AVALON GROVES
COMMUNITY DEVELOPMENT DISTRICT

Advanced Meeting Package

Regular Meeting

Date/Time:
Thursday
August 21, 2025
10:00 a.m.

Location:
Serenoa Club Amenity Center
17555 Sawgrass Bay Blvd.,
Clermont, FL 34714

Note: The Advanced Meeting Package is a working document and thus all materials are considered DRAFTS prior to presentation and Board acceptance, approval or adoption.

Avalon Groves
Community Development District

c/o Vesta District Services
250 International Parkway, Suite 208
Lake Mary, FL 32746
321-263-0132

Board of Supervisors
Avalon Groves Community Development District

Dear Board Members:

The Regular Meeting of the Board of Supervisors of the Avalon Groves Community Development District is scheduled for **Thursday, August 21, 2025** at **10:00 a.m.** at **Serenoa Club Amenity Center – 17555 Sawgrass Bay Blvd., Clermont, FL 34714.**

The advanced copy of the agenda for the meeting is attached along with associated documentation for your review and consideration. Any additional support material will be distributed at the meeting.

Should you have any questions regarding the agenda, please contact the District Manager at (321) 263-0132 X 536 or hbeckett@vestapropertyservices.com. We look forward to seeing you at the meeting.

Sincerely,

Heath Beckett

Heath Beckett
District Manager

Cc: Attorney
Engineer
District Records

AVALON GROVES
COMMUNITY DEVELOPMENT DISTRICT

Meeting Date: Thursday, August 21, 2025
Time: 10:00 a.m.
Location: Serenoa Club Amenity Center
17555 Sawgrass Bay Blvd.,
Clermont, FL 34714

Click Here to Join the Meeting Online
Dial-in Number: 1-904-348-0776
Phone Conference ID: 684 257 747#
(Mute/Unmute: *6)
(Raise/Lower Hand: *5)

Agenda

The full draft agenda packet will be posted to the CDD website under ***Meeting Documents*** *when it becomes available, or it may be requested no earlier than 7 days prior to the meeting date by emailing sconley@vestapropertyservices.com*

I. Roll Call Carl Weston (1-VC) John Holden (2) Gabriel Ruperez (3) Robert Wolski (4) Gene Mastrangeli (5-C)

II. Audience Comments – Agenda Items *(Limited to 3 minutes per individual for agenda items.)*

III. Staff & Vendor Reports

A. Community Managers

1. Palms at Serenoa HOA Update – *Shannon Bernard/John Holden*
2. Serenoa POA Update – *David Landry/Gene Mastrangeli*

B. Aquatic Maintenance Report – *Steadfast Environmental* Exhibit 1

1. Review of Pond Requests through 8/18/2025

C. Landscape Maintenance Report – *Justin Sarka, Down To Earth* Exhibit 2

1. Review of Landscape Requests through 8/18/2025
2. Consideration of Down To Earth Proposals
   a. Maintenance Agreement Addendum to Add Sawgrass Bay Blvd. Roundabout Exhibit 3
   b. #114231 Sawgrass Bay Blvd Median Sod Replacement (revised) - $24,731.77 – *Previously Presented* Exhibit 4
   c. #126359 Replace Rain Sensors on 3 Controllers in Edgemont - $815.57 Walk-on Exhibit A

D. Field Manager – *Michael Bush, Vesta District Services* Exhibit 5

1. Review of Field Requests through 8/18/2025
2. Review of Streetlight Requests through 8/18/2025
3. Consideration of Swine Solutions Proposals for Renewal of Hog Trapping Services Exhibit 6
   a. 1-Year Term - $22,200-yr + $385 per trap
   b. 3-Year Term - $19,800-yr + $385 per trap

III. Staff & Vendor Reports (Continued)

E. District Engineer – *Greg Woodcock, Stantec*

1. Update on Edgemont Punch List Fulfillment
2. Update on SWFWMD Permit for Depositing Reclaimed Water in CDD Ponds
3. Update on Village 3 Landscape Maintenance Requirements

F. District Counsel – *Bennett Davenport, Kutak Rock*

1. Update on Sawgrass Bay Blvd Roundabout Punch List

G. District Manager – *Heath Beckett, Vesta District Services*

1. Consideration of Reserve Study Proposals — Exhibit 7
   a. Custom Reserves LLC - $4,700.00
   b. Florida Reserve Study & Appraisal - $4,900.00
   c. Reserve Study Institute - $6,750.00
2. Adoption of **Resolution 2025-13, Setting FY 2026 Meeting Schedule** — Exhibit 8

IV. Consent Agenda

A. Consideration and Acceptance of the Minutes of the Board of Supervisors Workshop Held July 10, 2025 — Exhibit 9

B. Consideration and Approval of the Minutes of the Board of Supervisors Regular Meeting Held July 24, 2025 — Exhibit 10

C. Consideration and Acceptance of the Unaudited July 2025 Financial Statements — Exhibit 11

V. Liaison Reports

A. Landscape and Environmental – *Gabriel Ruperez/Carl Weston*

1. Landscape Scoresheets — Exhibit 12
2. Discussion on Mulch Placement Along Fence Lines on CDD Property *(Weston)*

B. Amenities and Infrastructure – *John Holden/Gene Mastrangeli*

1. Discussion on Homeowner Fence Installations on Easements & ACC Application Oversight *(Mastrangeli)*

C. Public Safety – *Carl Weston/Robert Wolski*

1. Discussion on Sidewalk Maintenance Responsibilities along Sawgrass Bay Blvd *(Wolski)*

D. Finance – *Gene Mastrangeli/Robert Wolski*

VI. Supervisor Requests

A. Next Workshop Agenda Items

B. Next Meeting Agenda Items

VII. Audience Comments – New Business *(Limited to 3 minutes per individual for non-agenda items)*

VIII. Next Workshop Attendance Check

September 11, 2025 at 10 a.m.
Palms at Serenoa Clubhouse
17244 Bay Cedar Way,
Clermont, FL 34714

	In Person	*Virtually*	*Not*
Carl Weston (1-VC)			
John Holden (2)			
Gabriel Ruperez (3)			
Robert Wolski (4)			
Gene Mastrangeli (5-C)			

IX. Next Meeting Quorum Check

September 25, 2025 at 10 a.m.
Serenoa Club Amenity Center
17555 Sawgrass Bay Blvd.,
Clermont, FL 34714

	In Person	*Virtually*	*Not*
Carl Weston (1-VC)			
John Holden (2)			
Gabriel Ruperez (3)			
Robert Wolski (4)			
Gene Mastrangeli (5-C)			

X. Action Item Summary *(For Inclusion in Minutes)*

Exhibit 13

XI. Adjournment

EXHIBIT 1

Avalon Groves CDD Aquatics

Inspection Date:

8/14/2025 12:00 PM

Prepared by:

Matt Goldrick

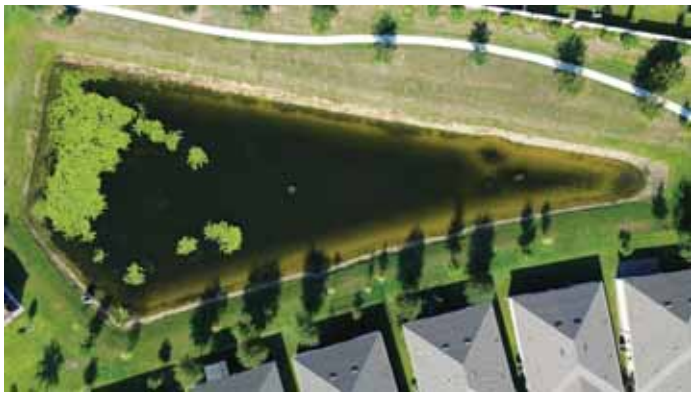
Account Manager

STEADFAST OFFICE:
WWW.STEADFASTENV.COM
813-836-7940

Inspection Report

SITE: 2

Condition: Excellent Great ✓Good Poor Mixed Condition Improving



Comments:

Mild submerged algae near the edge of the pond. The water in this section is shallow and much warmer, which feeds algal growth. Technicians will apply algaecide treatments during the next event.
No nuisance grass growth aside from lilies.

WATER: ✕ Clear Turbid Tannic
ALGAE: N/A ✕ Subsurface Filamentous Surface Filamentous Planktonic Cyanobacteria
GRASSES: ✕ N/A Minimal Moderate Substantial
NUISANCE SPECIES OBSERVED:
Torpedo Grass Pennywort Babytears Chara
Hydrilla Slender Spikerush Other: Water lilies

SITE: 3

Condition: Excellent ✓Great Good Poor Mixed Condition Improving

Comments:

Mild patches of filamentous algae present on the perimeter. A quick treatment by a technician will begin to clear these areas.
No nuisance grass growth observed.

WATER: ✕ Clear Turbid Tannic
ALGAE: N/A ✕ Subsurface Filamentous ✕ Surface Filamentous Planktonic Cyanobacteria
GRASSES: ✕ N/A Minimal Moderate Substantial
NUISANCE SPECIES OBSERVED:
Torpedo Grass Pennywort Babytears Chara
Hydrilla Slender Spikerush Other:

Inspection Report

SITE: 4

Condition: Excellent Great Good ✓Poor Mixed Condition Improving

Comments:

Filamentous algae, dense lily growth, and submerged vegetation are all present. Technicians have been regularly applying treatments for all of these during service visits. We are testing a new mix for growth like this and if its good results continue, a technician will employ it here.

WATER: ✕ Clear Turbid Tannic
ALGAE: N/A ✕ Subsurface Filamentous ✕ Surface Filamentous Planktonic Cyanobacteria
GRASSES: N/A ✕ Minimal Moderate Substantial
NUISANCE SPECIES OBSERVED:
Torpedo Grass Pennywort Babytears Chara
✕ Hydrilla Slender Spikerush Other: Water lilies

SITE: 5

Condition: ✓Excellent Great Good Poor Mixed Condition Improving

Comments:

No algae or nuisance grass growth observed. Routine monitoring and treatments as needed will continue.
It appears the two larger sections of this pond have recently re-joined together due to increased rain.

WATER: ✕ Clear Turbid Tannic
ALGAE: ✕ N/A Subsurface Filamentous Surface Filamentous Planktonic Cyanobacteria
GRASSES: ✕ N/A Minimal Moderate Substantial
NUISANCE SPECIES OBSERVED:
Torpedo Grass Pennywort Babytears Chara
Hydrilla Slender Spikerush Other:

Inspection Report

SITE: 6

Condition: Excellent Great ✓Good Poor Mixed Condition Improving

Comments:

Sections of submerged vegetation and filamentous algae are present. Ongoing treatments for both have been occurring. The new mix can be used here as well.

WATER: ✕ Clear Turbid Tannic

ALGAE: N/A Subsurface Filamentous ✕ Surface Filamentous Planktonic Cyanobacteria

GRASSES: N/A ✕ Minimal Moderate Substantial

NUISANCE SPECIES OBSERVED:

Torpedo Grass Pennywort Babytears Chara

Hydrilla ✕ Slender Spikerush Other:

SITE: 7

Condition: Excellent ✓Great Good Poor Mixed Condition Improving

Comments:

Submerged filamentous algae is present. It appears to be contained to a deeper, colder section of the pond. Some species of algae behave this way and will likely not creep toward the shore or surface. Technicians have access to algaecides that will combat this type of growth.
No nuisance grass growth observed.

WATER: ✕ Clear Turbid Tannic

ALGAE: N/A ✕ Subsurface Filamentous Surface Filamentous Planktonic Cyanobacteria

GRASSES: ✕ N/A Minimal Moderate Substantial

NUISANCE SPECIES OBSERVED:

Torpedo Grass Pennywort Babytears Chara

Hydrilla Slender Spikerush Other:

Inspection Report

SITE: 8

Condition: Excellent Great ✓Good Poor Mixed Condition Improving

Comments:

One small section of planktonic algae. This will be addressed next visit to prevent further growth.
No nuisance grass growth observed besides lilies.

WATER: ✕ Clear Turbid Tannic
ALGAE: N/A Subsurface Filamentous Surface Filamentous
✕ Planktonic Cyanobacteria
GRASSES: ✕ N/A Minimal Moderate Substantial
NUISANCE SPECIES OBSERVED:
Torpedo Grass Pennywort Babytears Chara
Hydrilla Slender Spikerush Other: Water lilies

SITE: 9

Condition: Excellent Great Good Poor ✓Mixed Condition Improving

Comments:

The only nuisance growth present is a planktonic algae bloom. A nearby pond is set for treatment for the same issue, so this one will be included as well.

WATER: ✕ Clear Turbid Tannic
ALGAE: N/A Subsurface Filamentous Surface Filamentous
✕ Planktonic ✕ Cyanobacteria
GRASSES: ✕ N/A Minimal Moderate Substantial
NUISANCE SPECIES OBSERVED:
Torpedo Grass Pennywort Babytears Chara
Hydrilla Slender Spikerush Other:

Inspection Report

SITE: 10

Condition: Excellent Great ✓Good Poor ✓Mixed Condition Improving

Comments:

Early signs of a planktonic algae bloom present. As with other ponds listed above, this one will be treated.
Most products used for planktonic algae will also combat any submerged vegetation present.

WATER: ✕ Clear Turbid Tannic
ALGAE: N/A Subsurface Filamentous Surface Filamentous
✕ Planktonic Cyanobacteria
GRASSES: N/A ✕ Minimal Moderate Substantial
NUISANCE SPECIES OBSERVED:
Torpedo Grass Pennywort Babytears Chara
✕ Hydrilla Slender Spikerush Other:

SITE: 11

Condition: Excellent Great ✓Good Poor Mixed Condition Improving

Comments:

Algae is clinging to shoreline grasses. This will actually make it easier to treat both simultaneously and begin clearing growth. A technician will do this treatment next visit.

WATER: ✕ Clear Turbid Tannic
ALGAE: N/A ✕ Subsurface Filamentous Surface Filamentous
Planktonic Cyanobacteria
GRASSES: N/A ✕ Minimal Moderate Substantial
NUISANCE SPECIES OBSERVED:
Torpedo Grass Pennywort Babytears Chara
Hydrilla Slender Spikerush Other:

MANAGEMENT SUMMARY

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With the passing of the summer solstice, we are currently in the longest, hottest days of the year, the height of Summer. As such, algae and vegetation is growing as rapidly as possible. At this time of year, it will be a cyclical battle against these forces until more frequent rainfall or cooler temperatures bring relief with the onset of Fall. It should be noted that more frequent rainfall is likely in the coming weeks. Should this be the case, the pond's appearance will improve dramatically as algae is pelted down after treatment and fill ponds, and circulate water, resetting the pond's biology.

During today's visit, ponds were in mixed condition. Algae will continue to be the main target, as algal blooms are infrequent in the ponds. Should any occur, technicians will respond promptly. Shoreline grasses are mostly under control and only present in small sections.

Routine treatments will continue to maintain the appearance & health of the ponds as we make our way through the height of the growing season.

RECOMMENDATIONS

Continue to treat ponds for algae, administer follow-ups to ponds experiencing extended decay times.

Administer treatments to any nuisance grasses growing along exposed shorelines and within beneficial plants.

Continue to apply treatment to overgrown littoral areas.

Avoid over treating ponds, to prevent fish kills or toxic blooms.

Stay alert for debris items that find their way to the pond’s shore.

Thank you for choosing Steadfast Environmental!

