



April 27, 2022

Dear Boardmember:

In connection with an audit of our financial statements, please furnish answers to the following questions, sign your name, and return the questionnaire via email to [travis.berends@bergankdv.com](mailto:travis.berends@bergankdv.com). The questionnaire is designed to obtain information about transactions between ISD #4001 – Bluffview Montessori Charter School and any related parties.

Related parties include board of education members and certain administrative officials (e.g. school superintendent, business manager or equivalent position; etc.) as well as immediate family members of board members and administrative officials.

Please answer all questions. If the answer to any question is “yes,” please explain in the space provided.

Sincerely,

Henry Schantzen  
ISD #4001 – Bluffview Montessori

1. Have you, or any related party of yours, had any material interest, direct or indirect, in any of the following transactions or pending transactions since July 1, 2021 to which ISD #4001 – Bluffview Montessori was, or is to be, a party?

	YES	NO
• Sale, purchase, exchange, or leasing of property?	_____	_____
• Receiving or furnishing of goods, services, or facilities?	_____	_____
• Transfer or receipt of income or assets (other than payroll related items for teacher board members and members of management)?	_____	_____
• Maintenance of bank balances as compensating balances for the benefit of another?	_____	_____
• Other transactions?	_____	_____

---

---

---

2. Have you or any related party of yours been indebted to or had a receivable from ISD #4001 – Bluffview Montessori at any time since July 1, 2021? Please exclude amounts due for ordinary travel and expense advances.

Yes \_\_\_\_\_ No \_\_\_\_\_

---

---

---

3. Have you or any related party of yours had any material interest, direct or indirect, in any transactions since July 1, 2021, or in any pending or incomplete transactions to which any pension, retirement savings, or similar plan provided by ISD #4001 – Bluffview Montessori was, or is to be, a party? Do not include payments to a plan or payments by the plan made pursuant to the terms of the plan.

Yes \_\_\_\_\_ No \_\_\_\_\_

---

---

---

4. I am employed by \_\_\_\_\_.

My job function with my employer is \_\_\_\_\_.

My spouse's name is \_\_\_\_\_.

My spouse is employed by \_\_\_\_\_.

My spouse's job function with his/her employer is \_\_\_\_\_.

To: CliftonLarsonAllen LLP

The answers to the foregoing questions are correctly stated to the best of my knowledge and belief.

Date: \_\_\_\_\_

Signature: \_\_\_\_\_

Print Name: \_\_\_\_\_

(to verify spelling for financial statements)

Title: \_\_\_\_\_

(e.g., board chair, board member, superintendent, etc.)