

Notes and Addendums

- Signed Attestation
- Bank Statement
- Attached answers to Follow Up Questions from PA-PUC
- Copy of Commercial Liability Insurance Card, and Declaration Page from Progressive
- Revised Balance Sheet
- Plan to have Meters and Dome Lights
- Business Plan

DATE OF DEPOSIT

NOV 24 2025

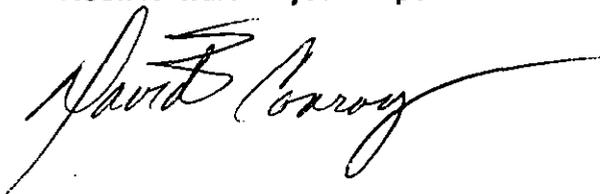
Statement Regarding Title and RegistrationPA Public Utility Commission
Secretary's Bureau

The 2019 Nissan Rogue Sport listed on the initial application is registered and titled in both Kimberly Exley's (Conroy) (Spouse) name and my name. Our current loan is through Tend To Credit Union. They are unable to provide refinancing on the vehicle to the business name as they are not able to write loans in the name of a business. We would need to seek refinancing through another financial institution. The business plan is once we have received the PA PUC number and are able to begin accepting transportation requests, we will be transferring the vehicle to the business name and most likely purchasing an additional vehicle. Due to the fees associated with transferring the vehicle into the business name and having to refinance the vehicle to do so, I do not feel comfortable doing so until Carriage Concierge has been approved with a PA PUC number and we can begin servicing clients and generating income. Please note the business banking account balance is equivalent to the payoff on the Nissan Rogue Sport should something happen to it and we need to cover the cost of the vehicle. It is not our intention at this time to pay the balance off on the car until a PA PUC number is issued.

We hope that these adjustments are what is necessary to obtain authorization from the PA PUC in order to proceed and start acquiring clients.

If you have any questions or need further clarification, please feel free to contact me at any time to discuss.

I look forward to your response.



Business information

Keep your business information up to date.

 Manage Delegates : [Manage](#)

Basic information

Business name

~~Carnage Concierge~~

Customer name

David Conroy

Email addresses

Primary

C*****e@yahoo.com

[Edit](#)

Phone numbers

Business

*****7993

[+ Add Phone Number](#)

Addresses

Physical

1*****
Waterford, PA *****

[Edit](#)

[Back to Account Summary](#)

Account Overview

Account

Clearly Better... 0883

Available Balance: \$11,000.00

Paperless Settings: ^

Statements: [Enrolled](#)

[Transactions](#) [Account Details](#) [Account Services](#)

Filter

Export

November 20, 2025

From Checking 6311005607
Online Transfer

+\$10,000.00
\$11,000.00

November 18, 2025

Dda Deposit
Deposit

+\$1,000.00
\$1,000.00

Show More

Company

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Resources

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PENNSYLVANIA VEHICLE REGISTRATION

PennDOT is proud to provide you with your new registration credential.

PLEASE SIGN YOUR CREDENTIAL - To validate your credential, you need to sign your name in ink as indicated below. The registration must be available when the vehicle is in use.

DID YOU CHANGE YOUR ADDRESS? - It is important that we have your current address, and the law requires that any changes be reported to PennDOT within 15 days. Please notify PennDOT of any address change by writing to: PennDOT, Bureau of Motor Vehicles, Harrisburg, PA 17104-2516. Please include the following information with your change of address request: your full street address (including P.O. box number, rural delivery, route number or apartment number, if applicable), city, state and zip code. Please remember P.O. box numbers may be used in addition to the actual address, but cannot be used as the only address. You may also change your address online at Online Services Center at WWW.DMV.PA.GOV.

PENNSYLVANIA'S LITTERING LAWS - As a reminder, Pennsylvania has laws against littering on our roadways and on public and private property. Under law, PennDOT is required to include this statement on vehicle credentials to remind motorists of littering laws. By signing your registration credential, you acknowledge that you have received notice of this provision.

Section 3709 of the Pennsylvania Vehicle Code provides for a fine of up to \$300 for dropping, throwing or depositing, upon any highway, or upon any other public or private property without the consent of the owner thereof or into or on the waters of this Commonwealth from a vehicle, any waste paper, sweepings, ashes, household waste, glass, metal, refuse or rubbish or any dangerous or detrimental substance, or permitting any of the preceding without immediately removing such items or causing their removal.

For any violation of Section 3709, you may be subject to a fine of up to \$300 upon conviction, including any violation resulting from the conduct of any other persons operating, in possession of or present within the vehicle with your permission, if you do not with reasonable certainty identify the driver of the vehicle at the time the violation occurred.

PLEASE DRIVE SAFELY AND REMEMBER TO BUCKLE UP

COMMONWEALTH OF PENNSYLVANIA REGISTRATION CREDENTIAL

EXPIRY: MAY 31, 2026 VALID: 05/29/2025

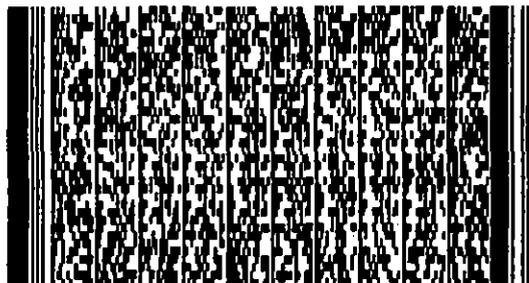
PLATE: KSH4385
TITLE: _____
VIN: _____
YR/MAKE: 2019 NISSAN
TYPE: SDN
WID: 25149 2810 010505

Kimberly J. Exley
David J. Conroy
SIGNATURE

I hereby acknowledge this day that I have received notice of the provisions of Section 3709 of the Vehicle Code.

