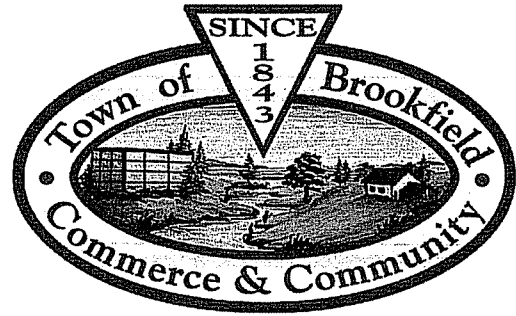


**Town of Brookfield**  
**645 N. Janacek Road**  
**Brookfield, WI 53045**

**Telephone: 262-796-3788**  
**FAX: 262-796-0339**



Mayor Soglin  
City of Madison

Dear Mayor Soglin and Madison Plan Commission and Alders,

I was asked to write to you about a development in the Town of Brookfield because I understand that you are considering an application by the same developer. Brookfield Highlands is a senior rental community that opened in 1989. United Financial Group was the applicant in 1988, and they continue to own and maintain the facility, which is now comprised of over 500 units on a property of approximately 38 acres. Records show that United Financial worked well with Town staff and that the development was well received.

This is now a mature proven property with a consistently strong operating history. In short, we have had no problems. Brookfield Highlands is located north of Davidson Road, across the street from Elmbrook Church at Davidson and Barker Roads. Elmbrook Church is possibly the largest church in metro Milwaukee. The church was there before Brookfield Highlands was developed, and the two are apparently good neighbors. The other three sides of the Brookfield Highlands site consist of single family neighborhoods.

I would bet that most tenants at Brookfield Highlands came from the surrounding area. As they continue to live independently, these seniors aged 55 or better can still shop, worship, receive services, and connect with friends and family as they always have. I am told that there are some residents who have lived there since 1989 – 24 years!

Of course, a fully taxable property is always welcomed by a community that is trying to balance public needs with tax revenue. I view Brookfield Highlands as a good fit for the Town of Brookfield as tax base; but mostly as an opportunity to provide housing for an important segment of our community who has invested decades in the area, working and raising their families. It is good that they can continue to live here.

I hope these comments provide some background about a developer that is possibly new to you, but well established in the Town of Brookfield.

Sincerely,

Rick Czopp, Town of Brookfield Administrator

May 3, 2013

Mayor Paul Soglin  
City of Madison Plan Commission and City of Madison Alderpersons

Dear City of Madison Officials,

A colleague called about a client that she and I are both well familiar with, and told me about United Financial Group's proposed development in Madison.

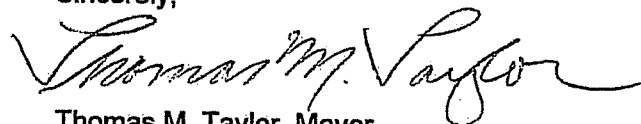
UFG owns about 80 acres in the City of Franklin and they are approved for 620 units at their Foresthill Highlands development. The first building opened in 2002. Seventy-five percent (75%) of the Foresthill Highlands master development plan is senior housing, of which 50% is built and operational. UFG has consistently delivered well-constructed, high-quality buildings for its Foresthill Highlands residents. And they have an excellent reputation in the Franklin community. They provide a good source of tax base with no impact to the school district and limited use of City services.

The City Planning and Engineering staffs continue to have a very positive experience in working with UFG's construction team. UFG's property management group has a 10-year record with the Foresthill development continuously serving as a positive contributor to the Franklin community. Essentially, the UFG team does what they say they will do, with great attention to detail.

Within the past year, 25% of the 80-acre site was approved for non-senior apartment development with no neighbor opposition because of the strong reputation of UFG, even though the adjacent neighborhoods on two sides of the development are comprised of single-family homes.

I have known Jon McMurtrie since that first development in 2002 and can say without hesitation that he is a quality developer who expects a great deal of himself and of his team. Whether senior apartments or market rate apartments, his occupancy rate of more than 98% speaks to the satisfaction of his tenants. This satisfaction is shared by me and City of Franklin staff who appreciate the company's solid, conservative approach to development.

Sincerely,



Thomas M. Taylor, Mayor  
City of Franklin

/lh



MADISON REGION ECONOMIC DEVELOPMENT PARTNERSHIP

May 6, 2013

Dear Mayor Soglin and members of the Madison Common Council and Plan Commission,

I was Mayor of the City of Green Bay when Parkway Highlands opened there in 2002. This is a development of leased homes for independent senior citizens developed by United Financial Group. United Financial is based in Appleton and owned by Jon McMurtrie. I remember Jon because I worked closely with him to get Parkway Highlands approved when communication with a landowner broke down just as construction was about to start. Because of the quality of the Parkway Highlands proposal, I assisted with the negotiations to allow the project to move forward. My confidence in Jon McMurtrie and in United Financial as an organization was not misplaced as the development is an important asset to Green Bay for people aged 55 and older who are interested in an upscale and active senior living community close to where they raised their own families.

In addition, UFG has been a member of the Green Bay community for over 25 years, also operating non-senior residential rental communities.