MAINTENANCE AREA

STEADFAST ENVIRONMENTAL

Avalon Groves CDD

Sawgrass Bay Blvd, Clermont

Gate Code:

Ponds/Stormwater System

Entry #	Date Created	Name	Address	Message	Response	Resolution / Date
151	2025-08-17 16	Jankowski	17720 Passionflower Cir	Large accumulation of lily pads along the shore		
148	2025-08-03 20	Anderson	3448 Yellowtop Loop	Algae - Pond 17		
136	2025-07-08 1	Mesonero	3476 Twin Flower Ct	Request for cleanup of the Pond behind my home. Based on the following report I recieved from Vesta District, our Pond was not cleaned for debris. Thank you for your cooperation. Daily Logs List Printed: Jul 3, 2025 30435 Commerce Drive Unit 102, San Antonio, FL 33576 Phone: 844-347-0702 Fax: 813-501-1432 Job: SE1032 Avalon Groves CDD Title: Added By: Matt Goldrick Log Notes: Treated the following ponds for grasses, submerged vegetation, and algae: 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 15, 16, 17, 18, 19, 58, 59, 60 Picked up trash as needed No downed trees noticed on pond 13 Weather Conditions: Partly cloudy with showers and scattered storms Wed, Jul 2, 2025, 12:00 AM 82°F 73°F Wind: 5 mph		

Entry #	Date Created	Name	Address	Message	Response	Resolution / Date
132	2025-07-02 19	Anderson	3448 Yellowtop Loop	I had sent a message a few hours ago and realized I didn't upload the correct picture of the Algae that is all over our pond. I have not seen anyone out here in weeks, it is getting worse everyday. Also there is a large plastic u-shaped thing that the builders let behind that needs to be removed. I pay a lot for CDD taxes not really sure why I am not receiving the services. Please email me should you have any questions.	7/3 Vendor response - Every pond mentioned in the past few requests (13, 17, 18, 15) were all treated. The technician didn't mention any dead trees on pond 13. 7/2 Weston response - Good evening Patricia, As your Supervisor for Avalon Groves CDD, I am in receipt of your MachForm application. Thank you for bringing this to our attention and for your vigilance in maintaining the community. Your input is valuable to us. I appreciate the concern you provided about Pond 17. We recently became aware of this issue, and remediation will be conducted to address it effectively. In regards to the large plastic u-shape (concrete) you described, it is actually an inlet for storm drainage, which collects rainwater from the street. Because of the low water level, the inlet can be seen. If you have any more concerns, please feel free to reach out.	
129	2025-06-25 17	Weston	17686 Blazing Star Cir	See pics. I am already inspecting several ponds for trash which I have found.. I noticed that this pond the algae has been increasing in size.	7/3 Vendor response - Every pond mentioned in the past few requests (13, 17, 18, 15) were all treated. The technician didn't mention any dead trees on pond 13.	

Daily Logs List

Printed: Aug 7, 2025
30435 Commerce Drive Unit 102, San Antonio, FL 33576
Phone: 844-347-0702
Fax: 813-501-1432

Aug 6, 2025

Job: SE1032 Avalon Groves CDD
Title:
Added By: David Smeltz
Log Notes:
Treated ponds for:(Grasses&Algae)
1,2,3,4,5,6,7,8,58,13,18,12,11,17,15,16,9,10,14
Weather Conditions:
Partly cloudy with isolated storms

Wed, Aug 6, 2025, 1:06 PM

93°F
75°F

Wind: 6 mph
Humidity: 90%
Total Precip: 0.15"

Attachments: 8

EXHIBIT 2

Avalon Groves August Report

- 7/21 Mow, string trimmed, hard edged all areas. Began cut back to all sidewalk and curblines along Sawgrass blvd beginning at Village 3. Daily litter patrol along Sawgrass Blvd to include advertising signage removal. Irrigation proposal #124316 completed 7/31 replacing the decoders in median near Sanctuary Dr.

- 7/28 Mow, string trimmed, hard edged all areas. Continued cut back to all sidewalk and curblines along Sawgrass blvd beginning at Village 3. Daily litter patrol along Sawgrass Blvd to include advertising signage removal. Alligator sod repair complete with cut backs done caused by pool installation.

- 8/4 Mow, string trimmed, hard edged all areas. Completed back to all sidewalk and curblines along Sawgrass blvd beginning at Village 3. Daily litter patrol along Sawgrass Blvd to include advertising signage removal.

- 8/11 Mow, string trimmed, hard edged all areas. Began cut back to all sidewalk and curblines along Sawgrass blvd beginning at Village 3. Daily litter patrol along Sawgrass Blvd to include advertising signage removal. Mulch install completed Tuesday 8/12 this is phase 1 of the project we were able to cover the areas below. Irrigation proposal # 124298 completed adding zones to the corners of Sanctuary Dr. With this project being completed all irrigation is currently operational along

Sawgrass Bay Blvd up to Village 3. Tree trimmed along Edgemont and Palms completed.

Trees were removed along the Edgemont bed line and rock installed on to CDD beds.

DOWN TO EARTH
LANDSCAPE & IRRIGATION
A Safeguard Services Company

Job Name: Avalon Grove
Report Type: Monthly Inspection
Controller Name: #1
Date: 7/28/25 **Page #:** 1 of 2

	Start Times:	Seasonal Adjust:	Run Days:
Program A	12:00 am	%	M (T) W T (F) S (S)
Program B		%	M T W T F S S
Program C		%	M T W T F S S
Program D		%	M T W T F S S

Checked Weather Sensor:	
YES	NO
Weather Sensor:	
Working	Not Working

Controller Make & Model:	Hunter ACC2			
Controller Status:	(WORKING)		NOT WORKING	
POC info:	Potable Water	Reclaim Water	Well Water	(Lake Water)
Pump Status & Type:	(PRESSURIZED)	PUMP START	CENTRIFUGAL	SUBMERSIBLE

Information:

Zone Number	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
Spray, Rotor, MP, Drip, or Bubbler	MP	D	MP	B	MP	MP	MP	B	MP	D	MP	MP	MP	D	MP	MP
Run Time [Program: A]	~~20~~	~~10~~				20	30	10	30	10	30	10	30	10	30	30
Run Time [Program:]																
Battery Pack/Doubler/Add-a-Zone																
Zone Faults or Alarms																

Contract/Maintenance [No Charge]:

Checked Filters/Cleaned																
Maintenance Repairs																
Clogged Nozzles																
Head Straightened/Adjusted																

Billable Repairs or Upgrades:

Head Broken - 6" spray																
Head Broken - 12" spray						1										
Head Broken - 6" rotor																
Head Broken - 12" rotor																
Broken Riser																
Upgrade 4" to 6" Pop Up																
Upgrade 6" to 12" Pop Up																
Nozzle - MPR																
Nozzle - MP rotator						1										
Severe Line Clog																
Lateral Line Break																
Relocation																
Head Raised or Lowered-Turf																
Head Raised or Lowered-Shrub																
Damaged Valve Box																
Valve - Inoperative/Sticking																
Additional Labor/Troubleshoot																
Other-See Comments																

Additional Comments:

Technician Name: Logan Adams **Signature**

Did you contact the Account Manager? YES / NO What time?_____ Did you leave a VOICEMAIL / TEXT / EMAIL? YES / NO

DOWN TO EARTH
LANDSCAPE & IRRIGATION
A Safeguard Services Company

Job Name: Avalon Grove
Report Type: Monthly Inspection
Controller Name: #1
Date: 7/28/25 **Page #:** 2 **of** 2

	Start Times:	Seasonal Adjust:	Run Days:
Program A		%	M T W T F S S
Program B		%	M T W T F S S
Program C		%	M T W T F S S
Program D		%	M T W T F S S

Checked Weather Sensor:	
YES	NO
Weather Sensor:	
Working	Not Working

Controller Make & Model:				
Controller Status:	WORKING		NOT WORKING	
POC info:	Potable Water	Reclaim Water	Well Water	Lake Water
Pump Status & Type:	PRESSURIZED	PUMP START	CENTRIFUGAL	SUBMERSIBLE

Information:

Zone Number	17	18	19													
Spray, Rotor, MP, Drip, or Bubbler	MP	MP	B													
Run Time **[Program:** A **]**	30	30	10													
Run Time **[Program:]**																
Battery Pack/Doubler/Add-a-Zone																
Zone Faults or Alarms																

Contract/Maintenance [No Charge]:

Checked Filters/Cleaned																
Maintenance Repairs																
Clogged Nozzles																
Head Straightened/Adjusted																

Billable Repairs or Upgrades:

Head Broken - 6" spray		1														
Head Broken - 12" spray																
Head Broken - 6" rotor																
Head Broken - 12" rotor																
Broken Riser																
Upgrade 4" to 6" Pop Up																
Upgrade 6" to 12" Pop Up																
Nozzle - MPR																
Nozzle - MP rotator		1														
Severe Line Clog																
Lateral Line Break																
Relocation																
Head Raised or Lowered-Turf																
Head Raised or Lowered-Shrub																
Damaged Valve Box																
Valve - Inoperative/Sticking																
Additional Labor/Troubleshoot																
Other-See Comments																

Additional Comments:

Technician Name: **Signature**

Did you contact the Account Manager? YES / NO What time?_____ Did you leave a VOICEMAIL / TEXT / EMAIL? YES / NO

DOWN TO EARTH
LANDSCAPE & IRRIGATION
A Safeguard Services Company

Job Name: Avalon Grove
Report Type: Monthly Inspection
Controller Name: #2
Date: 7/28/25 **Page #:** 1 of 5

	Start Times:	Seasonal Adjust:	Run Days:
Program A	4:00 pm	%	M (T) W T (F) S (S)
Program B	4:00 pm	%	(M) T W (T) F (S) S
Program C		%	M T W T F S S
Program D		%	M T W T F S S

Checked Weather Sensor:	
YES	NO
Weather Sensor:	
Working	Not Working

Controller Make & Model:	Hunter ACC2			
Controller Status:	(WORKING)		NOT WORKING	
POC info:	Potable Water	Reclaim Water	(Well Water)	Lake Water
Pump Status & Type:	(PRESSURIZED)	PUMP START	CENTRIFUGAL	SUBMERSIBLE

Information:

Zone Number	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
Spray, Rotor, MP, Drip, or Bubbler	—	R	MP	MP	MP	MP	R	R	R	R	R	MP	MP	MP	MP	—
Run Time [Program: A]		20	20	20	30	30	30	30	30	30	30	30	20	20	20	
Run Time [Program:]																
Battery Pack/Doubler/Add-a-Zone																
Zone Faults or Alarms																

Contract/Maintenance [No Charge]:

Checked Filters/Cleaned																
Maintenance Repairs																
Clogged Nozzles																
Head Straightened/Adjusted																

Billable Repairs or Upgrades:

Head Broken - 6" spray																
Head Broken - 12" spray																
Head Broken - 6" rotor																
Head Broken - 12" rotor																
Broken Riser																
Upgrade 4" to 6" Pop Up																
Upgrade 6" to 12" Pop Up																
Nozzle - MPR																
Nozzle - MP rotator																
Severe Line Clog																
Lateral Line Break																
Relocation																
Head Raised or Lowered-Turf																
Head Raised or Lowered-Shrub																
Damaged Valve Box																
Valve - Inoperative/Sticking																
Additional Labor/Troubleshoot																
Other-See Comments																

Additional Comments:

Technician Name: Logan Adams **Signature**

Did you contact the Account Manager? YES / NO What time? _____ Did you leave a VOICEMAIL / TEXT / EMAIL? YES / NO

DOWN TO EARTH
LANDSCAPE & IRRIGATION
A Safeguard Services Company

Job Name: Avalon Grove
Report Type: Monthly Inspection
Controller Name: #2
Date: 7/28/25 **Page #:** 2 **of** 5

	Start Times:	Seasonal Adjust:	Run Days:
Program A		%	M T W T F S S
Program B		%	M T W T F S S
Program C		%	M T W T F S S
Program D		%	M T W T F S S

Checked Weather Sensor:	
YES	NO
Weather Sensor:	
Working	Not Working

Controller Make & Model:				
Controller Status:	WORKING		NOT WORKING	
POC info:	Potable Water	Reclaim Water	Well Water	Lake Water
Pump Status & Type:	PRESSURIZED	PUMP START	CENTRIFUGAL	SUBMERSIBLE

Information:

Zone Number	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32
Spray, Rotor, MP, Drip, or Bubbler	—	mp	D	mp	—	mp	—	—	—	—	—					
Run Time [Program: A]		30	10	30		30										
Run Time [Program:]																
Battery Pack/Doubler/Add-a-Zone																
Zone Faults or Alarms																

Contract/Maintenance [No Charge]:

Checked Filters/Cleaned																
Maintenance Repairs																
Clogged Nozzles																
Head Straightened/Adjusted																

Billable Repairs or Upgrades:

Head Broken - 6" spray																
Head Broken - 12" spray																
Head Broken - 6" rotor																
Head Broken - 12" rotor																
Broken Riser																
Upgrade 4" to 6" Pop Up																
Upgrade 6" to 12" Pop Up																
Nozzle - MPR																
Nozzle - MP rotator																
Severe Line Clog																
Lateral Line Break																
Relocation																
Head Raised or Lowered-Turf																
Head Raised or Lowered-Shrub																
Damaged Valve Box																
Valve - Inoperative/Sticking																
Additional Labor/Troubleshoot																
Other-See Comments																

Additional Comments:

Technician Name: **Signature**

Did you contact the Account Manager? YES / NO What time?_____ Did you leave a VOICEMAIL / TEXT / EMAIL? YES / NO

DOWN TO EARTH
LANDSCAPE & IRRIGATION
A Safeguard Services Company

Job Name: Avalon Grove
Report Type: Monthly Inspection
Controller Name: #2
Date: 7/28/25 **Page #:** 3 of 5

	Start Times:	Seasonal Adjust:	Run Days:
Program A		%	M T W T F S S
Program B		%	M T W T F S S
Program C		%	M T W T F S S
Program D		%	M T W T F S S

Checked Weather Sensor:	
YES	NO
Weather Sensor:	
Working	Not Working

Controller Make & Model:				
Controller Status:	WORKING		NOT WORKING	
POC info:	Potable Water	Reclaim Water	Well Water	Lake Water
Pump Status & Type:	PRESSURIZED	PUMP START	CENTRIFUGAL	SUBMERSIBLE

Information:

Zone Number	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48
Spray, Rotor, MP, Drip, or Bubbler	—	—	—	—	MP	MP	—	MP	MP	MP	MP	MP	MP	MP	MP	MP
Run Time [Program: A]					20	30		20	30	20	20	30	30	30	20	30
Run Time [Program:]																
Battery Pack/Doubler/Add-a-Zone																
Zone Faults or Alarms																

Contract/Maintenance [No Charge]:

Checked Filters/Cleaned																
Maintenance Repairs																
Clogged Nozzles																
Head Straightened/Adjusted																

Billable Repairs or Upgrades:

Head Broken - 6" spray					1					1						
Head Broken - 12" spray																
Head Broken - 6" rotor																
Head Broken - 12" rotor																
Broken Riser																
Upgrade 4" to 6" Pop Up																
Upgrade 6" to 12" Pop Up																
Nozzle - MPR																
Nozzle - MP rotator					1					1						
Severe Line Clog																
Lateral Line Break																
Relocation																
Head Raised or Lowered-Turf																
Head Raised or Lowered-Shrub																
Damaged Valve Box																
Valve - Inoperative/Sticking																
Additional Labor/Troubleshoot																
Other-See Comments																

Additional Comments:

Technician Name: **Signature**

Did you contact the Account Manager? YES / NO What time?_____ Did you leave a VOICEMAIL / TEXT / EMAIL? YES / NO

DOWN TO EARTH
LANDSCAPE & IRRIGATION
A Safeguard Services Company

Job Name: Avalon Grove
Report Type: Monthly Inspection
Controller Name: #2
Date: 7/28/25 Page #: 3 of 5

	Start Times:	Seasonal Adjust:	Run Days:
Program A		%	M T W T F S S
Program B		%	M T W T F S S
Program C		%	M T W T F S S
Program D		%	M T W T F S S