EMISSIONS INSPECTION REQUIRED/DIESEL VEHICLES EXEMPT COUNTY: ERIE

KIMBERLY J EXLEY &
DAVID J CONROY
875 MAPLE HILL DR
ERIE PA 16509





0014971560

B0957-3347 11/05/2025 8:55 AM Received by Pennsylvania Department of State



COMMONWEALTH OF PENNSYLVANIA
 Department of State
 Bureau of Corporations and Charitable Organizations
 PO Box 8722
 Harrisburg, Pennsylvania 17105-8722
CERTIFICATE OF ORGANIZATION -
LIMITED LIABILITY COMPANY
 Fee: \$125

Pennsylvania Department of State
-FILED-
 File #: 0014971560
 Date Filed: 11/5/2025

DSCB:15-8821 (rev. 2/2017)

In compliance with the requirements of 15 Pa.C.S. § 8821 relating to certificate of organization), the undersigned desiring to organize a limited liability company, hereby certifies that:

Limited Liability Company Type					
Filing type	Domestic Limited Liability Company				
Limited liability company subtype	Limited Liability Company				
Limited Liability Company Name					
Entity name	Carriage Concierge Transportation Services LLC				
Effective Date					
The filing shall be effective when filed with the Department of State					
Registered Office					
The name of the commercial registered office provider and the county of venue is					
Registered Agents Inc					
Commercial Registered Office Provider					
Venue and Publication County	ERIE				
Organizers					
<table border="1"> <thead> <tr> <th>Name of individual or organization</th> <th>Address</th> </tr> </thead> <tbody> <tr> <td>Registered Agents Inc</td> <td>502 W 7TH ST STE 100 ERIE, PA 16502-1333</td> </tr> </tbody> </table>		Name of individual or organization	Address	Registered Agents Inc	502 W 7TH ST STE 100 ERIE, PA 16502-1333
Name of individual or organization	Address				
Registered Agents Inc	502 W 7TH ST STE 100 ERIE, PA 16502-1333				
Additional provisions, if any					
Additional provisions					
<input type="checkbox"/> I qualify for a veteran/reservist-owned small business fee exemption (see help)					
Electronic Signature					
IN TESTIMONY WHEREOF, the organizer(s) has (have) executed this Certificate of Organization.					
<i>Robin Jones</i>	11/05/2025				
Registered Agents Inc	Date				



Pennsylvania Department of State
Bureau of Corporations and Charitable Organizations
PO Box 8722 | Harrisburg, PA 17105-8722
T: 717.787.1057
dos.pa.gov/BusinessCharities

November 5, 2025

Registered Agents Inc
502 W 7TH STREET
SUITE 100
ERIE, PA 16502

Entity Name: Carriage Concierge Transportation Services LLC
Entity File Date: November 5, 2025
Entity Number: 0014971560
Filing Type: Domestic Limited Liability Company

The Bureau of Corporations and Charitable Organizations is happy to send your filed document. The Bureau is here to serve you and we would like to thank you for doing business in Pennsylvania.

Thank you for registering with the Department of State to do business in Pennsylvania. Like many other businesses, you may have employees, sell taxable products, or provide a taxable service to consumers in Pennsylvania. Please visit www.pa100.state.pa.us to register for business taxes with the Department of Revenue and the Department of Labor and Industry. You may also visit www.Business.pa.gov to find resources for businesses through all stages of development.

Beginning in 2025, annual reports are required for all domestic filing entities, limited liability general partnerships and registered foreign associations. More information will be forthcoming from the Bureau. However, to ensure that you receive notice of how and when to make annual reports, keep all information on file with the Bureau up-to-date, particularly registered office address.

OPERATING AGREEMENT

FOR

Carriage Concierge Transportation Services LLC

A SINGLE MEMBER-MANAGED LIMITED LIABILITY COMPANY

ARTICLE I

Company Formation

- 1.1. **FORMATION.** The member has formed a Limited Liability Company (the "Company") according to the laws of the state in which the Company was formed. This operating agreement is entered into and effective as of the date it is adopted by the member.
- 1.2. **REGISTERED AGENT.** The name and location of the Company's registered agent will be stated in the company's formation documents.
- 1.3. **TERM.** The Company will continue perpetually unless:
 - (a) The sole member resolves to dissolve;
 - (b) Any event which causes the Company's business to become unlawful;
 - (c) The death, resignation, expulsion, bankruptcy, retirement of the sole member or the occurrence of any other event that terminates the continued membership of a member of the Company; or
 - (d) Any other event causing dissolution of the Company under applicable state laws.
- 1.4. **CONTINUANCE OF COMPANY.** In the event of an occurrence described in Section 1.3(c), the Company will expire and may be administratively dissolved.
- 1.5. **BUSINESS PURPOSE.** The Company will conduct any lawful business deemed appropriate in carrying out the Company's objectives.
- 1.6. **PRINCIPAL PLACE OF BUSINESS.** The Company's principal place of business will be stated in the formation documents, or as later selected by the member.
- 1.7. **THE MEMBER.** The name and residential address of the sole member is listed in Certification of Member section of this agreement.

- 1.8. **ADMISSION OF ADDITIONAL MEMBERS.** Additional members may only be admitted to the Company through a Certificate of New Membership issuance by the company of new interest in the Company or as otherwise provided in this agreement.

ARTICLE II Capital Contributions

- 2.1. **INITIAL CONTRIBUTIONS.** The member will initially contribute capital to the Company, as described in Exhibit 1 attached to this agreement. The agreed total value of such property and cash is _____.
- 2.2. **ADDITIONAL CONTRIBUTIONS.** Except as provided in ARTICLE 6.2, no member will be obligated to make any additional contribution to the Company's capital.

