



**Fox Rothschild** LLP  
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April 24, 2023

Via Electronic Submittal

Ms. A. Shonta Dunston  
Chief Clerk  
North Carolina Utilities Commission  
430 N. Salisbury Street, Room 5063  
Raleigh, NC 27603

**Re: In the Matter of**  
**Application by Aqua North Carolina, Inc. for Authority to Adjust and**  
**Increase Rates and Charges for Water and Sewer Utility Service in All**  
**Service Areas in North Carolina**  
**Docket No. W-218, Sub 573**  
***Update to Aqua Rate Case Expense***

Dear Ms. Dunston:

On behalf of Aqua North Carolina, Inc. ("Aqua"), I herewith provide for filing in the above referenced docket, update to Aqua Rate Case Expense. Supporting documentation for same will be provided to Public Staff for their review.

If you should have any questions concerning this filing, please let me know. Thank you and your staff for your assistance.

Sincerely,  
*David T. Drooz*  
David T. Drooz  
Attorney for  
Aqua North Carolina, Inc.

pbb

Enclosures

A Pennsylvania Limited Liability Partnership

California Colorado Delaware District of Columbia Florida Georgia Illinois Minnesota Nevada  
New Jersey New York North Carolina Pennsylvania South Carolina Texas Virginia Washington



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Copy to: Parties and Counsel of Record  
Elizabeth Culpepper, NC Public Staff  
Heather Fennell, Commission - Legal  
Jessica Heironimus, NC Public Staff  
Lynn Jarvis, Commission - Legal  
Megan Jost, NC Public Staff  
Monica Webb-Shackleford, Commission – Legal

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Apr 24 2023

AQUA NC RATE CASE EXPENSE W-218 SUB 573				
<u>COMPARE TO FILING AMOUNTS</u>				
	Filed	Billed as of 4/20/23	Estimated* to Completion	Projected
<b>NC Legal</b>				
Jo Anne Sanford	600,000	310,567		310,567
Fox Rothschild LLP - David Drooz		231,009		231,009
<b>Total Legal Exp. For Case</b>	<b>600,000</b>	<b>541,577</b>	<b>0</b>	<b>541,577</b>
<b>ROE Cap Structure</b>				
Scott Madden - Dylan D'Ascendis (ROE/Cap Structure)	45,000	51,898		51,898
Gannett Fleming-John Spanos (Depr Study Update)	20,000	22,913		22,913
				0
Kunkel Water Efficiency Consulting - Water Audit		1,400		1,400
<b>TOTAL - CONSULTANTS</b>	<b>65,000</b>	<b>76,211</b>	<b>0</b>	<b>76,211</b>
<b>Aqua NC Employees/Contractors</b>				
Billing Analysis/Rate Design-Dan Franceski	80,000	131,748		131,748
Aqua Service Co Employees	6,000			0
Regulated Capital Consultants (Multi-Year Rates/WSIP Model)	439,668	495,762		495,762
<b>Total Aqua Employees/Contractors Exp for Case</b>	<b>525,668</b>	<b>627,510</b>	<b>0</b>	<b>627,510</b>
<b>Other</b>				
Filing Fee (Part of the June 2022 Sanford Invoice)	500			0
NC Dept of Commerce - Hearing Costs / Transcripts	10,505	13,514		13,514
Postage/Printing-Notices (MPS Communications)	200,000	216,483	105,000	321,483
PWC Fee for PS info requests	2,500			0
Filing Costs-Binders & Printing (NOVA Office Strategies)	11,433	12,165		12,165
Travel Expense for Hearing	865			0
PS trip to Bryn Mawr				0
<b>Total Other Exp. For Case</b>	<b>225,803</b>	<b>242,163</b>	<b>105,000</b>	<b>347,163</b>
<b>Total Invoices</b>	<b>#####</b>	<b>1,487,460</b>	<b>105,000</b>	<b>1,592,460</b>

\*The printing and postage estimate on the final customer notices based on previous costs incurred in this case

<u>Balance from Prior Cases as of 6/1/2023 (which amortizee by the end of 2023)</u>	
W-218 Sub 526 Rate Case Expense	\$ 136,868.61
W-218 Sub 497 Rate Case Expense	\$ 58,254.86
W-218 Sub 497 Depreciation Study	\$ 6,355.27
Public Staff Proposes to include these in Rate Year 1 Rae Case Expense (Not RY2 or RY3)	<u>\$ 201,478.74</u>