Checked Weather Sensor:	
YES	NO
Weather Sensor:	
Working	Not Working

Controller Make & Model:				
Controller Status:	WORKING		NOT WORKING	
POC info:	Potable Water	Reclaim Water	Well Water	Lake Water
Pump Status & Type:	PRESSURIZED	PUMP START	CENTRIFUGAL	SUBMERSIBLE

Information:

Zone Number	49	50	51	52	53	54	55	56	57	58	59	60	61	62	63	64
Spray, Rotor, MP, Drip, or Bubbler	—	—	MP	—	D	MP	MP	—	MP	D	R	R	R	B	D	R
Run Time [Program: B]			30		10	20	20		20	10	30	30	30	10	10	30
Run Time [Program:]																
Battery Pack/Doubler/Add-a-Zone																
Zone Faults or Alarms																

Contract/Maintenance [No Charge]:

Checked Filters/Cleaned																
Maintenance Repairs																
Clogged Nozzles																
Head Straightened/Adjusted	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/

Billable Repairs or Upgrades:

Head Broken - 6" spray																
Head Broken - 12" spray																
Head Broken - 6" rotor																
Head Broken - 12" rotor																
Broken Riser																
Upgrade 4" to 6" Pop Up																
Upgrade 6" to 12" Pop Up																
Nozzle - MPR																
Nozzle - MP rotator																
Severe Line Clog																
Lateral Line Break																
Relocation																
Head Raised or Lowered-Turf																
Head Raised or Lowered-Shrub																
Damaged Valve Box																
Valve - Inoperative/Sticking																
Additional Labor/Troubleshoot																
Other-See Comments																

Additional Comments:

Technician Name: **Signature**

Did you contact the Account Manager? YES / NO What time?_____ Did you leave a VOICEMAIL / TEXT / EMAIL? YES / NO

DOWN TO EARTH
LANDSCAPE & IRRIGATION
A Safeguard Services Company

Job Name: Avalon Grove
Report Type: Monthly Inspection
Controller Name: #2
Date: 7/28/25 **Page #:** 5 of 5

	Start Times:	Seasonal Adjust:	Run Days:
Program A		%	M T W T F S S
Program B		%	M T W T F S S
Program C		%	M T W T F S S
Program D		%	M T W T F S S

Checked Weather Sensor:	
YES	NO
Weather Sensor:	
Working	Not Working

Controller Make & Model:				
Controller Status:	WORKING		NOT WORKING	
POC info:	Potable Water	Reclaim Water	Well Water	Lake Water
Pump Status & Type:	PRESSURIZED	PUMP START	CENTRIFUGAL	SUBMERSIBLE

Information:

Zone Number	65	66	67	68	69	70	71	72	73	74	75					
Spray, Rotor, MP, Drip, or Bubbler	R	R	MP	R	R	R	MP	MP	MP	—	MP					
Run Time [Program: B]	30	30	30	30	30	30	30	20	20		30					
Run Time [Program:]																
Battery Pack/Doubler/Add-a-Zone																
Zone Faults or Alarms																

Contract/Maintenance [No Charge]:

Checked Filters/Cleaned																
Maintenance Repairs																
Clogged Nozzles																
Head Straightened/Adjusted																

Billable Repairs or Upgrades:

Head Broken - 6" spray																
Head Broken - 12" spray																
Head Broken - 6" rotor				1												
Head Broken - 12" rotor																
Broken Riser																
Upgrade 4" to 6" Pop Up																
Upgrade 6" to 12" Pop Up																
Nozzle - MPR																
Nozzle - MP rotator																
Severe Line Clog																
Lateral Line Break																
Relocation																
Head Raised or Lowered-Turf																
Head Raised or Lowered-Shrub																
Damaged Valve Box																
Valve - Inoperative/Sticking																
Additional Labor/Troubleshoot																
Other-See Comments																

Additional Comments:

Technician Name: **Signature**

Did you contact the Account Manager? YES / NO What time?_____ Did you leave a VOICEMAIL / TEXT / EMAIL? YES / NO

DOWN TO EARTH
LANDSCAPE & IRRIGATION
A Safeguard Services Company

Job Name: Avalon Grove
Report Type: Monthly Inspection
Controller Name: #3
Date: 7/15/25 **Page #:** 1 of 1

	Start Times:	Seasonal Adjust:	Run Days:
Program A	4:00 pm	%	M (T) W T (F) S (S)
Program B		%	M T W T F S S
Program C		%	M T W T F S S
Program D		%	M T W T F S S

Checked Weather Sensor:	
YES	NO
Weather Sensor:	
Working	Not Working

Controller Make & Model:	Hunter ACC2			
Controller Status:	WORKING		NOT WORKING	
POC info:	Potable Water	Reclaim Water	Well Water	Lake Water
Pump Status & Type:	PRESSURIZED	PUMP START	CENTRIFUGAL	SUBMERSIBLE

Information:

Zone Number	1	2	3	4	5	6	7	8	9	10	11	12				
Spray, Rotor, MP, Drip, or Bubbler	MP	MP	MP	—	MP	MP	MP	MP	MP	MP	B	MP				
Run Time [Program: A]	30	30			30	30	30	30	30	10	10	30				
Run Time [Program:]																
Battery Pack/Doubler/Add-a-Zone																
Zone Faults or Alarms																

Contract/Maintenance [No Charge]:

Checked Filters/Cleaned																
Maintenance Repairs																
Clogged Nozzles																
Head Straightened/Adjusted																

Billable Repairs or Upgrades:

Head Broken - 6" spray																
Head Broken - 12" spray																
Head Broken - 6" rotor																
Head Broken - 12" rotor																
Broken Riser																
Upgrade 4" to 6" Pop Up																
Upgrade 6" to 12" Pop Up																
Nozzle - MPR																
Nozzle - MP rotator																
Severe Line Clog																
Lateral Line Break																
Relocation																
Head Raised or Lowered-Turf																
Head Raised or Lowered-Shrub																
Damaged Valve Box																
Valve - Inoperative/Sticking																
Additional Labor/Troubleshoot																
Other-See Comments																

Additional Comments:

Technician Name: Logan Adams **Signature**

Did you contact the Account Manager? YES / NO What time?_____ Did you leave a VOICEMAIL / TEXT / EMAIL? YES / NO

DOWN TO EARTH
LANDSCAPE & IRRIGATION
A Safeguard Services Company

Job Name: Avalon Grove
Report Type: Monthly Inspection
Controller Name: Basswood
Date: 7/15/25 **Page #:** 1 of 1

	Start Times:	Seasonal Adjust:	Run Days:
Program A	8:00 pm	%	M (T) W T (F) S (S)
Program B		%	M T W T F S S
Program C		%	M T W T F S S
Program D		%	M T W T F S S

Checked Weather Sensor:	(YES) NO
Weather Sensor:	(Working) Not Working

Controller Make & Model:	Hunter ICC2			
Controller Status:	(WORKING)		NOT WORKING	
POC info:	Potable Water	(Reclaim Water)	Well Water	Lake Water
Pump Status & Type:	(PRESSURIZED)	PUMP START	CENTRIFUGAL	SUBMERSIBLE

Information:

Zone Number	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
Spray, Rotor, MP, Drip, or Bubbler	R	S	S	S	S	S	S	S	S	R	R	R	R	R	R	MP
Run Time [Program: A]	35	20	20	20	20	20	20	20	20	45	45	45	60	45	45	30
Run Time [Program:]																
Battery Pack/Doubler/Add-a-Zone																X
Zone Faults or Alarms																

Contract/Maintenance [No Charge]:

Checked Filters/Cleaned																
Maintenance Repairs																
Clogged Nozzles																
Head Straightened/Adjusted																

Billable Repairs or Upgrades:

Head Broken - 6" spray																
Head Broken - 12" spray																
Head Broken - 6" rotor																
Head Broken - 12" rotor																
Broken Riser																
Upgrade 4" to 6" Pop Up																
Upgrade 6" to 12" Pop Up																
Nozzle - MPR																
Nozzle - MP rotator																
Severe Line Clog																
Lateral Line Break			1							1			1			
Relocation																
Head Raised or Lowered-Turf																
Head Raised or Lowered-Shrub																
Damaged Valve Box																
Valve - Inoperative/Sticking																
Additional Labor/Troubleshoot																
Other-See Comments																

Additional Comments:

Technician Name: Logan Adams **Signature**

Did you contact the Account Manager? YES / NO What time?_____ Did you leave a VOICEMAIL / TEXT / EMAIL? YES / NO

DOWN TO EARTH
LANDSCAPE & IRRIGATION
A Safeguard Services Company

Job Name: Avalon Grove
Report Type: Monthly Inspection
Controller Name: Edgemont
Date: 7/15/25 **Page #:** 1 of 1

	Start Times:	Seasonal Adjust:	Run Days:
Program A	12:00 am	%	M (T) W T (F) S (S)
Program B		%	M T W T F S S
Program C		%	M T W T F S S
Program D		%	M T W T F S S

Checked Weather Sensor:	
YES	NO
Weather Sensor:	
Working	Not Working

Controller Make & Model:	Hunter Hybrid			
Controller Status:	(WORKING)		NOT WORKING	
POC info:	(Potable Water)	Reclaim Water	Well Water	Lake Water
Pump Status & Type:	(PRESSURIZED)	PUMP START	CENTRIFUGAL	SUBMERSIBLE

Information:

Zone Number	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
Spray, Rotor, MP, Drip, or Bubbler	D	D	S	B	S	B	B/D	D	B	B	D	B	D	B	D	B	D
Run Time [Program: A]	30	30	30	30	30	30											
Run Time [Program:]							45	45	45	45	45	45	45	45	45	45	45
Battery Pack/Doubler/Add-a-Zone							X	X	X	X	X	X	X	X	X	X	X
Zone Faults or Alarms																	

Contract/Maintenance [No Charge]:

Checked Filters/Cleaned																
Maintenance Repairs																
Clogged Nozzles																
Head Straightened/Adjusted																

Billable Repairs or Upgrades:

Head Broken - 6" spray																
Head Broken - 12" spray																
Head Broken - 6" rotor																
Head Broken - 12" rotor																
Broken Riser																
Upgrade 4" to 6" Pop Up																
Upgrade 6" to 12" Pop Up																
Nozzle - MPR																
Nozzle - MP rotator																
Severe Line Clog																
Lateral Line Break																
Relocation																
Head Raised or Lowered-Turf																
Head Raised or Lowered-Shrub																
Damaged Valve Box																
Valve - Inoperative/Sticking																
Additional Labor/Troubleshoot																
Other-See Comments																

Additional Comments:

Technician Name: Logan [illegible] **Signature** [illegible]

Did you contact the Account Manager? YES / NO What time? _____ Did you leave a VOICEMAIL / TEXT / EMAIL? YES / NO

DOWN TO EARTH
LANDSCAPE & IRRIGATION
A Safeguard Services Company

Job Name: Avalon Green
Report Type: Monthly Inspection
Controller Name: Village #3
Date: 7/15/25 **Page #:** 1 of 1

	Start Times:	Seasonal Adjust:	Run Days:
Program A	10:00 pm	%	M (T) W T (F) S (S)
Program B		%	M T W T F S S
Program C		%	M T W T F S S
Program D		%	M T W T F S S

Checked Weather Sensor:	
YES	NO
Weather Sensor:	
Working	Not Working

Controller Make & Model:	Hunter ICC2			
Controller Status:	(WORKING)		NOT WORKING	
POC info:	Potable Water	Reclaim Water	(Well Water)	Lake Water
Pump Status & Type:	(PRESSURIZED)	PUMP START	CENTRIFUGAL	SUBMERSIBLE

Information:

Zone Number	1	2	3	4	5	6	7	8	9	10						
Spray, Rotor, MP, Drip, or Bubbler	MP	MP	B	MP	MP	MP	B	MP	MP	MP						
Run Time [Program: A]	30	30	30	30	30	30	30	30	30	30						
Run Time [Program:]																
Battery Pack/Doubler/Add-a-Zone																
Zone Faults or Alarms																

Contract/Maintenance [No Charge]:

Checked Filters/Cleaned																
Maintenance Repairs																
Clogged Nozzles																
Head Straightened/Adjusted																

Billable Repairs or Upgrades:

Head Broken - 6" spray																
Head Broken - 12" spray										1						
Head Broken - 6" rotor																
Head Broken - 12" rotor																
Broken Riser																
Upgrade 4" to 6" Pop Up																
Upgrade 6" to 12" Pop Up																
Nozzle - MPR																
Nozzle - MP rotator										1						
Severe Line Clog																
Lateral Line Break																
Relocation																
Head Raised or Lowered-Turf																
Head Raised or Lowered-Shrub																
Damaged Valve Box																
Valve - Inoperative/Sticking																
Additional Labor/Troubleshoot																
Other-See Comments																

Additional Comments:

Technician Name: Logan Adams **Signature**

Did you contact the Account Manager? YES / NO What time?_____ Did you leave a VOICEMAIL / TEXT / EMAIL? YES / NO

Landscape

Entry #	Date Created	Name	Address	Message	Response	Resolution / Date
154	2025-08-18	Lee	17585 Summersweet Way	After 0.8 inch rain at 1PM yesterday Sunday 8/17/28. The at around 7:30 PM lots of different zones up and down sawgrass bay were running with no new sod or landscaping on the zone. Please verify rain sensors and programming is correct		
150	2025-08-16	Rubino	2528 alligator flag ct	CDD continued FAILURE to properly maintain CDD lawn/weeds that are encroaching into my property. This is at least the 4th complaint in the last year. This needs to be PERMANENTLY resolved, not a clean up each time I submit a complaint.	Non-irrigatied bahia grass cannot be treated for weeds	16-Aug
149	2025-08-04	Pavia-Taylor	17399 Saw Palmetto Ave.	please send a message to the maintenance company for our CDD who mow around our ponds behind the properties? They do a great job mowing around the pond, but they stop about a foot short of the property line/fence and do not return to edge or weed whack up to our fence. The weeds and grasses growing on their side of the property line are creeping through the fence. We would appreciate it If they could them to take the time to weed whack them so we do not have to ask our gardener, at an added expense to us, to do this. If you need more information, please feel free to contact me. (949)350-5328 Thank you so much,	Fence lines are Residents responsibility	4-Aug
146	2025-07-28	Weston	17246 Bay Cedar Way, Clermont FL 34714	Huge oak tree (CDD side) that has several Low hanging branches that need trimming.	Tree lifted on 7/14	14-Jul
145	2025-07-25	Calderon	2516 Alligator Flag Ct	I have owned this house at 2516 Alligator Flag for about a year. Before I bought this house, I was told the CDD section of my rear yard would be cleaned up and sodded. I purposly paid extra for a paramatic view in my eclosure to enjoy the veiw. As of today, July 25th one year later, the rear CDD area is a big mess not cleaned, no sod. Due to personal reasons, I have not been able to attend the meetings, but I have spoken to neighbors. I would like to hear directly from the CDD. Has a completion date for this project been established? What are the exact plans and timeline for the cleanup of the area between lots 36 and 41? Thank you in advance for your assistance in this matter. Eagerly awaiting a response.		Sod installed
143	2025-07-21	LANDRY	17555 SAWGRASS BAY BLVD	Can we get the branches trimmed away from the walkway gate in village 3. Also can the bees be sprayed for those bushes	Wasps were sprayed when trimming completed, Honey bees are a protected species	