ARTICLE III Profits, Losses and Distributions

- 3.1. **PROFITS/LOSSES.** For financial accounting and tax purposes, the Company's net profits or net losses will be determined on an annual basis. These profits and losses will be allocated to the member as set forth in this agreement below, as amended, and in accordance with Treasury Regulation 1.704-1.
- 3.2. **DISTRIBUTIONS.** The member will determine and distribute available funds annually or as they see fit. "Available funds" refers to the net cash of the Company available after expenses and liabilities are paid. Upon liquidation of the Company, distributions will be made in accordance with the positive capital account balances or pursuant to Treasury Regulation 1.704-1(b)(2)(ii)(b) (2). To the extent the member has a negative capital account balance, there will be a qualified income offset, as set forth in Treasury Regulation 1.704-1(b)(2)(ii)(d).

ARTICLE IV Management

- 4.1. **MANAGEMENT OF THE BUSINESS.** The member is responsible for the management of the Company.
- 4.2. **MEMBERS.** The liability of the member will be limited according to state law.
- 4.3. **POWERS OF MEMBERS.** The member is authorized on the Company's behalf to make decisions as to:
- (a) the sale, development, lease, or other disposition of the Company's assets;
 - (b) the purchase or other acquisition of other assets;
 - (c) the management of all or any part of the Company's assets;
 - (d) the borrowing of money and the granting of security interests in the Company's assets;
 - (e) the pre-payment, refinancing, or extension of any loan affecting the Company's assets;

- (f) the compromise or release of any of the Company's claims or debts; and
- (g) the employment of persons, firms, or corporations for the operation and management of the Company's business.

The member is further authorized to execute and deliver:

- (w) all contracts, conveyances, assignments leases, sub-leases, franchise agreements, licensing agreements, management contracts and maintenance contracts covering or affecting Company assets;
- (x) all checks, drafts, and other orders for the payment of the Company's funds;
- (y) all promissory notes, loans, security agreements, and other similar documents; and
- (z) all other instruments of any other kind relating to the Company's affairs.

4.4. **NOMINEE.** Title to the Company's assets must be held in the Company's name or in the name of any nominee that the member may designate. Pursuant to the powers listed in Section 4.3, the member has the power to enter into a nominee agreement with any such person, and such agreement may contain provisions indemnifying the nominee, except for his or her willful misconduct.

4.5. **EXCULPATION.** Any act or omission of the member, the effect of which may cause loss or damage to the Company, if done in good faith to promote the best interests of the Company, will not subject the member to any liability.

4.6. **INDEMNIFICATION.** The Company will indemnify any person who was or is a party defendant or is threatened to be made a party defendant, in a pending or completed action, suit or proceeding, whether civil, criminal, administrative, or investigative (other than an action by or in the right of the Company) by reason of the fact that the person is or was a member of the Company, employee, or agent of the Company, or is or was serving at the request of the Company, for instant expenses (including attorney's fees), judgments, fines, and amounts paid in settlement actually and reasonably incurred in connection with such action, suit or proceeding if the member determines that the person acted in good faith and in a manner he or she reasonably believed to be in or not opposed to the best interest of the Company, and with respect to any criminal action proceeding, has no reasonable cause to believe his or her conduct was unlawful. The termination of any action, suit, or proceeding by judgment, order, settlement, conviction, or upon a plea of "no lo Contendere" or its equivalent, does not in itself create a presumption that the person did or did not act in good faith and in a manner which he or she reasonably believed to be in the best interest of the Company, and, with respect to any criminal action or proceeding, had reasonable cause to believe that his or her conduct was lawful.

4.7. **RECORDS.** The member must keep the following at the Company's principal place of business or other location:

- (a) A current list of the full name and the last known street address of each member;
- (b) A copy of the Articles of Organization, this operating agreement, and all amendments to either document;

- (c) Copies of Company's federal, state and local income tax returns and reports for the three (3) most recent years;
- (d) Copies of the Company's financial statements for the three (3) most recent years.

ARTICLE V Compensation

- 5.1. **MANAGEMENT FEE.** The member rendering services to the Company is entitled to compensation proportionate with the value of those services.
- 5.2. **REIMBURSEMENT.** The Company must reimburse the member for all direct out-of-pocket expenses incurred in managing the Company.

ARTICLE VI Bookkeeping

- 6.1. **BOOKS.** The member will maintain a complete and accurate accounting of the Company's affairs at the Company's principal place of business. The member may select the method of accounting and the company's accounting period will be the calendar year.
- 6.2. **MEMBER'S ACCOUNTS.** The member's capital account will be determined and maintained in the manner set forth in Treasury Regulation 1.704-1(b)(2)(iv) and will consist of his or her initial capital contribution increased by:
 - (a) Any additional capital contribution made by the member;
 - (b) Credit balances transferred from the member's distribution account to his or her capital account;and decreased by:
 - (x) Distributions to the member in reduction of Company capital;
 - (y) The member's share of Company losses if charged to his or her capital account.
- 6.3. **REPORTS.** The member will close the books of account after the close of each calendar year and will prepare a statement of such member's distributive share of income and expense for income tax reporting purposes. The member must keep such statements with the other financial statements kept pursuant to Section 4.7(d).

ARTICLE VII Transfers

- 7.1. **ASSIGNMENT.** The member may sell, assign, or otherwise dispose of all or any part of his or her interest in the Company.

ARTICLE VIII Dissolution

- 8.1. **DISSOLUTION.** The member may dissolve the company at any time. The member may NOT dissolve the company for a loss of membership interests. Upon dissolution the company must

pay its debts first before distributing cash, assets, and/or initial capital to the member or the member's economic interests. The dissolution may only be ordered by the member, not by the owner of the member's economic interests.

CERTIFICATION OF MEMBER

The undersigned hereby agree, acknowledge, and certify that the foregoing operating agreement is adopted and approved by the member as of this 18 day of November, 2025.

Member:

Name David Conroy Percent 100 %

Address 11511 Tamarack Roa Waterford Penns. 16441

X 

**EXHIBIT 1
CAPITAL CONTRIBUTIONS**

Pursuant to ARTICLE 2, the member's initial contribution to the Company capital is stated to be \$ _____. The description and each individual portion of this initial contribution is as follows:

_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

SIGNED AND AGREED this _____ day of _____, 20_____.