As President of Thrive, I am pleased to learn that United Financial is proposing to develop in the City of Madison. I can tell you that Jon McMurtrie leads a team of quality people who are devoted to: making sure every detail is considered as they put forward an application, constructing their buildings in a manner that is respectful of surrounding neighbors, and managing/maintaining their facilities to keep property values high – for them and for surrounding properties.

I regret that I am not available to be at the public hearing at Plan Commission this evening. But I hope my letter will be included in the public record as you proceed with your deliberations.

Sincerely,

Paul Jadin  
President, Thrive  
615 E. Washington Ave  
608.443.1955  
pjadin@thrivehere.org



**Village of Menomonee Falls**  
W156 N8480 Pilgrim Road  
Menomonee Falls WI 53051-3140  
Telephone: (262) 532-4200

May 2, 2013

Honorable Mayor and Common Council  
City of Madison

Via email: [mc@lanserpublicaffairs.com](mailto:mc@lanserpublicaffairs.com)

Re: United Financial Group, Inc.  
Senior Living Projects in Village of Menomonee Falls

Dear Mayor and Common Council:

I am writing this letter as the Village Manager for the Village of Menomonee Falls in Waukesha County. United Financial Group, Inc. and their president, Jon McMurtrie, have had a long and successful relationship with the Village of Menomonee Falls. In 2000, United Financial Group, Inc. received approvals and has since developed the Wildwood Highlands Project, which allows 400 senior dwelling units. This project has been extremely successful for the Village and our senior population. In 2005, United Financial Group, Inc. received approvals for the Wildwood Lakes development, allowing 182 senior dwelling units. This project is near full development at this time. Finally, in 2012, 167 senior dwelling units were approved in the Waterside Highlands development located in the southwest quadrant of the Village. No development has occurred yet on this project.

The Village President and Board of Trustees have been appreciative of the above-listed projects and have confidence in the market knowledge and development capability that John McMurtrie and his team bring to their projects. The Village of Menomonee Falls has no hesitation in recommending United Financial Group, Inc. to the City of Madison.

Sincerely,

VILLAGE OF MENOMONEE FALLS

Mark Fitzgerald  
Village Manager

MF:LLO

cc: Matt Carran



11333 N. Cedarburg Road 60W  
Mequon, Wisconsin 53092  
Phone (262) 236-2944  
Fax (262) 242-9819  
mayor@ci.mequon.wi.us

Mayor Curt Gielow

May 2, 2013

The Honorable Paul R. Soglin  
Mayor of the City of Madison  
210 Martin Luther King Jr. Blvd., Room 463  
City-County Building  
Madison, Wisconsin 53703

Dear Mayor Soglin, and  
Distinguished Members of the Common Council, and  
Members of the Plan Commission

I recently completed my term as Mayor of the City of Mequon, Wisconsin during which time Mr. Jon McMurtie, Chairman of the United Financial Group, proposed a 96 unit senior apartment complex in our community.

The development was approved by our Plan Commission and Common Council with limited alterations and the 96 unit project valued at \$7.6 million is now under construction. Phase One of the project is nearing completion this summer. Mr. McMurtie, his immediate staff, and the entire organization were accommodating, forthright and very professional in all of our dealing with them. They demonstrated their financial strength and expertise for this project to our satisfaction.

I recommend the United Financial Group and Mr. Jon McMurtie without hesitation for any project of similar purpose in the City of Madison.

Respectfully,

Curtis C. Gielow  
Mayor (2010-2013)



DEPARTMENT OF DEVELOPMENT  
John F. Stibal

414/302-8460  
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[jstibal@westalliswi.gov](mailto:jstibal@westalliswi.gov)

May 2, 2013

The Honorable Mayor Soglin and  
Members of the Common Council and Plan Commission  
Madison City Hall  
Madison, Wisconsin

Dear Mayor Soglin and Members of the Common Council and Plan Commission:

I am writing to be on record for your upcoming public hearings about the application of United Financial Group (UFG) for their Highlands Community in the City of Madison. While UFG is best known for independent senior apartments, their development in the City of West Allis, the Oklahoma Park Townhomes, consists of 44 market-rate townhomes in six, 2-story buildings with attached garages at 11301 W. Oklahoma Avenue between 112-114<sup>th</sup> Streets just east of West National Avenue.

UFG has been a member of the West Allis community since 1990, when they purchased the site from the Lardinois and Rian families. UFG constructed the site in 1999, and has been the professional property manager ever since. I understand that UFG builds and manages their own sites, 20% of which are market rate communities, including the Oklahoma Park West Allis property.

UFG did a great deal of community outreach as part of their application process, including multiple public information meetings. They continue to be an asset to the community, providing well-constructed, well-maintained townhome rentals to West Allis residents. A development like this one by a seasoned team of professionals is welcomed by any municipality. In the current economy, young professionals as well as empty nesters are inclined to rent as a lifestyle choice. I am happy to have Oklahoma Park as one of the many high-quality housing options in West Allis, for people who choose to live in this vibrant city.

Thank you,

John F. Stibal  
Director, Department of Development

JFS:bjb