Entry #	Date Created	Name	Address	Message	Response	Resolution / Date
142	2025-07-17 13:05:34	Burtis	2524 Alligator Flag Ct	Another day on Alligator Flag Ct. 1. Another piece of equipment (mower this time) stuck in the CDD area behind our houses. 2. Another vehicle drove down our side yard (the gentleman did ask permission) in order to rescue said piece of equipment. This CDD area behind the houses on the east side of Alligator Flag Ct. is supposed to be Bahia turf that is regularly maintained. In 21 months a mower has never been able to pass through the area behind our house (2524) due to the overgrown brush and now the damage caused by the bush hog in November 2024. As I was finishing this note, Mr. Holden happened to stop by and saw what had been done today.		28-Jul
140	2025-07-15 10:29:49	Corona	17555 Sawgrass Bay Blvd	The first photo shows the bushes preventing the gate at Village 3 from closing properly when you exit to close it. You have to stand there to ensure it closes. (This is on the left side as you enter the complex.) The second photo shows a fallen sign on the grass. Landscaper was trimming there today. We're not sure if the landscaper would report the issue. It could be the pedestrian sign.	Native Fire bush has been trimmed	31-Jul
139	2025-07-14 12:01:37	Romero	3550 lovegrass way	Pond at lovegrass way, dead tree at pond edge. Been there for over a month, landscapers keep going around it but never remove it. Can you have someone remove it please. I believe it is pond #13		20-Aug
137	2025-07-08 17:11:50	Borges	2400 Palm Park Loop	Grass around pond 56 has not been maintain .	Mowing team encounter unexpected service delays	15-Jul
135	2025-07-08 12:58:12	LANDRY	17555 SAWGRASS BAY BLVD	Around the pond located behind 2400 Palm Park Loop	CDD not responsible for string trimming along private residents fences	N/A
134	2025-07-07 16:35:59	Rubino	2528 Alligator Flag Ct	Since the area behind my home was "bush hogged" a few months ago, the landscape company has FAILED to upkeep the area. Residents are back in the same position of having to clear the weeds along the same track of land. THIS IS NOT ACCEPTABLE AND NEEDS TO ADDRESSED PERMANENTLY. This is the fourth time in 13 months that I have had to escalate the problem!		Resolved 7/28
127	2025-06-21 03:19:00	Romero	3550 lovegrass way	Dead tree at pond edge can it be removed?	Yes Will be removed 8/20	20-Aug
124	2025-06-16 :	Weston	Bay Cedar Way	Trees are in downward position and is prohibitive for HOA to mow the lawn.	**This is POA Area and POA Landscaper's Responsibility**	
121	2025-06-11 (	Yeager	2520 alligator flag ct	Please clear and maintain the CDD area behind my house. It is completely grown over and needs to be cleared and sodded. (2520 alligator flag ct). It is not just the area behind my house but the entire street backing on to the conservation area. It seems it has never been maintained and its condition is unacceptable		Resolved 7/28

Entry #	Date Created	Name	Address	Message	Response	Resolution / Date
117	2025-06-07	Burtis	2524 Alligator Flag Ct	What is the ETA for the work to be done behind 2524 Alligator Flag Ct? Please see previous requests from November 2024 and February 2025.		Completed 7/28
106	2025-05-06	Mirjah	17400 Painted Leaf Way	Hope this email finds you well. Do you happen to know who I should reach out to regarding sprinklers that were removed? The community placed temporary mail boxes near our property and the sprinklers were removed. The sprinklers were never placed back. They did one side of the pathway, but not our side. I live at 17400 Painted Leaf Way, Clermont FL 34714. This happen while the community was still being build, can't remember the exact year. Concrete was removed and grass placed with no sprinklers. Thank you		
98	2025-04-30	Cosme-Perez	17310 Saw Palmetto Ave	Good Afternoon, I hope this message finds you well. I am reaching out with ongoing concerns about the condition of the entrance to Serenoa Lakes. The landscaping has been in poor shape for quite some time, with dead and disheveled areas that detract from the overall appearance of the community. While I did notice some new plants were added beneath the entrance sign a few month ago, they haven't significantly improved the aesthetics. Additionally, although the blue tarp was recently removed after being in place for nearly a year, the area has been left as bare dirt with no sod replacement. The Serenoa Lakes sign and monument are also in need of attention, showing visible rust and mildew at the base and the wooden planks are coming out with visible nails. Overall, the entrance appears neglected, especially in comparison to other neighborhoods in Serenoa, and it gives an unfavorable first impression. Furthermore, the grass across from our entrance is mostly brown until closer to the clubhouse, where it becomes greener. Maybe this is an irrigation issue that needs to be addressed. These problems have persisted for over a year, and I sincerely hope we can work together to resolve them promptly. Thank you for your time and attention.	Workshop discussion item	Area was bloc
92	2025-04-23	Bernard	17244 Bay Cedar Way	Trees around pond 2 growing suckers on the trunks		
90	2025-04-19	Sciba	17375 Saw Palmetto Ave	Between pond 57 and pond 64 behind 17375 Saw Palmetto Ave there is a softshell turtle nesting site since 10am 4/19/25. I have informed Gabriel Ruperez of the situation via message on this website. I want to make sure this site (marked on attached maintenance map) does not get disturbed by mowing, herbicide/pesticides, etc. before the board decides how to proceed. I am the homeowner at this location: Matt Sciba 3609322983		

EXHIBIT 3

AMENDMENT #2
TO THE
LANDSCAPE MAINTENANCE AGREEMENT

THIS AMENDMENT #2 TO THE LANDSCAPE MAINTENANCE AGREEMENT ("Amendment") is made and entered into this [____] day of _____, by and between Avalon Groves CDD ("**Customer**") and SSS Down to Earth Opco LLC dba Down to Earth ("**Contractor**").

WITNESSETH:

WHEREAS, **Customer** and **Contractor** entered into a Landscape Maintenance Agreement dated October 1, 2023 ("Agreement"), pursuant to which **Contractor** agreed to provide **Customer** with certain Services; and

WHEREAS, **Customer** and **Contractor** desire to modify the Agreement pursuant to this Amendment.

NOW THEREFORE, in consideration of the foregoing and the mutual covenants contained herein, and for other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, **Customer** and **Contractor** agree as follows:

1. The Agreement, as amended, including all Exhibits thereto, shall remain in full force and effect, except as modified by this Amendment.

2. Commencing on _____, Contractor shall begin performing lawncare services for the round about area. The annual contract price shall be increased accordingly by $10,072.06 ($839.34/month).

3. **Customer** and **Contractor** agree to abide by the provision of services, as set forth above. Capitalized terms used but not defined herein will have the meanings given to them in the Agreement.

IN WITNESS WHEREOF, THE PARTIES HAVE CAUSED THIS Amendment to be executed as of the date first set forth above.

Avalon Grove CDD	**SSS Down to Earth Opco, LC**
By: _____	By: _____
Name: _____	Name: _____
Title: _____	Title: _____
Date: _____	Date: _____

Avalon Grove CDD Added Areas 7/16/2025
Sawgrass Bay Boulevard, Clermont, FL, USA

- Lawn
- Bahia-Standard
- Mulch Bed

- Hard Edge

EXHIBIT 4

Down to Earth
PO Box 72701
Cleveland, Ohio 44192-0002
(321) 263-2700

Estimate: #114231

Customer Address
Vesta Property Services
Mark C. Isley
250 International Pkwy, Ste 208
Lake Mary, Florida 32746
misley@vestapropertyservices.com

Billing Address
Kyle Darin
Vesta Property Services
13810 Sutton Park Drive North
Jacksonville, FL 32224

Physical Job Address
Avalon Groves CDD
17555 Sawgrass Bay Blvd.
Clermont, FL 34714

Job	Estimated Job Start Date	Proposed By	Due Date
Recovery Post Irrigation Mainline Repair	May 19, 2025	Justin Sarka	

Estimate Details

Description of Services & Materials	Unit	Quantity	Rate	Amount
Tree/Plant Installation				
Site Prep				$65.00
Disposal Fee	Each	1	$350.00	$350.00
Red Maple	2" Caliper	4	$473.43	$1,893.72
Paspalum Quadrifarium "Crown Grass"	1 Gallon	40	$10.17	$406.80
St. Augustine "Floratam"	Square Foot	12000	$1.80	$21,600.00
Muhly Grass "Pink"	1 Gallon	45	$9.25	$416.25
			Subtotal	**$24,731.77**
			Estimated Tax	$0.00
			Job Total	**$24,731.77**

Estimates require a 50% deposit to order and schedule any approved work. The remaining invoice balance is due upon receipt. Pricing on this proposal is good for 30 days from the date created. Actual irrigation repairs will be billed at our standard labor rate plus materials. Any loss or damage from theft, tampering, vandalism, drainage, soil conditions, salt, frost, wildlife, pests, disease, lack of proper maintenance, or acts of God are excluded from this warranty. Additionally, anything underground that cannot be marked by "No Cuts", if damaged, is not covered in the above proposal. Unless specifically quoted, this job only includes an irrigation check. If irrigation services are required, an additional bid will be submitted. If the additional bid is not accepted, DTE is not responsible for loss of materials installed. This proposal is subject to our Terms & Conditions at https://dtelandscape.com/terms-and-conditions/.

Scope of Work;

- Replace sod lost due to mainline delayed repair.
- Replace Trees that died due to lack of irrigation.
- Fill in missing ornamental grasses.

Proposed By:

Justin Sarka
Down to Earth

04/23/2025
Date

Agreed & Accepted By:

Vesta Property Services

Date

Estimates require a 50% deposit to order and schedule any approved work. The remaining invoice balance is due upon receipt. Pricing on this proposal is good for 30 days from the date created. Actual irrigation repairs will be billed at our standard labor rate plus materials. Any loss or damage from theft, tampering, vandalism, drainage, soil conditions, salt, frost, wildlife, pests, disease, lack of proper maintenance, or acts of God are excluded from this warranty. Additionally, anything underground that cannot be marked by "No Cuts", if damaged, is not covered in the above proposal. Unless specifically quoted, this job only includes an irrigation check. If irrigation services are required, an additional bid will be submitted. If the additional bid is not accepted, DTE is not responsible for loss of materials installed. This proposal is subject to our Terms & Conditions at https://dtelandscape.com/terms-and-conditions/.

WALK-ON
EXHIBIT A

Down to Earth
PO Box 72701
Cleveland, Ohio 44192-0002
(321) 263-2700

Estimate: #126359

Customer Address	Billing Address	Physical Job Address
Shirley Conley , sconley@vestapropertyservices.com	Kyle Darin Vesta Property Services 13810 Sutton Park Drive North Jacksonville, FL 32224	Avalon Groves CDD 17555 Sawgrass Bay Blvd. Clermont, FL 34714

Job	Estimated Job Start Date	Proposed By	Due Date
Rain Sensor replacement	September 1, 2025	Bismark Quiles	

Estimate Details

Description of Services & Materials	Unit	Quantity	Rate	Amount
Irrigation Installation				
Irrigation Labor				$255.00
WIRELESS RAIN SENSOR.	Each	3	$162.47	$487.41
Mini Click Rain Sensor	Each	1	$73.16	$73.16
			Subtotal	**$815.57**
			Estimated Tax	$0.00
			Job Total	**$815.57**

This opportunity is to replace rain sensor on controller 1, 2, 3 and Edgemont.

Rain sensors help by automatically shutting off an irrigation system when they detect rainfall. This prevents overwatering, save water, and protects plants from stress caused by too much moisture.

Here are the main benefits rain sensor provide.

Water conservation- They prevent sprinklers from running during or after rainfall

Lower water bill - less unnecessary irrigation means reduced costs.

Healthier plants and turf - avoids root rot, fungus, and stress from excess water

Enviromental protection - minimizes runoff, which helps prevent fertilizer and pesticide washout.

Proposed By:

Bismark Quiles
Down to Earth

08/20/2025
Date

Agreed & Accepted By:

Avalon Groves CDD

Date

Estimates require a 50% deposit to order and schedule any approved work. The remaining invoice balance is due upon receipt. Pricing on this proposal is good for 30 days from the date created. Actual irrigation repairs will be billed at our standard labor rate plus materials. Any loss or damage from theft, tampering, vandalism, drainage, soil conditions, salt, frost, wildlife, pests, disease, lack of proper maintenance, or acts of God are excluded from this warranty. Additionally, anything underground that cannot be marked by "No Cuts", if damaged, is not covered in the above proposal. Unless specifically quoted, this job only includes an irrigation check. If irrigation services are required, an additional bid will be submitted. If the additional bid is not accepted, DTE is not responsible for loss of materials installed. This proposal is subject to our Terms & Conditions at https://dtelandscape.com/terms-and-conditions/.

EXHIBIT 5

Field Operations

Entry #	Date Create	Name	Address	Message	Response	Resolution / Date
138	2025-07-09	LANDRY	17555 SAWGRASS BAY BLVD	Resident Mike Deslauriers at 17613 Serenoa Blvd reports, As we hit July, it marks 3 years since I reported that the monument lights at the first half of Sawgrass Bay Blvd don't work. This includes the ones at the entrance to Villages 1 & 2. There's been back and forth about installing power for Christmas lights. It doesn't make sense to me why they would have this go on this long to try to solve for a couple of weeks a year. I'm not sure if the POA may have more influence on the work, but I keep getting "we're working on it" when I put in Work Orders with the CDD. The portion of the road past the Club House does still work.		
133	2025-07-07	LANDRY	17555 SAWGRASS BAY BLVD	at the edge of the neighborhood, a tent in the woods. just as you get past the Sawgrass neighborhoods on the right, you can see a cream colored tent of some sort in the woods.	determined to be an umbrella - which was removed	24-Jul
153	2025-08-18	LANDRY	17555 SAWGRASS BAY BLVD	the Serenoa Lakes sign is showing noticeable fading—especially on the brown wood sections and lower stone. The fence pillars at the end of the Entrance on Sawgrass are also fading and stone stained, similar to the clubhouse exterior. The fence itself at the entrance is also faded and chipping.		
147	2025-07-28	Weston	Edgemont/ Palms at Serenoa	Take a guess! Same fence panel boards dislocated. See pics		

Entry #	Date Create	Name	Address	Message	Response	Resolution / Date
144	2025-07-22	Agosto		2 signs on Sawgrass are on easement near clubhouse. - issue as school starting soon. Village 3 - right side as your leaving. Bushes need to be trimmed back because when you open gate to leave it hits bushes causing insects to come out and gate doesn't close. As you enter box blocked by bushes. Both sides need to be trimmed back. Lastly, bushes on Sawgrass should be trimmed (sidewalk and possibly road) as they are taking over sidewalk which is being used by bicyclists and pedestrians.		
141	2025-07-15	Holden	3855 Goldenrod Court	The splash pad at the community clubhouse is missing a bolt on one of the plastic pieces (refer to photo) which is creating a hazard for my toddler.	Not a CDD amenity, forwarded to HOA & POA & requester informed	
140	2025-07-15	Corona	17555 Sawgrass Bay Blvd	The first photo shows the bushes preventing the gate at Village 3 from closing properly when you exit to close it. You have to stand there to ensure it closes. (This is on the left side as you enter the complex.) The second photo shows a fallen sign on the grass. Landscaper was trimming there today. We're not sure if the landscaper would report the issue. It could be the pedestrian sign.	7/30 email: Thank you for your input on the landscape – it was forwarded to the Field Manager and landscape Account Manager. Concerns regarding Lake County's traffic signs should be submitted to the County directly. You can use Lake County's Road Reporter or contact Lake County Road Operations.	7/30 CAM reported sign to Lake Co. 7/24 Landscape vendor cut back Vlg 3 bushes
131	2025-06-30 17:04:53	Mastrangeli	17908 Passionflower Cir	The area at Sawgrass Bay Blvd and Pacifica Way where the future commercial property sits is in need trimming and mowing and general clean-up of debris that has accumulated over time. Can you please request the owners of that property address the current appearance.		
130	2025-06-30	Mastrangeli	17908 Passionflower Circle	Fountain is off or needs attention as its current not working, thanks Gene Mastrangeli		
128	2025-06-24	Holden	3855 Goldenrod Court	The Water Fountain faucet handle sticks and stays on causing the water to run endlessly until dislodged.	Auto Stop fixed	24-Jul