Signature of Member

Company Resolution to Open a Bank Account

Account: Checking Bank: Citizens Bank
Holder: Carriage Concierge Transportation Address: 3835 Peach St
Address: Services LLC Eric, PA 16509

Acct #: _____

As a Member of the Company named above, I certify that the Company has been organized within the bounds of state law as a Limited Liability Company with its principal office located at:

11511 Tamarack Road

Waterford

Pennsylv. 16441

I further attest that at the initial meeting of the Company's members held on 18th November, 2025, a quorum was present and voting and adopted the following resolutions:

Resolved, that the financial institution named above is designated as a depository for the funds of this Company, which may be withdrawn on checks, drafts, advices of debit, notes, or other orders for payments bearing any officer or authorized employee of this Company.

Further Resolved, that the financial institution will accept and pay on, without further inquiry, any checks or debits drawn against any of the Company's accounts. The checks or debits will be honored by the financial institution whether the item has been drawn or endorsed to the order of any authorized officer or employee signing; tendered by the authorized officer or employee for the purpose of cashing or payment; or for deposit to the officer's or employee's personal account. The financial institution will not be required to inquire as to the use of any check or debit signed in accordance with the resolutions contained herein.

Further Resolved, that the officers or authorized employees may execute other agreements, including, but not limited to, special depository agreements, and arrangements concerning the manner, condition, and/or purposes for which funds, checks, debits, or items of the Company may be deposited, collected, or withdrawn, as long as these other agreements are not contrary to the provisions contained in this resolution.

Further Resolved, that the power granted to the Company's officers or authorized employees will remain in full force and effect until written notice has been delivered and received by the financial institution at each location where an account is maintained. The financial institution will be indemnified and held harmless from any losses suffered or liabilities incurred by continuing to act in accordance with this resolution.

I Further Attest that the persons named below occupy the stated positions, as indicated by their signatures, and that the resolutions contained in this document are recorded on the books of the Company, and these resolutions are in full force and effect and have not been altered in any way.

[Signatures on the following page]

I Agree to all of the above on this 18 day of November, 2025.

CERTIFIED TO AND ATTESTED BY:

X David E. Conway
Company Member:

LLC MEMBERSHIP CERTIFICATE

Company Name
Organized in _____ has a total of _____ member(s) at _____ date

This certifies that _____ is a member of the above named Limited Liability Company, and holds a _____% interest of the above named company, which is entitled to the full benefits of such membership.

Such benefits are subject to the membership duties and obligations set forth in the Limited Liability Company operating agreement.

This named Limited Liability Company has caused this certificate to be executed by its members this _____ day of _____ A.D.

Named Member

Witness and/or member

For sold:

For _____ received, I, _____ sell and transfer unto _____, _____% of the membership interest, represented within this certificate, and appoint _____

_____ to transfer the allocated interest in the books of the named Limited Liability Company with full power of substitution.

Seller

Newly named member

Witness

Docket No. A-2025-3058351
Carriage Concierge Transportation Services LLC

Request for Information

1.) Question # 10 of the Application.

- A.) The authority description is not acceptable. You filed a Call or Demand (Taxi) application but also mentioned Uber which is a different authority entirely (TNC). Please clarify your request by responding with a clear statement to amend the authority, with that said authority's completed application, or verify that the below example is what you now intend. —

Example: To transport persons, by motor vehicle, in Call or Demand service....

*Note: Taxi authority has specific service standards and vehicle requirements such as metered rates and dome lights. Please reference 52 Pa. Code Section 29 online, which may be accessed at www.pacode.com.

Review the statues found in Title 66 Chapter 26 to see if you qualify to operate as a Transportation Network Company (TNC).

<https://www.palegis.us/statutes/consolidated/view-statute?txtType=HTM&ttl=66&div=0&chpt=26>

Also review the Paratransit application to see if this authority reflexes the service you intend to provide at <https://www.puc.pa.gov/motor-carrier/forms-applications/>.

- B.) The territory description is not acceptable. Terms such as “surrounding areas” are insufficiently specific. The description of the territory needs to have clear boundaries and

is typically requested by originating county/counties. Please make corrections with the Commission's criteria in mind.

Example: ... from points in the counties of X, Y, and Z, to points in Pennsylvania, and return.

(Question 10)

To TRANSPORT people upon Call or Demand in City of ERIE and Counties of Millcreek and Summit from Summit County. Rides will originate in ERIE and clients returned to their requesting location

2.) Question # 1 and 2 of the Verified Statement.

The responses to these questions were omitted. Please answer as this is not optional.

1) I David Contoy am making verified statement as the owner. Owner is not affiliated with any other carrier

3.) Question # 4 of the Verified Statement.

Please include the plan on how you are to secure customers' sensitive physical documents.

Customers will be secured via my phone, facebook website, ~~my~~ yahoo mail account, and Square Appointment app

4.) Question # 5 of the Verified Statement.

Provide compliant policies that satisfy the requirements of 52 Pa Code with revision to the specific chapters below in case of expansion. This is not optional. Please review Title 52 information online, which may be accessed at www.pacode.com.

A.) § 29.503. Age restrictions. Will drivers have to be at least a certain minimum age?

a) Hiring standards, Drivers will be 25 years of age or older, having their own personal Insurance & state Issued Drivers License. B Background checks will be done via Motor Vehicle Dept & Criminal through people finders. c) Drivers will have valid license for Driving d) Will do checks with DMV. E zero tolerance for Drug use or alcohol

B.) § 29.504. Driver's license checks. How will you conduct license checks? Will this check be done initially and how often will this be done? How will you make sure it is done on a set schedule?

Drivers license will be checked prior to employment and every year thereafter

C.) § 29.505. Criminal history. Will you check yourself, or will you use the PA State Police "PATCH" program. Will this check be done initially and how often will this check be done? Give examples of disqualifications of employment? How will you make sure it is done on a set schedule?

