \$20,000.00	Amount Billed: \$16,772.50	Amount Remaining: \$3,227.50
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Professional Services

<u>Employee</u>	<u>Description</u>	<u>Hours</u>	<u>Rate</u>	<u>Amount</u>
Grant S. Rabon	Professional Fees	1.00	\$260.00	\$260.00
Total Service Amount:				\$260.00
Amount Due This Invoice:				\$260.00

This invoice is due on 1/30/2023

Account Summary

Services BTD	Expenses BTD	Last Inv Num	Last Inv Date	Last Inv Amt	Last Pay Amt	Prev Unpaid Amt
\$16,772.50	\$0.00	14818	11/30/2022	\$260.00	\$0.00	\$16,512.50

Time Detail and Notes Follow on Next Page

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Invoice

Invoice Date: Dec 31, 2022
Invoice Num: 14998
Billing Through: Dec 31, 2022

Date	Name	Duration	Notes
Project (Name) - LG- Windermere Oaks WSC Rate Appeal TX-RLS2111: (LG- Windermere Oaks WSC Rate Appeal)			
Rabon, Grant			
12/2/2022	Grant S. Rabon	1.00	call with client to review RFIs
	Total Rabon, Grant:	1.00	
	Total LG- Windermere Oaks WSC Rate Appeal TX-RLS2111: - LG- Windermere Oaks WSC Rate Appeal :	1.00	



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Invoice

Invoice Date: Jan 31, 2023
Invoice Num: 15206
Billing Through: Jan 31, 2023

LG- Windermere Oaks WSC Rate Appeal (LG- Windermere Oaks WSC Rate Appeal TX-RLS2111): - Managed by (Rabon

(Grant)

Contract Amount: \$20,000.00	Amount Billed: \$18,732.50	Amount Remaining: \$1,267.50
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Professional Services

<u>Employee</u>	<u>Description</u>	<u>Hours</u>	<u>Rate</u>	<u>Amount</u>
Cari Anderson	Professional Fees	2.00	\$155.00	\$310.00
Grant S. Rabon	Professional Fees	6.00	\$275.00	\$1,650.00
Total Service Amount:				\$1,960.00
Amount Due This Invoice:				\$1,960.00

This invoice is due on 3/2/2023

Account Summary

Services BTD	Expenses BTD	Last Inv Num	Last Inv Date	Last Inv Amt	Last Pay Amt	Prev Unpaid Amt
\$18,732.50	\$0.00	14998	12/31/2022	\$260.00	\$0.00	\$16,772.50

Time Detail and Notes Follow on Next Page

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Invoice

Lloyd Gosselink Rochelle & Townsend, P.C.
 816 Congress Avenue
 Suite 1900
 Austin, TX 78701

Invoice Date: Jan 31, 2023
Invoice Num: 15206
Billing Through: Jan 31, 2023

Date	Name	Duration	Notes
Project (Name) - LG- Windermere Oaks WSC Rate Appeal TX-RLS2111: (LG- Windermere Oaks WSC Rate Appeal)			
Anderson, Cari			
1/4/2023	Cari Anderson	2.00	Input income data from P&L pdfs (2015-2019)
	Total Anderson, Cari:	<u>2.00</u>	
Rabon, Grant			
1/6/2023	Grant S. Rabon	1.00	respond to Staff RFIs
1/13/2023	Grant S. Rabon	1.50	call with client and legal counsel
1/27/2023	Grant S. Rabon	2.00	call with client
1/30/2023	Grant S. Rabon	0.50	review and comment on Mike's testimony
1/31/2023	Grant S. Rabon	1.00	review/comment on Joe's testimony
	Total Rabon, Grant:	<u>6.00</u>	
	Total LG- Windermere Oaks WSC Rate Appeal TX-RLS2111: - LG- Windermere Oaks WSC Rate Appeal :	<u>8.00</u>	