Entry #	Date Create	Name	Address	Message	Response	Resolution / Date
119	2025-06-10	Leonard	3921 Duval Ct	Notifying of the deteriorating condition of the sidewalk expansion joint material	District Engineer to review 6/13	
108	2025-05-12	Weston	17686 Blazing Star Cir	Here we go again on a smaller scale…the fence panel are in need of repair. See pics	5/19 Various panels reinstalled by FM. Requested DR Horton have vendor fixed remaining panels. 6/3 DR Horton response: I have already contacted my contractor to do a site visit and see why this happened and to provide a fix. 6/11 DM follow up: I wanted to check in with you and see what the contractor found out about the fence at Edgemont? 6/11 DR Horton response: Some panels blew out. All the posts were solid. With vinyl fences panels will blow out from time to time.	
76	2025-03-11	LANDRY	17555 SAWGRASS BAY BLVD	broken sidewalk- safety hazard on the duval cul de sac - needs to be fixed	5/1 A repair request was submitted to Lake County Public Works for the sidewalk repair at the end of Duval Court. A County rep. came out to evaluate the sidewalk and determined the damage was caused during construction. We have forwarded a request to DR Horton to address the damaged sidewalk. (Sidewalks are part of the County-maintained right-of-way)	

Streetlights

Entry #	Date Create	Name	Message	Response	Resolution / Date
152	2025-08-18 :	Prabhu	Streetlights Village 3 - Serenoa Lakes Not Working Want to bring to your attention that the street light I front my home #121 is not working for several weeks now. Called the 1800 number, no response		
36	2025-08-12 :	Likeum	Hi Address of the light is North corner of the 2425 Southlawn Ln in village 3 lot		
35	2025-07-29 :	Mastrangeli	Reporting street light Pole #42 that on any given night is either out and not working for a couple days, Flickers off and on, or is dimmer then normal. I also don't think the secondary brightness level when walking under the light is working either.		
34	2025-06-25 :	Middlebrook	Edgemont Pole #22 is not working any longer. It is located near the entrance to the community behind 3800 Paragon Lane on the corner.		
33	2025-06-23 :	Deslauriers	Pole # 2 along the village 2 visitor lane is not working.		
436	6/17/2025	Bolish	Hello! The streetlight that sits between our property and our neighbor has a broken plastic collar. Grass and weeds are growing up between the collar and the pole itself.	*(contact form used with no recipient selected)* *6/20 Forwarded to streetlight vendor*	
101	2025-05-01 :	Vaz	Need more light poles on Edgemont, Duval CT cul de sac/ unlit area of sidewalk not safe at night to walk this area.	*(Lights installed by developer per light study - CDD accepts conveyance of existing - end of Duval Ct borders conservation w/no through road)*	
32	2025-04-26 :	davis	3416 Yellowtop Loop, PAS HOA said they reported this. Not following up.		
89	2025-04-17 :	Mastrangeli	Driving down Sawgrass Bay the evening of 4/15/25 after dark, all but two of the solar monument lights were not working. The only two that were lite up was one at V3 entrance and the other was at V1 south entrance. Please have someone look at the reason the monument lights were not working and develop a plan to correct the issues. Thanks Gene Mastrangeli	Static electricity build up - Grounding kits to be added in June/July 2025 per streetlight update presented at March 27 meeting	

EXHIBIT 6

SWINE solutions

Wild Pig Removal

When "This Little Piggy" Has to GO!

We are proud to be a part of the solution for our area's wild hog problem.

BUSINESS PROPOSAL

WHAT ARE **FERAL SWINE**

Feral swine are the same species, Sus scrofa, as pigs that are found on farms. Feral swine are descendants of escaped or released pigs. Feral swine are called by many names including; wild boar, wild hog, razorback, piney woods rooter, and Russian or Eurasian boar. No matter the name they are a dangerous, destructive, invasive species. History of feral swine in the Americas Feral swine were first brought to the United States in the 1500s by early explorers and settlers as a source of food. Repeated introductions occurred thereafter. The geographic range of this destructive species is rapidly expanding and its populations are increasing across the nation.

Feral Swine Destroy Property

Feral swine can destroy lawns, gardens, ornamental plantings, and trees through rooting. They can also damage landscaping, fences, and other structures reducing the aesthetic value of the property. Although most often associated with rural areas, feral swine are increasingly causing damage to residential property, golf courses, beaches, and parks. Furthermore, feral swine can cause considerable damage when involved in vehicle collisions such as with cars and motorcycles.

Feral swine cause great risks to human health and safety, by harboring and transmitting diseases to people and pets Feral swine are known to carry at least 30 viral and bacterial diseases and nearly 40 parasites that can be transmitted to humans, pets, livestock, and other wildlife.

There are a variety of techniques that can be used to manage the damage caused by feral swine.

Not all techniques are suitable in every location or situation and, often, a combination of methods must be used to ensure success.

The most successful feral swine damage management strategies employ a diversity of tactics in a comprehensive, integrated approach. Factors to consider when choosing a management method(s) are overall objectives, landscape, environmental conditions, feral swine behavior and density, local regulations, and available funding. The appropriate method or combination of methods for the situation can be determined by utilizing the best information available which can be gathered from surveillance of damage and signs of feral swine on a specific property. Their reproduction rate is just off the charts, A female can have her firts litter at 7 months old and she can have around 12. Fifty percent of those would normally be female and these hogs can have up to three litters a year.

Proposal

Prepared For: Heath Beckett
Job Name: Avalon Groves CDD
Job Locat ion: Clermont

Starting Date: 2025
End Date:

We propose to furnish all materials and perform al labor necessary to complete the following:

Hunt and trap all feral hogs possible using state-of-the art GPS camera systems, night vision, trained K9's, and any other means necessary to control and eliminate the feral hog population. We DO NOT use any type of firearms to ensure the safety of residents and any other/all people around. Property and traps are monitored 24/7 via GPS/Mobile Cameras along with a representative of the company being onsite 2 to 4 times a week minimum to help eliminate and control the hog population onsite.

We have provided our services with great success to several properties throughout Hillsborough, Pasco, and Manatee County. Which include the following subdivisions and county preserves Panther Trace 1-2, River Reach, Carriage Pointe HOA/CDD, Tanglewood CDD, Belmount CDD, Concord Station CDD, Lower Green Swamp Preserve, Bell Creek Preserve, BlackWater Creek Preserve, Boyete Oak Scrub, and Menard Park, Reserve of Pradera CDD, Ballantrae CDD, Bexley CDD, Triple Creek CDD, Fishhawk Preserve, FishHawk Trails HOA, Wilderness Park CDD, Meadow Point CDD, JayMar Farms, Diehl Farms, Goodson Farms, Bickett Groves, Simmons Ranch, Double D Ranch, and Hillsborough County Parks and Recreations to name just a few

We specialize in hog removal with 15 years of experience. We take pride in being discreet (out of sight out of mind). We set the standards high in controlling the feral hog population. The purpose of this proposal is to assist the HOA/CDD, Property Management, and landowners in controlling feral hogs which cause tremendous and costly property damage as well as pose a serious health and safety risk to humans and other animals. We will continue to work efficiently and effectively using an integrated approach to remove feral hogs from the approved properties.

Our monthly service fee of $1850 per month. All service includes capturing feral hogs by any means necessary with the exception of firearms of any kind, camera set up and monitoring, bait to contain and capture the hogs in traps to prevent further property damage endured by the feral hogs. Extended contracts for 1 year or more are offered at a discounted rate. There is a set up or removal fee of $385 per trap location.

ANY AND ALL ILLEGAL ACTIVITY ON THE PROPERTY WILL BE REPORTED TO THE PROPERTY MANAGER ALONG WITH APPROPRIATE AUTHORITES.

We are fully licensed and insured by the State of Florida to remove all nuisance wildlife and have the Feral Swine Transport License as well. We strive to provide the best service at a reasonable cost. Our team have all been background checked. Never to have been convicted of a felony, or misdemeanor within the last five years

Under no circumstance shall this contract be superseded by any other terms or conditions other than stated agreement. Any alterations or deviation from the above specifications involving extra cost of material or labor will be executed, and will become an extra cost.

By signing this contract, you acknowledge the term to be Month to Month. If you choose to terminate this contract prior to the month term, you will still be billed for the remaining month there are no prorated fees. Upon termination of contract a 30-day written notice needs to be sent. All One-year or other contracts will continue unless a notice to end Service is submitted by signing this contract, you are agreeing to all terms and conditions.

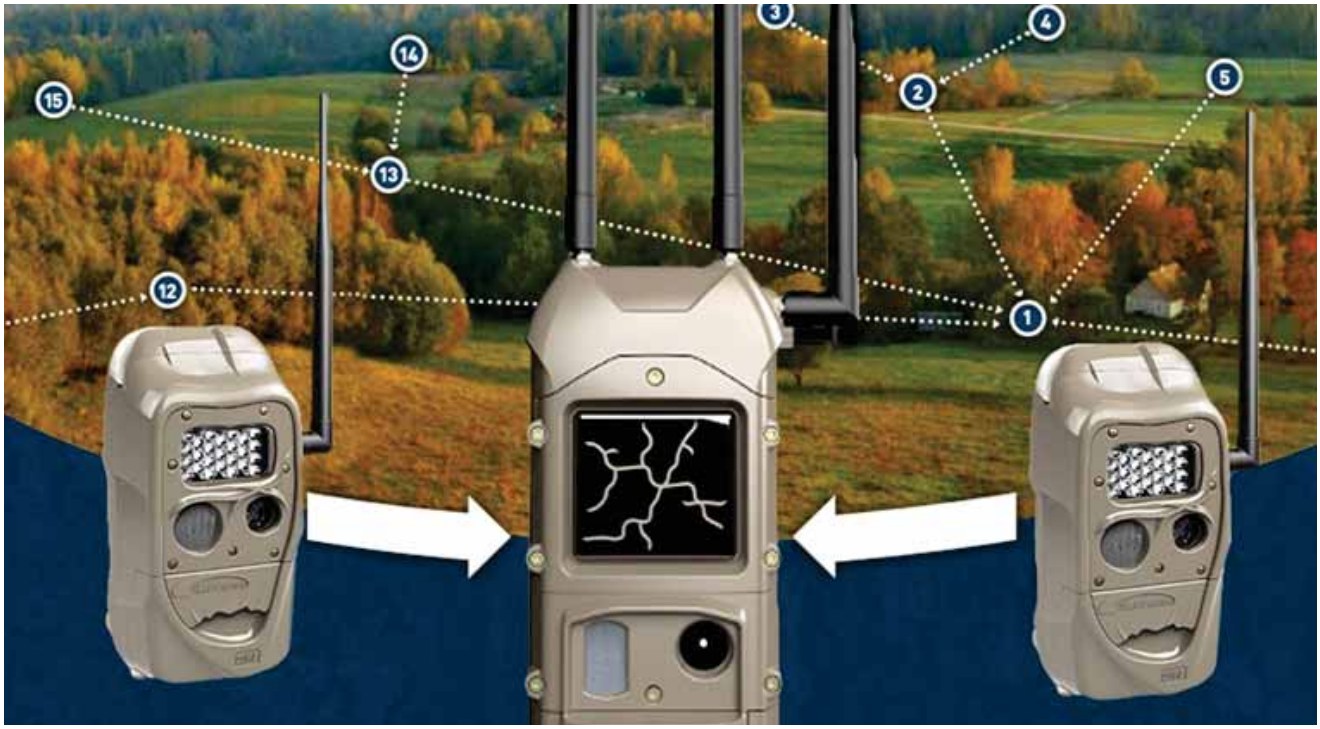
By signing this contract, you provide authorization for Swine Solutions LLC to set traps and Hunt feral Hogs. Swine Solutions LLC and his agents are authorized to set traps as he sees fit on the areas throughout the Land within Boundaries of said propriety where hog damage may occur.

Approved By: _____

Respectfully Submitted By: _____Thomas Sewell_____

Wireless Cameras allow us to monitor entire property and all active traps.

Here at Swine Solutions, we strive to be the best. We guarantee our work in the communities. We have a 100% success rate. We have worked all over central Florida to help communities remove the hog population and eliminate the damage they cause. We carry 2 million in liability and 500k in commercial auto insurance. We use state of the art cameras and traps. Look no further my friend. We are simply the best. Please consider Swine Solutions for all your feral hog needs.



Here at Swine Solutions we use several different kinds of traps. Round traps, Square Traps, and Corral Style Traps. These traps are mobile

These traps are mobile

SWINE solutions

BUSINESS PROPOSAL

12013 Rose Ln Riverview, FL 33569
Office: 813-365-2568
Call: 813-220-5878
Email: Thomas@swinesolutionsfl.com
SwineSolutionsFL.com

SWINE solutions

Wild Pig Removal

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BUSINESS PROPOSAL

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Proposal

Prepared For: Heath Beckett
Job Name: Avalon Groves CDD
Job Locat ion: Clermont

Starting Date: 2025
End Date: 2028

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Our monthly service fee of $1650 per month. All service includes capturing feral hogs by any means necessary with the exception of firearms of any kind, camera set up and monitoring, bait to contain and capture the hogs in traps to prevent further property damage endured by the feral hogs. Extended contracts for 1 year or more are offered at a discounted rate. There is a set up or removal fee of $385 per trap location.