Will use PA police patch program, Criminal background checks will be done thereafter on anniversary of employment. Suspicion of criminal activity will be checked immediately

D.) § 29.506 Alcohol prohibition and § 29.507 Controlled substance prohibition. Who will be conducting drug/alcohol tests? How long will a driver have to wait after using alcohol and/or substances, which would affect driving before the driver will be permitted to drive?

If Driver has been Discovered in use of Alcohol or abuse through a positive screen they will be terminated

E.) Finally, you must explain your policy regarding your driver training program beyond saying that only will be offered and completed. Please furnish the program on separate pages and attach it to your reply to us.

Will look into Training Programs that can be tailored to the training they will need for example a new hire will need 6hrs compared to if we want to retrain. Drive Safe Online offers certificate of completion so we can track. Samba Safety has more than 400 courses, Wheels is option as well

5.) Question # 6 of the Verified Statement.

Provide the requested VIN number.

JN1BJ1CR 9KW 346928

6.) Financial Position (balance sheet).

A.) Please verify that all assets and debts listed (for example: vehicle loan balances/vehicle asset value, etc.) in the submitted balance sheet are held by the applicant (Carriage Concierge Transportation Services LLC) and not the member(s). Any property listed MUST be held to the company which is applying for authority. In your submission, you provided information which states the company has an IRA and a mortgage. We need to know if the applicant is co-mingling its assets/debts, which is not permissible. If you have erroneously comingled the applicant's company assets/debts with those of the company member's personal assets/debts, then a revised balance sheet with an explanation of what was changed and why, is required.

*Attached only assets since can not Co-Mingle
js Bank Balance. Can not transfer Title as car is
Bank owned. Registration will reflect change to business*

B.) The balance sheet that was submitted with the application was not dated, and it reflected that the LLC has only \$2,900 in cash assets. Based on the balance sheet's cash assets of Carriage Concierge Transportation Services LLC lacks the financial position to gain a Certificate of Public Convenience. Please submit an improved and dated balance sheet that shows that the company has financial fitness to provide safe, efficient, and reliable service.

- To show improved financial fitness you should show a higher cash asset amount that matches the requested below LLC's bank account statement. It is expected that the applicant's account is now filled and ready to commence operations. Any assets which may need transferred to the applicant should happen prior to adding them to the balance sheet.
- Please ensure that the figures provided are accurate as of the date provided on the balance sheet, and that all figures provided are based on the best available information. The information is to be exact and should not include estimates or approximations when accurate numbers are available.

C.) To fully assist the Commission in determining financial fitness please submit copies of the claimed vehicle registration and/or title and a recent bank account statement, ALL in the name of Carriage Concierge Transportation Services LLC.

- The bank statement(s) account numbers may be redacted. You may choose instead to submit a notarized/official statement(s) of Carriage Concierge Transportation Services LLC's finances provided by bank officers. Please make sure their contact information is current.

NOTE: It is the responsibility of the applicant seeking motor common carrier authority to demonstrate that it possesses the financial ability to provide the proposed service. As per 52 Pa. Code §41.14, applications may be denied if the applicant fails to satisfy fitness standards. Be advised that additional corrections may not always be requested; therefore, prior to submitting your responses, your consultation with an attorney or financial expert familiar with Commission regulated Motor Carrier-related proceedings is highly encouraged.

Statement of Financial Position (Balance Sheet)
 As of (date) 11/20/25
 (Must be less than 6 months old)

ASSETS

Current Assets		
Cash	<u>11,000</u>	
Other Current Assets (specify)	<u>0</u>	
Total Current Assets		<u> </u>
Tangible Assets		
* Motor Vehicle Equipment	<u>0</u>	
Property (buildings, land, etc.)	<u>0</u>	
Office Equipment		
	TOTAL ASSETS	<u><u>11,000</u></u>

LIABILITIES

* Current Liabilities (Due within one year of date)		
Loans	<u>0</u>	
Credit cards/revolving credit	<u>0</u>	
Other Liabilities (Attach schedule)	<u>0</u>	
Total Current Liabilities		<u>0</u>
Long Term Liabilities (Due after one year of date)		
Mortgage	<u>0</u>	
Long term commercial loan	<u>0</u>	
Other Liabilities (Attach Schedule)	<u>0</u>	
Total Long-Term Liabilities		<u>0</u>
	TOTAL LIABILITIES	<u><u> </u></u>

Asset -
 - CAR can only be registered in Business NAME, since loan is bank owned was informed Can not be used as Asset.

Liability:
 There are no mortgages, credit cards, or any long term debt associated with Business.

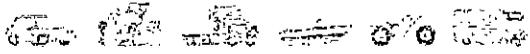
Your ID Cards

Keep these cards handy—in your glove compartment or wallet. And contact us anytime you have a question or need to report a claim.

If you have a claim, we'll get you back on the road as soon as possible. And while you'll always have a choice where to repair your vehicle, when you use a shop in our preapproved network, we'll guarantee your repair for as long as you own or lease your vehicle.

Thank you for choosing Progressive.



<p>Carriage Concierge Transportation Services LLC</p>  <p>Form A023 PA (10/20)</p> <p>IF YOU'RE IN AN ACCIDENT</p> <ol style="list-style-type: none">1. Remain at the scene. Don't admit fault.2. Find a safe location, call the police, and exchange driver information.3. Call Progressive right away. <p>TO REPORT A CLAIM Call 1-800-274-4499 or go to claims.progressive.com.</p> <p>PROGRESSIVE</p> <p>KEEP THIS CARD IN YOUR VEHICLE WHILE IN OPERATION.</p>	<p>FINANCIAL RESPONSIBILITY IDENTIFICATION CARD PENNSYLVANIA</p> <p>Policy Number: 865911464 NAIC Number: 11770 Effective Date: 11/18/2025 Expiration Date: 05/18/2026 Policy Type: Commercial NOT VALID MORE THAN 1 YEAR FROM EFFECTIVE DATE Insurer: United Financial Casualty Company 1-800-895-2886 PO Box 94739 Cleveland, OH 44101</p> <p>Named Insured(s): Carriage Concierge Transportation Services LLC 11511 TAMARACK RD WATERFORD, PA 16441</p> <p>Year Make Model VIN 2019 NISSAN ROGUE SPORT JN1B1CR9KW346928</p> <p>TEMPORARY</p> <p>This card must be carried for production upon demand. It is suggested that you carry this card in the insured vehicle.</p> <p>WARNING: Any owner or registrant of a motor vehicle who drives or permits a motor vehicle to be driven in this State without the required financial responsibility may have his registration suspended or revoked.</p> <p>NOTE: THIS CARD IS REQUIRED WHEN:</p> <ol style="list-style-type: none">(1) You are involved in an auto accident.(2) You are convicted of a traffic offense other than a parking offense that requires a court appearance.(3) You are stopped for violating any provision of 75 Pa.C.S. (relating to Vehicle Code) and requested to produce it by a police officer. <p>You must provide a copy of this card to the Department of Transportation when you request restoration of your operating privilege and/or registration privilege which has been previously suspended or revoked.</p>
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IMPORTANT NOTICE Regarding your Financial Responsibility Insurance Identification Card.

United Financial Casualty Company is required by Pennsylvania law to send you an I.D. card. The card shows that an insurance policy has been issued for the vehicle(s) described satisfying the financial responsibility requirements of the law.

If you lose the card, contact your insurance company or agent for a replacement. The I.D. card information may be used for vehicle registration and replacing license plates. If your liability policy is not in effect, the I.D. card is no longer valid.

You are required to maintain financial responsibility on your vehicle. It is against Pennsylvania law to use the I.D. card fraudulently such as using the card as proof of financial responsibility after the insurance policy is terminated.

Named insured

Carriage Concierge Transportation Services LLC
11511 TAMARACK RD
WATERFORD, PA 16441

Policy number: 865911464

Underwritten by:
United Financial Casualty Company
November 19, 2025
Policy Period: Nov 18, 2025 - May 18, 2026
Page 1 of 2

progressivecommercial.com

Online Service
Make payments, check billing activity, print policy documents, update your policy or check the status of a claim.

1-800-895-2886

For customer service and claims service,
24 hours a day, 7 days a week.

Commercial Auto Insurance Coverage Summary

This is your Declarations Page

This form is nonparticipating with regard to paying dividends to policyholders.

Your coverage began the later of November 18, 2025 at 12:01 a.m. or the effective time shown on your application. This policy period ends on May 18, 2026 at 12:01 a.m.

Your insurance policy and any policy endorsements contain a full explanation of your coverage. The policy limits shown for an auto may not be combined with the limits for the same coverage on another auto, unless the policy contract allows the stacking of limits. The policy contract is form 6912 (02/19). The contract is modified by forms 2852PA (10/20), 1652PA (02/19), Z311 (02/19), 4881PA (02/19), 4852PA (02/19) and Z228 (01/11).

The named insured organization type is a corporation.

COLLISION COVERAGE FOR RENTAL VEHICLES

IF THIS POLICY PROVIDES COLLISION COVERAGE ON A PRIVATE PASSENGER VEHICLE, IT WILL APPLY TO A PRIVATE PASSENGER VEHICLE YOU RENT IF THE RENTAL IS COVERED AS A "TEMPORARY SUBSTITUTE AUTO" AS PROVIDED FOR IN PART II OF THIS POLICY.

Outline of coverage

Description	Limits	Deductible	Premium
Liability To Others			\$373
Bodily Injury Liability	\$50,000 each person/\$100,000 each accident		
Property Damage Liability	\$25,000 each accident		
Uninsured Motorist - Nonstacked	\$25,000 each person/\$50,000 each accident		27
Underinsured Motorist - Nonstacked	\$25,000 each person/\$50,000 each accident		54
Basic First Party Benefit - Full Tort			17
Medical Expense Benefit Without Workers Comp	up to \$10,000		
Income Loss Benefit Without Workers Comp	up to \$2,500 each month/\$50,000 maximum		12
Comprehensive			109
See Auto Coverage Schedule	Limit of liability less deductible		
Collision			646
See Auto Coverage Schedule	Limit of liability less deductible		
Rental Reimbursement			24
See Auto Coverage Schedule			
Total 6 month policy premium			\$1,262

Rated drivers

1. DAVID CONROY
2. KIMBERLY J CONROY

Auto coverage schedule

1. **2019 NISSAN ROGUE SPORT** Stated Amount: * \$15,000 (including Permanently Attached Equip)
 VIN: **JN1BJ1CR9KW346928** Garaging Zip Code: 16441 Radius: 50 miles
 Personal use: Y Body type: Sport Utility Vehicle

Liability Premium	Liability Premium \$373	UM Premium \$27	UM Premium \$54	PIP Premium \$17	Income Loss Premium \$12	
Physical Damage Premium	Comp Deductible \$1,000	Comp Premium \$109	Collision Deductible \$1,000	Collision Premium \$646		
Other Coverages Premium	Rental Limit \$50 per day Max \$1,500	Rental Premium \$24				Auto Total \$1,262

*A vehicle's stated amount should indicate its current retail value, including any special or permanently attached equipment. In the event of a total loss, the maximum amount payable is the lesser of the Stated Amount or Actual Cash Value, less deductible. Be sure to check stated amount at every renewal in order to receive the best value from your Progressive Commercial Auto policy.

Loss Payee information

1. Loss Payee Auto 1 TENDTO CREDIT UNION
 1129 STATE ST
 ERIE, PA 16501
 2019 NISSAN ROGUE SPORT (JN1BJ1CR9KW346928)

Penalty for Insurance Fraud

Any person who knowingly and with intent to defraud any insurance company or other person files an application for insurance or statement of claim containing any materially false information or conceals for the purpose of misleading, information concerning any fact material thereto commits a fraudulent insurance act, which is a crime and subjects such person to criminal and civil penalties.