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We are fully licensed and insured by the State of Florida to remove all nuisance wildlife and have the Feral Swine Transport License as well. We strive to provide the best service at a reasonable cost. Our team have all been background checked. Never to have been convicted of a felony, or misdemeanor within the last five years

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Approved By: _____

Respectfully Submitted By: _____Thomas Sewell_____

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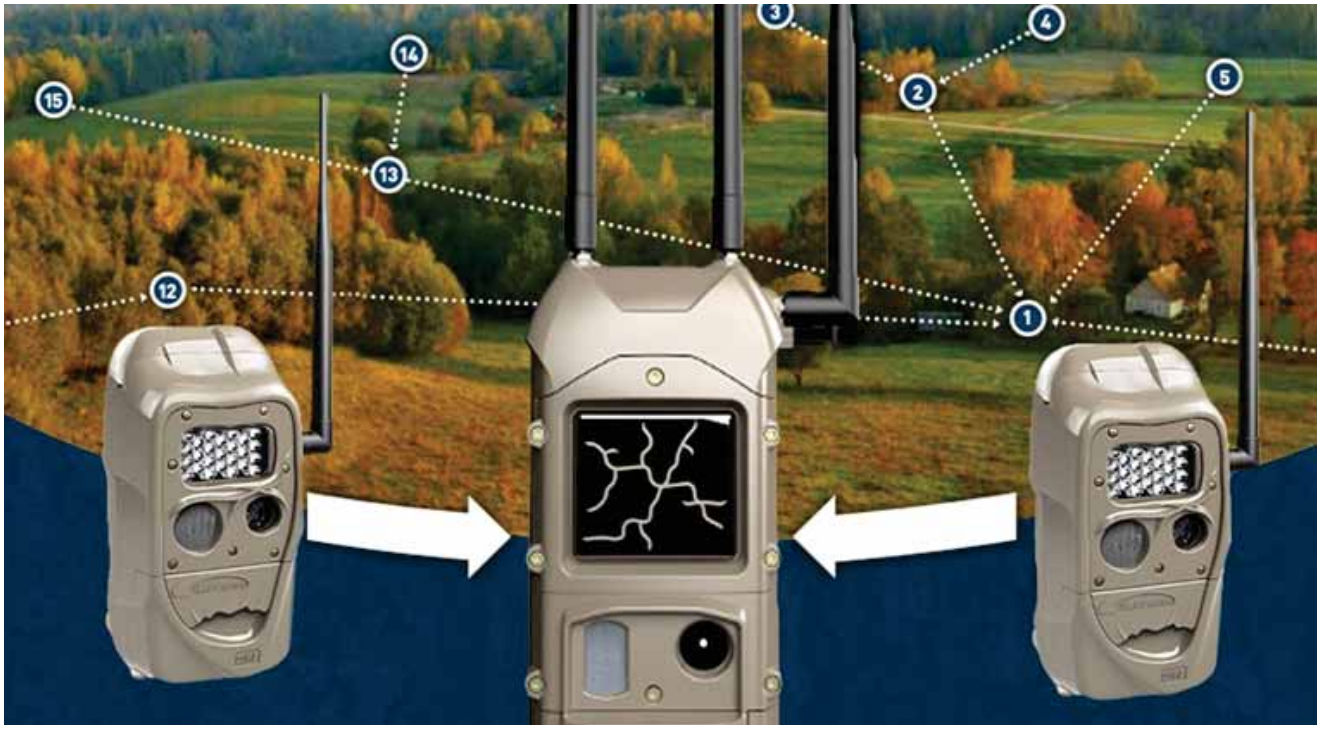

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SWINE solutions

BUSINESS PROPOSAL

12013 Rose Ln Riverview, FL 33569
Office: 813-365-2568
Call: 813-220-5878
Email: Thomas@swinesolutionsfl.com
SwineSolutionsFL.com

EXHIBIT 7

CustomReserves LLC

PREPARED FOR:

Avalon Groves Community Development District

Reserve Study Proposal

PREPARED BY:

Paul Grifoni, PRA, RS

Engineer
Reserve Specialist, RS
Professional Reserve Analyst, PRA
Licensed Home Inspector

Custom Reserves

5470 E Busch Blvd., Unit 171
Tampa, Fl 33617
Office: (888) 927-7865
Fax: (813) 200-8448
www.CustomReserves.com

Avalon Groves Community Development District
Reserve Study Proposal

Shirley Conley
Association Manager

Avalon Groves Community Development District
Reference #1555

17555 Sawgrass Bay Blvd
Clermont, FL 34714

Dear Board of Supervisors:

Thank you for the opportunity to be of service to your community. Custom Reserve's takes great pride in our work and in helping all our clients navigate through the Reserve Study process.

A Reserve Study is a key financial planning tool that helps Management and the Board in maintaining the common property components and planning for the future.

Included in Your Reserve Study:

- **Excellent communication** with our team. Custom Reserve's listen to its clients' concerns. From the timing of the inspection and report delivery to the financial or physical aspects of the community, Custom Reserve's always listen and hear your concerns.
- **Industry-leading experience** in all varieties of associations, community development districts, cooperatives commercial properties, and more! With over 25 years of experience in the industry, Custom Reserve's take the guess work out of budget season.
- **Timely contract completion** is a must. Custom Reserve's understands how important your receivables can be for budget and community meetings. Custom Reserve's takes great care in saying what it means and meaning what is said when it comes to delivery.
- **Accuracy** in results. The results depicted in a reserve study are only as good as the estimates of useful life, replacement cost and age of the individual components. More experience leads to greater accuracy in our product.
- **Relationship-building** is paramount. A reserve study should be updated periodically to keep up to date with changes in construction costs, inflation and interest rate, and new technology. Custom Reserve's puts our client relationships at the forefront of our core values.

Avalon Groves Community Development District
Reserve Study Proposal

Benefits of a Custom Reserves Report

Click Here
For More Information

- **Proper and accurate** reserve planning for the future
- **Increased awareness** of upcoming major property repairs and replacements
- **Maximized** property and re-sale values when adequately funded
- **Increased** likelihood of loans being granted by lenders when adequately funded
- **Decreased** stress in knowing that a special assessment is not looming around the corner!

Florida Clients Served

Avalon Groves Community Development District
Reserve Study Proposal

Report Content and Data Visualization

CONDITION MODEL

Component Type	Component Name	Condition	Urgency	1st Year of Replacement
Exterior Building	Chimney Caps, Partial Replacements	5		2027
Exterior Building	Roofs, Aluminum-Coated Shakes (Incl. Soffit and Fascia)	6		2050
Exterior Building	Walls, Siding, Wood, Paint Finishes, Phased	6		2023
Exterior Building	Walls, Siding, Wood, Partial Replacements	6		2023
Property Site	Asphalt Pavement, Crack Repair and Patch	4		
Property Site	Asphalt Pavement, Mill and Overlay, Phased	4		
Property Site	Concrete Streets and Common Flatwork, Partial Replacement	5		
Property Site	Light Fixtures, Bollards (Incl. Pool Area)	6		
Property Site	Pipes, Subsurface Utilities, Partial Replacement	7		
Clubhouse	Clubhouse, Deck, Composite and Wood, Replacement (Incl. Rail)	10		
Clubhouse	Clubhouse, Exterior Renovation	7		
Clubhouse	Clubhouse, HVAC Equipment, Replacement	7		
Clubhouse	Clubhouse, Interior Renovations	6		
Clubhouse	Clubhouse, Parking Area and Pool, Light Poles and Fixtures	7		
Clubhouse	Clubhouse, Roof, Aluminum (Incl. Gutters and Downspouts)	8		2050
Clubhouse	Clubhouse, Windows and Doors	6		2028
Pool	Pool, Bulkhead, Wood, Replacement	3		2024
Pool	Pool, Deck, Pavers, Replacement (Incl. Clubhouse Area)	4		2028
Pool				
Pool				
Pool				

Easily view components by **Condition** and **Urgency**

PROPERTY COMPONENT MODEL

COMPONENT	COMMON COMPONENTS (X)			REMAINING COMPONENTS (O)	
	RESERVES	OPERATING	LONG-LIVED	OWNER	OTHER
Asphalt Pavement, Crack Repair and Patch	X				
Asphalt Pavement, Mill and Overlay, Phased	X				
Chimney Caps, Partial Replacements	X				
Clubhouse, Bicycle Rack		X			
Clubhouse, Deck, Composite and Wood, Replacement (Incl. Rail)	X				
Clubhouse, Exterior Renovation	X				
Clubhouse, HVAC Equipment, Replacement	X				
Clubhouse, Interior Renovations	X				
Clubhouse, Parking Area and Pool, Light Poles and Fixtures	X				
Clubhouse, Roof, Aluminum (Incl. Gutters and Downspouts)	X				
Windows and Doors	X				
iveways at Cluster Homes				O	
eets and Common Flatwork, Partial Replacement	X				
ge, Serving Cluster Homes				O	
alkways, Serving Cluster Homes				O	
ss Than $7,000		X			
s					O
s]			X		
and Associated Components					O
Downspouts, Serving Cluster Homes				O	
ystem Air Conditioners, Serving Cluster Homes				O	
rrigation System, Controls		X			
Irrigation System, Pumps		X			
Light Fixtures, Bollards (Incl. Pool Area)	X				
Light Fixtures, Exterior, Serving Cluster Homes		X			
Light Poles and Fixtures at Streets					O
Other Repairs Normally Funded Through the Operating Budget		X			
Pipes, Subsurface Utilities, Partial Replacement	X				
Ponds, Serving Golf Course					O
Pool, Bulkhead, Wood, Replacement	X				
Pool, Deck, Pavers, Replacement (Incl. Clubhouse Area)	X				
Pool, Fence, Metal, Replacement	X				
Pool, Finishes, Plaster and Tile (Incl. Coping)	X				
Pool, Structure and Deck, Total Replacement	X				
Pool, Trash Receptacles		X			

Easily view components by **Funding Source** and **Responsibility**

Avalon Groves Community Development District
Reserve Study Proposal

Objectives

Conduct an on-site inspection of the common property, document condition and forecast a customized funding plan required to replace or repair these elements as they wear out over the course of their useful lives.

Scope of Services

1. An on-site meeting with Management and/or the Board.
2. Physical Analysis that includes an on-site inspection of the common property documented by photographs.
3. 30-year replacement/repair schedule that includes custom useful lives.
4. Financial Analysis with a 30-year Cash Flow and/or Component method of funding.
5. Electronic copy in PDF format of the Reserve Study that includes a detailed narrative including tables, graphs and charts depicting the findings.
6. Expenditures and Funding Plan in Excel upon request.
7. One hard copy of the Full Reserve Study upon request.
8. Free unlimited phone and online support.
9. One revision of the study up to the end of the current fiscal year.

Affiliations

Our services are provided by an Engineer with reserve study credentials from the Association of Professional Reserve Analysts (APRA) and Community Associations Institute (CAI). Additional qualifications include a Licensed Home Inspector with the Florida Association of Building Inspectors, construction management experience including estimating and scheduling.

Custom Reserves experience includes inspection and condition analysis of hundreds of communities. A partial list of relevant experience is included on the last page.

When the Reserve Study is complete, your community will have access to live support and edit capability until the budget is approved. These revisions include adjustments to variables such as costs, times of replacement, inflation, and interest rates.

Cost estimates are based on localized information gathered from resources that include, but are not limited to, local vendors and industry databases, combined with experience in home building, site development and actual data gathered from conducting thousands of reserve studies, collectively. Useful lives are generated from several factors such as environment, construction materials and historical information.

Client Responsibilities

This project requires involvement by your accounting personnel. To help achieve a smooth and successful implementation, it will be your responsibility to perform the following:

1. Include a copy of the financial statements i.e. (balance sheet, income statement and/or copy of the annual budget along with other financial reports.)
2. Supply the governing documents if applicable.
3. Provide access to all common areas.
4. Disclose known historical information.

Report Use

You may show our report in its entirety to those third parties who need to review the information contained herein. The Client and other third parties viewing this report should not reference Custom Reserves or our report, in whole or in part, in any document prepared and/or distributed to third parties without our written consent. This report contains intellectual property by Custom Reserves, LLC specified to this engagement.

Client agrees to indemnify and hold harmless Custom Reserves against any and all loses, claims, actions, damages, expenses or liabilities, including attorney's fees, to which Custom Reserves may become subject in connection with this engagement, because of any false, misleading or incomplete information supplied by client or third parties under client's control or direction.

The inspection and analysis of the subject property is limited to visual observations and is noninvasive. Custom Reserves does not investigate, nor assume any responsibility for any existence or impact of any hazardous materials, structural, latent or hidden defects which may or may not be present on or within the property. Our opinions of estimated costs and remaining useful lives are not a guarantee or a warranty of the common components.

Client Name

Custom Reserves maintains the confidentiality of all conversations, documents provided and the contents of the report, subject to legal or administrative process or proceedings. These conditions can only be modified by written documents executed by both parties.

Click Here
For Sample Report

Components Anticipated to be Included in Your Custom Reserve Study

Component Category	Component Name
Property Site	Covered Seating Area | Fences | Irrigation System | Lighting | Mailboxes | Parking Area | Playground Equipment | Ponds | Storm Water System | Signage | Retaining Walls

Confirmation of Services

Fee estimates are based on the components summarized in the previous table. The fee for this Full Reserve Study is ---------- **$4,700**.

Available option below:

☐ **Reserve Plan Software** **$450**

Annual subscription for Reserve Plan software allows users to adjust for various scenarios.

Custom Reserves appreciates the opportunity to be of service. Upon acceptance of this proposal, **please sign and return this page along with a fifty percent (50%) retainer payment**. We will contact you to schedule a site visit and inspection upon receipt of this payment. The remaining balance will be due upon receipt of the report.

This letter sets forth the understanding of the community and serves as confirmation of services provided by Custom Reserves.

Owner reserves the right to reject any and/or all Proposals received, and to rebid if the Owner deems necessary. Owner is not subject to pay any costs incurred by Vendors in the preparation and submission of their Proposals.

Sincerely,

Paul Grifoni, PRA, RS
Engineer
Reserve Specialist
Professional Reserve Analyst
Licensed Insurance Adjuster
Licensed Home Inspector

5470 E Busch Blvd., Unit 171
Tampa, Fl 33617
Office: (888) 927-7865
Fax: (813) 200-8448
contact@customreserves.com
www.CustomReserves.com

Accepted By | Title | Date

Experience

Experience includes condominiums, homeowners associations, planned unit developments, property owner associations, co-operatives and community development districts with construction styles that range from townhouses to hi-rises. Other experience includes specialty establishments such as golf clubs, international properties, vacation ownership resorts (timeshares) as well as worship, retreat and camp facilities.

A partial list of recent reserve study experience follows below:

Sullivan Ranch is a planned unit development located in Mount Dora, Florida and is responsible for the common components shared by 692 homes established in 2006. The Association is also responsible for the replacement of the roofs and painting of a Service Area that comprises 34 Villas and 32 Garden units. The development contains clubhouse, pool and property site components.

Deer Creek RV Golf & Country Club, Inc. is a planned unit development located in Davenport, Florida responsible for common property shared by six communities established in the late 80's and built up to 2005. The development contains an executive style 18-hole golf course, administration, clubhouse, pool and property site components.

Harbor Bay Community Development District owns and operates the community areas of Mira Bay in Apollo Beach FL including common areas, recreational facilities, public roadways, storm water management systems, street lighting, landscaping, clubhouse with café, lap pool, waterslide, clay tennis courts 35,000 linear feet of sea wall, boatlifts.

Terra Bella Community Development District is a local unit of special purpose government located within Land O' Lakes, Florida and is responsible for the common elements shared by 253 property owners. Terra Bella CDD was built around 2011. The development contains streets, irrigation, pavers, concrete flatwork, retaining walls, signage and a storm water system.

Oak Creek Community Development District is a local unit of special purpose government located within Pasco County, Fl established in 2004 and responsible for the common elements shared by 550 homes. The development contains a pool, playground, security system and ponds.

Ballantrae Community Development District is a local unit of special purpose government located within Pasco County, Fl established by the county in 2004 and is responsible for the common elements shared by 936 homes. The development contains building, pool and property site components.

FLORIDA RESERVE STUDY AND APPRAISAL

July 19, 2025

Avalon Groves CDD
c/o Vesta Property Services
250 International Parkway, Suite 208
Lake Mary, FL 32746

RE: Full Service Reserve Study with Site Inspection
Avalon Groves CDD
17555 Sawgrass Bay Blvd
Clermont, FL 34714

Dear Board of Supervisors:

We are very appreciative for the opportunity to perform a full reserve study with site inspection and recommendations for Avalon Groves CDD. We are a team of knowledgeable reserve analysts with extensive experience and take pride in performing reserve studies. The reserve study will project costs and funding for a 30 year time frame for all common areas and improvements.

Avalon Groves CDD commenced operations in April 2016. The community started home construction in 2018 and it continued until buildout was reached in 2025. The community is comprised of single family homes and multifamily homes. There are 1,745 total community units (1,475 equivalent units). The CDD consists of 1,011 acres and is located in Clermont, Lake County, Florida. After a review of plats, aerials, and county records, we recommend the following reserve items be included in the report:

- **Landscaping and Lighting**
- **Irrigation**
- **Fencing**
- **Retaining Walls**
- **Ponds**
- **Stormwater Drainage**
- **Monuments**
- **Parking Spaces (Goldcrest Loop)**
- **Shade Pavilion**
- **Fountain**
- **Playground**
- **Mail Boxes**
- **Any Other Items Specified by You**

The physical analysis portion of the reserve study will include a reserve item component list, remaining life, useful life, current cost, future cost of all reserve items as well as any site recommendations. The financial analysis portion of the study will include allowances for your interest income, taxes and projected changes in building costs. The pooled method and component method (if applicable) will be used and presented to derive the funding schedules.