Notice of personal use surcharge

A surcharge in the amount of 10% of your premium for coverage under Liability to Others, Damage to your Auto and First Party Benefits has been added to your policy because an insured vehicle is used for personal purposes. This surcharge remains in effect as long as you use the vehicle for personal purposes.

Company officers

Cory W. Fincher

President

Patricia H. Convent

Secretary

U



[View larger](#)

Pulsar 2030 Taximeter

Reference: pulsar_2030

Condition: New product

The Pulsar 2030 features a bright display and simple operation. The four buttons used for normal daily meter activity are flanked by additional buttons, used for printing and special functions.

73 items

[Twitter](#) [Share](#) [Google+](#) [Pinterest](#)

[Send to a friend](#)

[Print](#)

\$245.00

Quantity

1

[Add to cart](#)

[Add to wishlist](#)

MORE INFO

The meter can be interfaced with automobile electronics or older transducer systems via an external module called a "Sendy Pulse Tracker" that allows conditioning and dividing functions without opening the meter shell for adjustment setting. It makes the vehicle's information source and the meter talk to each other properly. & IT IS PACKED IN THE CARTON WITH THE METER & HARNESS, FREE!

Upon receiving PUC# we will purchase Taxi Meter in accordance with PA-PUC Code



View larger

5700 Taximeter

Reference: a700_a170_combo

Condition: New product

Centrodynemeter's newest slim line taximeter, "5700", features a 6 PB interface, even more vivid display, daytime adjustable intensity, all on a single PCB, packaged in a sleek designer's case. This new series presents a completely new design, while continuing to uphold Centrodynemeter's tradition of developing quality products. The 5700 provides a wide range of end-user options.

94 items

[T](#) [f](#) [S](#) [P](#)

Send to a friend

Print

\$249.00

Quantity

Add to cart

Add to wishlist



MORE INFO

Some of the more outstanding characteristics of the 5700 are:

- A Single Printed Circuit Board
- Display Brightness Control
- 6 Illuminated Push Buttons
- Add/Subtract Extras
- 16 Rates Standard
- Flat Rate Entry
- Auto Rate Changes
- Speed Limit Programmable
- 3 Level Password Security
- Small (6.29" x 1.97" x 1.19")
- Lightweight (less than 5 ounces)
- Communication via Bluetooth, USB or RS232
- Web Based Updates, Rate Changes
- Electronic Sealing of Installation (ESI)
- View/Print Rates, Configuration
- Daily & Total Statistics
- Trip Data Memory Storage
- Calibration Check
- Available Plug-In Installation (if ordered and pre-wired with a Z059)
- Plug & Play Add On Features (plug in printers, swipe, etc)

Business Plan: Carriage Concierge Transportation

1. Executive Summary

Carriage Concierge Transportation (CCT) is a premium yet affordable taxi service designed to provide safe, reliable, and customer-focused rides. Based in Erie, Pennsylvania, CCT will serve local residents, visitors, and corporate clients who need dependable transportation without the uncertainty of rideshare apps.

Our competitive advantage lies in personalized customer service, clean vehicles, professional drivers, and technology-driven dispatching that ensures on-time pickups and transparent pricing. CCT aims to become the go-to local taxi brand, combining old-fashioned reliability with modern convenience.

Mission Statement:

To redefine the taxi experience by delivering comfort, safety, and convenience for every ride.

Vision Statement:

To be recognized as the most trusted and customer-focused transportation provider in our market.

2. Company Overview

- **Name:** Carriage Concierge Transportation, LLC
 - **Business Type:** Taxi & transportation service (LLC)
 - **Services Offered:**
 - Standard taxi rides (local trips, hourly, airport transfers)
 - Corporate accounts for businesses
 - Concierge-style bookings for hotels, hospitals, and events
 - Future expansion: luxury and non-emergency medical transport
 - **Value Proposition:** Unlike rideshare companies with surge pricing and inconsistent drivers, CCT provides reliable service with set pricing, professional drivers, and a concierge-level customer experience.
-

3. Market Analysis

Industry Overview

The U.S. taxi and limousine service market remains stable, with demand driven by airport transfers, city rides, business travel, and tourists. Localized services continue to compete successfully with Uber/Lyft by focusing on **personal service, availability, and community trust.**

Target Market

1. **Local Residents** – Daily commutes, errands, and non-drivers.
2. **Business Travelers & Corporations** – Reliable airport and office transfers.
3. **Tourists/Visitors** – Hotels, entertainment venues, and event transportation.
4. **Hospital/Medical Clients** – Patients needing safe and timely rides.

Competitive Landscape

- **Strengths of Uber/Lyft:** Tech convenience, large driver pool.
 - **Weaknesses:** Surge pricing, inconsistent driver quality, lack of local loyalty.
 - **CCT Advantage:** Local trust, fixed transparent rates, dedicated service partnerships, concierge-level scheduling.
-

4. Marketing & Sales Strategy

- **Branding:** "Concierge-level service in every ride."
- **Channels:**
 - Partnerships with hotels, airports, hospitals, and event venues
 - Digital ads (Google Maps, local search, social media)
 - Printed flyers and business cards in strategic locations
 - Corporate outreach to businesses for account-based rides
 - Advertising via Direct to Consumer (Local Businesses, Manufacturing, Hospitals, Mall, Hotels, Restaurants, and Doctors Offices)
 - Press Releases to Local News Stations (WSEE, WQLN, WJET)
 - Launch Party to gain Capital Investment, and Interest

- GECAC which constitutes thousands of elderly clients. GECAC is one of the largest Medicare Support Organizations in Northwest PA
 - **Sales Strategy:**
 - Loyalty program for repeat customers
 - Discount packages for corporate accounts and hotel partnerships
 - 24/7 dispatch hotline + online booking app for convenience
-