PHONE : 813.932.1588
FAX : 813.388.4189
WEB : www.reservestudyfl.com
ADDRESS : 12407 N Florida Ave, Tampa, FL 33612

Scope of Service

Our scope of service for a full service reserve study with site inspection that includes all expenses consists of:

- Site inspection of common areas and improvements with both a Certified General Contractor and a CAI-designated Reserve Specialist (Both are degreed engineers).

- Our user-friendly reserve study report that includes narrative, photographs, pooled method cash flow plan, component method plan (if applicable), reserve item component cost, remaining life, and useful life inventory. The report projects costs and funding for 30 years using localized costs.

- Percent Funded Analysis. This compares what you have in reserve funds to what the ideal amount should be, something many reserve studies do not include.

- One site meeting with management or the board on the day of inspection, if requested.

- Electronic copies of the report. Electronic copies can also be requested any time in the future by email. A hard copy is available free of charge upon request.

- Revisions or amendments of reports for up to 90 days from the first submission of the report. We welcome all feedback. (It is not uncommon for there to be one or two refinements of the report to meet your specific requirements).

- Accessibility. Call, write, or email us any time and you will receive prompt follow-up. We aim to exceed expectations and consider customer service our top priority.

- 30 year cash flow plan in the report.

- Review of plats, drawings, and site aerials.

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ADDRESS : 12407 N Florida Ave, Tampa, FL 33612

Qualifications

Paul Gallizzi and Steven Swartz are professionals in the business of preparing reserve studies and insurance appraisals for community associations. We both inspect all properties and have provided detailed analysis of over 300,000 single family, apartment, villa, townhome, and condominium units. Our high repeat customer rate indicates high customer satisfaction. We have prepared reserve studies and insurance appraisals for all types of community associations including high rise condominiums, mid-rise condominiums, garden-style condominiums, office condominiums, medical condominiums, townhouse developments, single family residential homeowners associations, community development districts, and special use facilities.

We both hold engineering degrees from fully accredited universities. Paul is a State Certified General Real Estate Appraiser License Number RZ 110 and a State Certified General Contractor License Number CGC 019465 with over 30 years of experience in each. Steven is one of approximately only 200 people nationwide that have earned the designation of Reserve Specialist (RS) from the Community Associations Institute and is a State Certified General Real Estate Appraiser License Number RZ 3479. He has also been a speaker at CAI functions discussing reserves and budgeting. To learn more, please visit us on the web at www.reservestudyfl.com and visit our articles section for more than 50 articles about reserves, funding, and budgeting.

A partial list of our clients include:

- Greenacre Properties
- Standard Pacific Homes
- Leland Management
- M/I Homes
- Associa Gulf Coast
- Sentry Management
- Starwood Land Ventures
- Management & Associates
- Resource Property Management
- Condominium Associates
- Insurance Office of America
- Argus Property Management
- Creative Management
- Many Other Individually Managed Associations
- The Mahaffey Apartment Company
- Rizzetta & Company
- First Service Residential
- Brown & Brown Insurance
- Taylor Morrison Homes
- Vanguard Management Group
- Lennar Homes
- McNeil Management Services
- Development Planning and Financing Group
- Qualified Property Management
- Avid Property Management
- Southshore Property Management
- Terra Management Services

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Experience

Here is a short list of communities we have conducted reserve studies for, showing experience with various construction types, building systems, and community amenities:

Fishhawk CDD I, CDD II, CDD III, & CDD IV, Lithia, Florida
Fishhawk Ranch is a large planned community consisting of approximately 3000 acres in Lithia, Florida. It is comprised of numerous single family home subdivisions as well as a few townhome subdivisions. There are many community amenities including swimming pools, clubhouses, tennis courts, playgrounds, fitness centers, a banquet center, running trails, parks, and various others. The District also maintains the ponds, stormwater drainage, and the entry areas. There are a total of 6,286 members.

Heritage Harbour South CDD, Bradenton, Florida
Heritage Harbour South CDD is comprised of single family residential and multifamily residences. The community started construction in 2002 and construction finished in 2006. Overall, there are 1,523 units. The CDD maintains the baseball field and recreation area. The District also maintains the streets, ponds, stormwater drainage, and the entry areas. The CDD encompasses a total site size of 980.79 acres in Bradenton, Florida.

Venetian CDD, Venice, FL
Venetian CDD commenced operations in September 2002. The Venetian Golf and River Club has 1,377 lots planned primarily for single family residential development as well as a small amount of multi-family development. The River Club recreation area was built in 2004 and includes a clubhouse, kitchen and banquet facilities, fitness center, pool area, tennis courts, as well as other amenities. The District also maintains the streets, ponds, stormwater drainage, and the entry areas. The CDD encompasses a total site size of 964 acres.

Riverwood CDD, Port Charlotte, FL
Riverwood CDD started development in the mid 1990s and most of the construction was complete over the next decade. The District maintains an amenity campus with a clubhouse/athletic center, pool area, tennis, and shuffleboard courts. The district also owns an off-site Beach Club on Manasota Key in Englewood. The Beach Club was built in 2003 and acquired in 2014. Additionally, the District also maintains the streets, potable water system, re-claimed water system, sewer system (and plant), and stormwater drainage.

Two Creeks CDD, Middleburg, FL
Two Creeks has 624 platted lots planned for single family residential development and encompasses 625 acres. The community was platted in June 2007. Within the district, there is a recreation comprised of a clubhouse, pool area, 2 tennis courts, a basketball court, playgrounds, and a volleyball court. The community also maintains the ponds, stormwater drainage, and the entry areas.

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ADDRESS : 12407 N Florida Ave, Tampa, FL 33612

FLORIDA RESERVE STUDY AND APPRAISAL

Services

The fee schedule for the current assignment is as follows, please sign below to confirm your acceptance:

Full Service Reserve Study with Site Inspection (Level-1) **$4,900**

We will provide you with electronic copies of the report. Payment will be due at the first submission of the report. The report will be completed within eight weeks of our firm receiving this engagement letter signed and faxed or emailed to our office.

Thank you again for the opportunity to present our proposal to you.

Sincerely,

Paul Gallizzi
Florida General Contractor #CGC-019465
State-Certified General Appraiser RZ110

Steven Swartz, RS
Reserve Specialist Designation No. 214
State-Certified General Appraiser RZ3479

_____ _____
Accepted by Signature: Date

Accepted by Printed Name: _____

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FAX : 813.388.4189
WEB : www.reservestudyfl.com
ADDRESS : 12407 N Florida Ave, Tampa, FL 33612

Reserve Study Institute, LLC

Your property's future starts with
A Reserve Study Today.

We prepare conservative reserve studies so you can make informed decisions on setting aside the financial resources to maintain your property the way you want over time.

Traditional Reserve Study Proposal

Avalon Groves Community Development District

July 21, 2025

Proposal Number: 25.07.21.244

20+	7,901	$2,193,019,666
Years Combined Experience	Components Evaluated	Funding Guidance Provided

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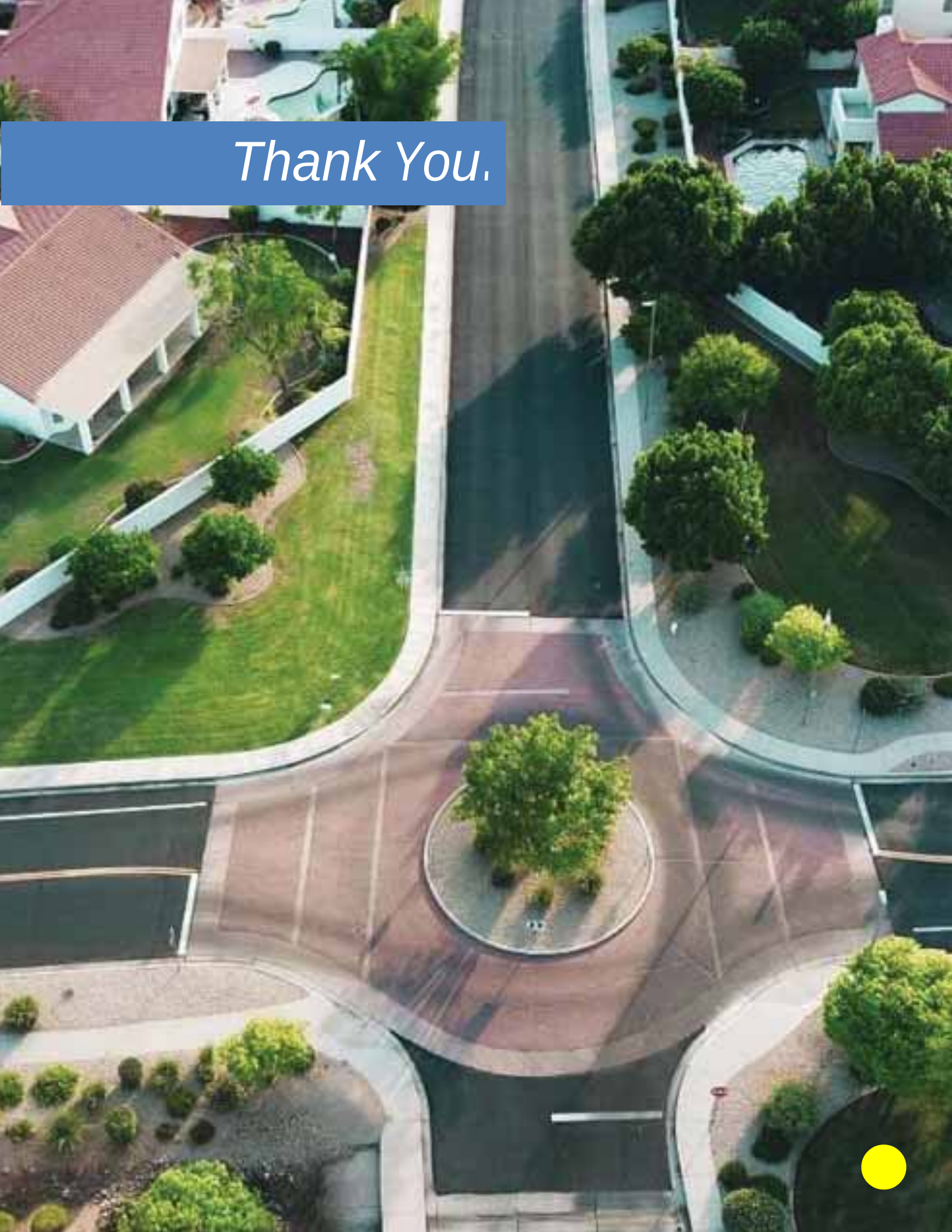

Thank You.

Reserve Study Institute, LLC

THANK YOU FOR YOUR TRUST

July 21, 2025

Avalon Groves Community Development District
C/O Shirley Conley, Administrator
Vesta District Services
250 International Parkway #208
Lake Mary, FL 32746

Dear Ms. Conley:

We are pleased to submit this reserve study proposal for Avalon Groves Community Development District (the "Association") to you.

Our mission is to provide you with a conservative reserve study, giving you the best opportunity to set aside the financial resources needed to maintain your property's appearance and value over time.

We want you to feel comfortable and confident in the quality of our work. That is why we show you our sample report before you even consider doing business with us. We recommend that you review this because we prefer to lose your business than provide you with services that do not meet your objectives.

We always ask for more time than we think we need in our proposals because we prefer that you be pleasantly surprised when we deliver early rather than being disappointed if we were to be late.

Sound fair and reasonable?

Sincerely,

Glenn Tyndall

Glenn M. Tyndall, Jr., CPA, PRA, CEO and Founder

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EXECUTIVE SUMMARY

Introduction

A reserve study is a capital budgeting tool that is designed to establish a funding plan to offset the deterioration of a property that happens over time.

Objective

Our mission is to prepare conservative reserve studies so you can make informed decisions on setting aside the financial resources to maintain your property the way you want over time.

Methodology

A reserve study may include:

- An onsite visit with a non-invasive, visual inspection only.
- Representative sampling of components to take their counts and measurements.
- A photographic inventory of components.
- A financial analysis that includes a funding plan.

A reserve study does not include:

- A guarantee that no special assessments will be required in the future.
- Invasive, destructive testing, or forensic testing.
- Design, build, engineering, architectural, or appraisal services.
- Recommendations on repairs to be done or 3rd party contractors to be used.

Findings

Our findings will be presented in a reserve study report, and we try to be conservative in our estimates. We will provide a sample report for the services requested before you even consider doing business with us. We prefer to lose your business rather than to profit from delivering to you a service that you do not need or that you will not be 100% satisfied with. **That's why we strongly recommend reviewing this sample report to ensure our report will meet your needs and objectives before you engage us for services.**

Recommendations

We will give you our opinion on funding, although our opinion is one of many. Therefore, when possible, we will incorporate the changes requested by you as management or the Board as it's your study and you should have the peace of mind to know that we will incorporate your goals into the study when possible.

Fee For Service

See the end of this proposal for our fees for services.

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When Needed.

Reserve Study Institute, LLC

EXECUTIVE AND SENIOR PROFESSIONALS

GLENN M. TYNDALL JR., CPA
Founder & CEO

MICHAEL H. RUSS JR.
Senior Reserve Study Analyst

Founder: Glenn Tyndall, Jr., CPA
B.B.A, University of North Florida

Bio: Mr. Tyndall founded Reserve Study Institute after working in public accounting for more than 15 years, which included over a decade as the principal of a CPA firm in which he provided clients with audit, tax, and consulting services. He has worked with community associations, non-profits, labor unions, trade associations, property and casualty insurers, real estate companies, and high-net-worth individuals.

Senior: Michael H. Russ, Jr.
Economics, Florida State College

Bio: Mr. Russ began consulting with Reserve Study Institute, LLC after experience in construction and the financial services industry. Mr. Russ established the residential construction firm, Florida Construction Industries, Inc. Mr. Russ has also worked as a financial advisor at National Financial Services Group, a leading global financial services firm, in which he conducted financial and investment analyses and prepared and reviewed complex financial models for corporate and high net worth clients.

Analysts: Jenny Serrato, Financial Reporting Analyst
Daniel Coons, Reserve Study Analyst
Mike Gamez, Reserve Study Analyst
Angel Gamez, Reserve Study Analyst

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How We Help You.

Reserve Study Institute, LLC

HOW DOES OUR COMPANY HELP YOU

1. **Comprehensive Expertise:** Benefit from our comprehensive expertise, including a CPA on staff for financial insight and field analysts with backgrounds in the construction or related industries. The firm is a member of the Association of Professional Reserve Analysts (APRA).

2. **Conservative Estimates:** Rely on our commitment to providing conservative estimates, ensuring a productive approach to financial planning for your community association.

3. **Specialist Recommendations:** When our field analysts reach their professional limits, we transparently recommend you contact third-party specialists to help ensure the most accurate and reliable results.

4. **Client-Centric Approach:** Experience a client-centric approach where your feedback matters; we actively engage with clients, updating studies based on their input to ensure relevancy and accuracy.

5. **Clear Communication:** Enjoy clear and consistent communication throughout the process, ensuring you are informed and confident in every step of the reserve study.

6. **Reader-Friendly Reports:** Receive reader-friendly reports that stand out for their clarity and accessibility, avoiding the common pitfalls of overly complex documents from other reserve study companies.

7. **Responsive Updates:** We prioritize timely updates, responding to client needs, and making necessary changes to keep your reserve study current and actionable.

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See Our Experience.

Reserve Study Institute, LLC

THE COMPONENT'S WE'VE EVALUATED

Experience matters so we want to show you some of the components we've evaluated in the past in other reserve studies so you have peace of mind knowing we have the experience to help you with your study.

7,901 Components Evaluated	By Our Professionals for Our Clients

Homeowners' Associations

Homeowners' Associations (HOA's) are usually are usually not responsible for the homes. They include components such as signage, roads, and sidewalks. Some even offer amenities which can include clubhouses, pools, and other recreational elements.