5. Operations Plan

- **Fleet:** Start with clean, well-maintained sedans/minivans.
 - **Drivers:** Professional, uniformed, licensed drivers with background checks.
 - **Dispatch System:** Phone, website, and mobile booking platform with GPS tracking.
 - **Service Hours:** 24/7 availability.
 - **Location:** Based near key demand centers (airport, downtown, hotels).
-

6. Management & Staffing

- **Owner/Founder:** Dave Conroy– Responsible for strategy and operations.
 - **Vice President Business Development and Human Relations:** Kimberly Conroy- Responsible for all aspects of Human Resources, Marketing, Scheduling Appointments, and acts as Community Liasson for booking events and attending social functions.
 - **Dispatch Manager:** TBT Oversees bookings, routing, and customer service.
 - **Drivers:** TBT, Professional, trained staff committed to safety and service.
 - **Admin/Marketing Support:** TBT, Handles billing, partnerships, and promotions.
-

7. Financial Plan

Startup Costs (Estimated)

- Vehicle purchase/lease (5 taxis): \$125,000
- Licensing & permits: \$10,000

- Insurance: \$15,000
 - Dispatch software/website/app: \$20,000
 - Branding & marketing: \$7,500
 - Office & operations setup: \$5,000
- Total Startup Estimate: ~\$182,500**

Revenue Streams

- Standard taxi fares
- Airport transfer flat fees
- Corporate contracts
- Hotel/concierge referral agreements

Financial Projections (Year 1–3)

- **Year 1 Revenue:** \$350,000 | Net Profit: \$50,000
 - **Year 2 Revenue:** \$500,000 | Net Profit: \$100,000
 - **Year 3 Revenue:** \$750,000 | Net Profit: \$200,000
-

8. Growth Strategy

- Expand fleet to meet demand.
 - Launch mobile booking app with payment integration.
 - Add specialized services (luxury black car service, medical transport).
 - Establish regional brand recognition through partnerships and advertising.
-

9. Risk Analysis

- **Competition:** Rideshares continue expanding – mitigated through personal service and local loyalty.
- **Fuel/Insurance Costs:** May rise – mitigated by fuel-efficient fleet and bulk insurance negotiations.
- **Driver Shortage:** Competitive pay and retention programs to keep top drivers.

10. Conclusion

Carriage Concierge Transportation is positioned to deliver **dependable, concierge-style taxi service** in a market where customers crave reliability, safety, and a personal touch. With the right investment and partnerships, CCT can become the trusted local brand for transportation needs, outpacing impersonal rideshare competition.

New Business Loan Readiness Timeline

Month 0–3 (Pre-Launch / Idea Stage)

- Write a business plan (goals, target market, competition, financial projections)
- Open a business bank account
- Register your business legally (LLC, Corp, OBA, etc.)

Funding Options: personal savings, friends/family, grants, crowd
Not ideal for loans yet — lenders want proof of revenue or collateral,

Month 3–6 (Early Operations)

- Track revenue & expenses
- Build business credit
Apply for a business credit card
vendor accounts that report to bureaus

Funding Options: SBA Microloan, community development lenders
Online lenders (short term working capital)

Month 6–12 (Growing Stage)

- Prepare financial statements
Profit & Loss (P&L)
Balance Sheet + Cash Flow Statement
- Separate business and personal finances

Funding Options: SBA Microloan, equipment financing, Lines of credit
Online lenders (Eetrainers are stable)

Rule of Thumb

○ Before 6 months: focus on grants, microloans, personal financing

- 8 months of revenue history
Most banks and SBA lenders requires
- 6-12 months: small business lenders may consider you
- 12+ months: best chance for traditional

Your answers should be verified per 52 Pa Code § 1.36. Accordingly, you must provide the following statement with your responses:

I, David Conroy hereby state that the facts set forth are true and correct to the best of my knowledge, information and belief, and that I expect to be able to prove the same at a hearing held in this matter. I understand that the statements herein are made subject to the penalties of 18 Pa.C.S. § 4904 (relating to unsworn falsification to authorities).

The blank should be filled in with the name of the appropriate company representative, and the signature of that representative should follow the statement.

Failure to comply with this request within 10 working days from the date of this letter will result in the denial of the application.

Please direct any questions to Compliance Specialist Kevin Morgan, Bureau of Technical Utility Services at (717) 787-2687. Faxed or emailed filings are **not** accepted.

Sincerely,



Matthew L. Homsher
Secretary

Enclosure



CMPC

717-705-1952

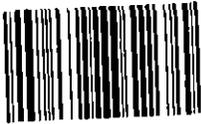
To: PUC SECRETARY BUREAU

Agency: PUC

Floor:

External Carrier: FEDEX

11/26/2025 10:51:30 AM



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DEC 01 2025

PA PUBLIC UTILITY COMMISSION
SECRETARY'S BUREAU

ORIGIN ID:ERIA (814) 602-7993
DAVID CONROY

11511 TAMARACK ROAD

WATERFORD, PA 16441
UNITED STATES US

SHIP DATE: 24NOV25
ACTWGT: 0.40 LB
CAD: B570002/ROSA2670

Part # 158297 2895 HARRISBURG PA 10/26

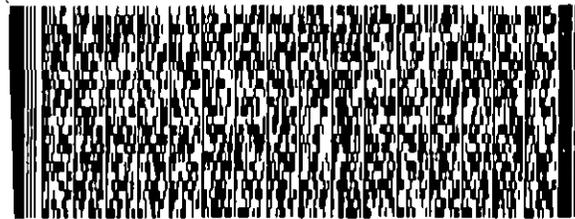
TO MATTHEW L HOMSHER, SECRETARY
PA PUBLIC UTILITY COMMISSION
COMMONWEALTH KEYSTONE BUILDING
400 NORTH STREET
HARRISBURG PA 17120

(717) 787-2687

REF:

THU:

DEPT:



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