Condominiums and Townhomes

Condos and Townhomes usually include all the elements of an HOA, however, the association is responsible for all common areas and building exteriors. This can include roofs, exterior painting, balconies, and much more.

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High-Rise Towers

A building that is 15 stories or more is considered a tower. Aside from the sheer mass, towers have unique components not found in HOA's and Condos, such as cooling towers, domestic water pumps, heat exchangers, and more.

General Site Elements

General site elements are components that are located around the property but are not part of the building. These components include entrance gates, roads, and sidewalks to name a few.

Recreational Elements

Recreational elements are amenities the association is responsible for. This varies between every association and may include playgrounds, tennis courts, and pools.

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Mechanical Elements

Mechanical elements can be found in every type of study. This can include HVAC, generators, fire suppression systems and elevator equipment.

Waterfront Elements

Waterfront elements can be very costly and require long-term budgeting. Some of the elements may include docks, seawalls, and even boats for associations located on islands.

Specialty Elements

Each association is unique and oftentimes has specialty components. Some specialty elements associations have reserved for bridge repair and replacement, heavy equipment, and even a sewer treatment plant.

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Our Clients Talk.

Reserve Study Institute, LLC

What is it like working with us?
See What Our Clients Say About Their Experiences.

We want you to have peace of mind of knowing that we have the processes in place so you receive results similar to our past clients.

"If every vendor I did business with was as adept as Reverse Study Institute, every day for Alliance would be more profitable. These days we spend more time managing people despite our #1 task being managing real estate."

-Mr. Leigh Hoffman, Owner
Alliance Property Systems, Inc.

"Thanks for all the help you and your team provided our communities."

-Mr. Ryan Barlingar, LCAM
P&R Housing Management Corporation

"Please accept my humble thanks and appreciation for your recent completion of our HOA's Reserve Study. Your professionalism and comprehensive work made this process far easier for our Board of Directors and Community, than we could ever have imagined.

We dealt primarily with two individuals and their work was outstanding. Mike Russ was available at short notice and responded in a timely manner. Glen Tyndall "Shepherded & Managed" all entries to the Study and kept the process on schedule.

We couldn't have anticipated their willingness to adjust to our requests for additional information in such a timely and efficient manner.
Thanks again for your efforts and assistance."

-Mr. Rob Cowan, Treasurer
The Palms at Nocatee Homeowner's Association, Inc.

"That was quick!"

-Mr. Malcolm Ross Cummings, Board Member and Treasurer
Saphire Cove Homeowner's Association, Inc.

"Thanks so much Glen. You have been responsive, professional and efficient! Thank you! Your much appreciated."

-Mr. Tony Mastrocola, LCAM
Sentry Management, Inc.

"Thank you so very much. Appreciate the flexibility this first go-round."

-Ms. Catherine Carter, Board Treasurer
Canterbury Lake Estates Property Owners Association, Inc

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"Your firm turned around our study so quick."

-Mr. Malcolm Ross Cummings, Board Member and Treasurer
Saphire Cove Homeowner's Association, Inc.

"Thanks so much for the efficiency you have shown."

-Mr. Tony Mastrocola, LCAM
Sentry Management, Inc.

"Wow this is fantastic. Thank you! Your proposal makes sense and no further questions. Per the request of the board I reached out to two other companies, but you are the first to respond and your proposal is perfect with all the details. I will let the board know that you responded so quickly and send them your proposal".

-Ms. Sharon Hill, Community Association Manager
Specialty Management Company

"Thank you Glenn!! You are always on the ball, I can't recommend you enough."

-Ms. Anais Serrano, Community Association Management
Leland Management, Inc.

"I really appreciate the sample of the reserve study, I will save it and I definitely need this for several Associations."

Ms. Karen Preston, LCAM
Sunrise Management, Inc.

"This is great information; I will share with my Boards."

-Ms. Shanique Thompson, LCAM
Phoenix Management Services, Inc.

"Thanks for your efforts and the updates. Appreciate all your efforts, and those of Mike Russ. Very professional and comprehensive report."

-Mr. Rob Cowan, Treasurer
The Palms at Nocatee Homeowner's Association, Inc.

"Thanks for the quick response. I'll be working on our next budget in the next couple of weeks and this report will aid greatly."

-Mr. Walter Wiley, Board Treasurer
Woodland Lakes Homeowners Association, Inc.

"You're highly organized. Let's keep doing business together. Like your firm, mine gets no additional revenue chasing people to coordinate."

-Mr. Leigh Hoffman, Owner
Alliance Property Systems, Inc.

"Thank you for the thorough report your team has provided to us."

-Mr. Brook Ladd, Board Vice President
Baytree Villas Home Owners Association, Inc.

"Thanks for your excellent work."

-Ms. Joanna Patricia Fang, General Executive Manager
First Way Property Management Services, LLC

"Thank you, Glenn, I appreciate your diligent responsiveness!"

-Mr. Alberto Collins, LCAM
Infinity Community Management, Inc.

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FREQUENTLY ASKED QUESTIONS (FAQs)

Q: Does a representative have to be on-site?

A: We recommend that someone be onsite because it improves the quality of our services. However, while preferable, it is not required.

Q: How long until we receive a report?

A: We always ask for more time than we think we need in our proposal because we want you to be pleasantly surprised when we are early rather than disappointed if we were to be late.

Q: Can we reserve money in case of hurricane damage?

A: Absolutely. We can generally reserve intangible items like hurricane damage, general contingency, or litigation reserves. However, we will only do this at your direction as we do not reserve for items that we cannot see like this without explicit direction.

Q: Do you have a vendor you recommend for a project?

A: No. Reserve Study Institute does not provide recommendations for ethical reasons.

Q: What do we do if we feel that the cost, remaining useful life, or quantity total should be changed?

A: After receiving the draft, we offer a complimentary editing process within a reasonable amount of time.

Q: Why is there a recommendation to get a quote from a third-party vendor?

A: Many components have variables that we cannot account for. For example, we do not account for any code violations. Using the wrong nail on a roof could be a code violation and require replacement.

Another example is shoreline restoration. There are many ways to restore a shoreline including grading, geotubing, netting, vegetation, and installing seawalls or rip rap. In this case, we find it best to consult with a certified expert to find what is best for your community.

Q: Can we reserve for repairs for certain items?

A: Yes. There are multiple ways to do this. One is by using the historical data of the repairs that have been done and basing the future repairs on that. Another way is to take a percentage of the total replacement cost and reserve that over a period of time.

For example, there was a study that had approximately $7 million in bridges. Taking 15% of that over 10 years allows them to reserve approximately $1 million for repairs every 10 years. This number should also be adjusted based on the age of the structure.

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The Agreement.

AGREEMENT

The content provided in the previous sections of this proposal is intended for informational purposes only and does not constitute a legally binding agreement. The legally binding terms and conditions of our services are exclusively outlined in this legal agreement section of the proposal. Clients are advised to carefully review and adhere to the terms set forth in this section of the proposal for the establishment of a contractual agreement with Reserve Study Institute, LLC. This disclaimer helps to distinguish the preliminary information, which is not legally binding, from the specific terms and conditions outlined in this agreement section, which hold legal significance.

SCOPE OF SERVICES

Our Responsibilities

Reserve Study Institute, LLC will perform its services as an independent contractor in accordance with our professional practice standards. Our compensation is not contingent upon our conclusions.

Levels of Service

We offer the following Reserve Study Levels of Service to Associations:

Level 1 – Reserve Study Level 1 with an on-site visual inspection and assessment of property condition. This level of service is offered to clients undertaking their first reserve study, and to Associations in need of a comprehensive review and audit of a previous reserve study The Association's asset component list and associated measurements are reviewed. Reporting detail includes comprehensive reporting with a full detailed component inventory, photographs, observations and recommendations, life and valuation estimates, fund status, and funding plan.

If this proposal is for the Association's initial reserve study, or a previous reserve study cannot be made available to us, then this level of service is required.

Level 2 – Reserve Study Level 2 update with an on-site visual inspection and property condition assessment. Level 2 reserve studies are for Associations that want to update a previous study. Most Associations will request a Level 2 report in the third year after the last site-visit-based reserve study. Reporting detail includes comprehensive reporting with a full detailed component inventory, photographs, observations and recommendations, life and valuation estimates, fund status, and funding plan.

Level 3 – Reserve Study Level 3 update with no on-site inspection or property condition assessment. This report is typically requested in the years immediately following a reserve study with an on-site review. A prior reserve study is required to establish the basis for the verification and quantification of the component inventory. Reporting detail is standard and includes component inventory, life and valuation estimates, fund status, and funding plan. No condition assessment or photo inventory will be included in the report.

Our inspection and analysis of the subject property is limited to visual observations and is noninvasive when we conduct Level 1 or Level 2 studies. Level 3 studies do not include a site visit for inspection. We will inspect sloped roofs from the ground. We will inspect flat roofs where safe access where safe access

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(stairs or ladder permanently attached to the structure) is available. The report is based upon a "snapshot in time" at the moment of our observations. Conditions can change between the time of inspection and the issuance of our report. Reserve Study Institute, LLC does not investigate, nor assume, any responsibility for any existence or impact of any hazardous materials, structural, or latent or hidden defects which may not be present on or within the property. Our opinions of estimated costs and remaining useful lives are not a guarantee of the actual costs of replacement, a warranty of the common elements or other property elements, or a guarantee of remaining useful lives. We are not licensed architects or engineers.

Services Available

Traditional Reserve Study

A Traditional Reserve Study is a comprehensive financial analysis conducted for a property that is for internal, budgetary purposes only. This study assesses the association's long-term capital needs by evaluating the condition and estimated useful life of various physical components, such as roofs, pavements, common areas, and building systems. The goal is to create a detailed reserve plan that outlines anticipated future repair and replacement costs, ensuring that adequate funds are set aside over time to cover these expenses.

Reporting Method

The Association will have the option to select from either a pooled (cash flow) method of reporting and/or a straight-line (component) method of reporting. The Association or its representative must prepare the allocations on a straight-line method in accordance with our components. We will not assist the Association with that process as it requires significant judgment. The Associations' reserve accounts will almost always differ from the reserve components identified in the reserve study. Therefore, we do not guarantee to correspond our study report to the Association's accounting records. **The pooled method of funding will be used unless the straight-line method is requested in writing at the time proposal acceptance is received.**

Your Responsibility

You agree to provide us with access to the subject property during our on-site visual inspection and tour. The Association, management, and/or the Board are responsible for assigning an appropriate individual as our primary point of contact to coordinate the reserve study and to provide to us to the best of their ability and if reasonably available, historical and budgetary information, the governing documents, and other information that we request and deem necessary to complete our Study. You agree to pay reasonable attorneys' fees and any other costs incurred in the event we have to initiate litigation to collect any unpaid balance for our services. Management and the Board may be required to sign a representation letter that acknowledges the review and approval of the report.

Assumptions and Indemnification

We assume, without independent verification, the accuracy of all data provided to us. You agree to indemnify and hold us harmless against and from any and all losses, claims, actions, damages, expenses,

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liabilities, including reasonable attorney's fees, to which we may become subject in connection with this engagement, because of any false, misleading, or incomplete information that we have relied upon as supplied by you or others under your direction, or which may result from any improper use or reliance on the report by you or third parties under your control or direction. Your obligation for indemnification reimbursement and reimbursement shall extend to any controlling person of Reserve Study Institute, LLC, including any director, officer, employee, affiliate, or agent. Liability of Reserve Study Institute, LLC and its employees, affiliates, and agents for errors and omissions, if any, in this work is limited to the amount of its compensation for the work performed in this engagement. We are not licensed architects or engineers.

Report

Reserve Study Institute, LLC will complete the services in accordance with this Proposal based on your selection of Service Level and Reporting Detail. We will consider any additional information made available to us in the interest of promptly issuing a Final Report. However, the Report represents a valid opinion of our findings and recommendations and is deemed complete after we receive the signed management representation letter. We retain the right to withhold the Draft Report or Final Report if payment for services is not rendered in a timely manner.

Retention and Propriety of Work Papers

All files, work papers, or documents developed (the "work papers") by us during the course of the engagement is proprietary and remain our property. In all cases, we will retain our work papers for a period of three (3) years.

Restricted Use of Our Report

The use of our Report is limited to only the purpose stated herein. Any use or reliance for any other purpose, by you or third parties, is invalid. Our Reserve Study Report, in whole or part, is not and cannot be used as a design specification, design engineering services, or an appraisal. You may show our report in its entirety to those third parties who need to review the information contained herein. The Client and other third parties viewing this report should not reference our name or our report, in whole or in part, in any document prepared and/or distributed to third parties without our written consent. This report contains intellectual property developed by Reserve Study Institute, LLC specific to this engagement and cannot be reproduced or distributed to those who conduct reserve studies without the expressed written consent of Reserve Study Institute, LLC.

Client Confidentiality

By entering into his agreement, you grant us the rights and a perpetual license to use, reproduce, display, and distribute your association's name, logo, testimonials, and related information ("Client Information") for various purposes, including but not limited to creating training materials, advertising, promotions, testimonials, software development, and other commercial and non-commercial activities without compensation. However, we will maintain the confidentiality of all conversations, documents provided to us, and the contents of our reports, subject to legal or administrative processes or proceedings. These conditions can only be modified by written documents executed by both parties.

Software Development Disclaimer

Throughout the course of our engagement, you may come into contact with software, applications, or other intellectual property under development by us. It is essential to clarify that our collaboration does not constitute a joint venture, partnership, or any shared ownership in the development process. All rights, including but not limited to copyrights, trademarks, and intellectual property rights, associated

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with the software and related materials remain the sole and exclusive property of Reserve Study Institute, LLC and it's and its affiliates, subsidiaries, successors, assigns, and heirs. Any feedback, suggestions, or ideas provided by you in the course of our collaboration do not grant you any ownership or rights in the developed software. This disclaimer serves to make explicit that the software, its components, and associated intellectual property are proprietary assets and our property, and you shall have no claims or rights to assert ownership, authorship, or any form of intellectual property rights therein. Our collaboration is not intended to create any obligations on our part to share ownership or provide any proprietary rights in the developed software or any other intellectual property we develop.

PROPOSED TIMELINE

This proposal is valid for thirty (30) days from the day it is prepared. Price, timeline, terms, and availability may be subject to change thereafter.

We intend to have our Draft Report to you for review and approval on or around **October 15, 2025**. All documentation requested will need to be provided by the Association's representative to us at least sixty (60) days prior to the date we anticipate having the Draft Report to you. If an onsite visit is necessary, then we require the onsite visit at least sixty (60) days before the date we anticipate having the Draft Report to you. You will be given a period of thirty (30) days from the date of receipt of the initial report to review and provide any edits, comments, or issues to us. In the absence of any response, edits, or issues raised, the report shall be deemed accepted as presented and we reserve the right to issue a final signed copy of the report. All edits, comments, or issues pertaining to the report must be presented in writing in a single email within the specified thirty (30) day review period. We shall not be obligated to consider or address edits submitted in a piecemeal fashion or through multiple, separate communications. This clause ensures that all edits are presented in an organized manner and helps us efficiently process these edits.

Our proposed timeline is based on the anticipated cooperation from your personnel. You agree to indemnify us if we are unable to meet the proposed timeline if you require rescheduling or rescheduling due to inclement weather, transportation issues (such as canceled or delayed flights), or any other issues that are reasonably beyond our control. We will attempt to reschedule any onsite visits, if necessary, and complete our services as soon as reasonably possible. However, you understand that if rescheduling is needed for any reason, we provide no assurance or guarantee of when we will be able to reschedule given that we may have other client commitments. Our Final Report will be issued to you in electronic format only.

Multiple Reports Needed

Our report is designed to yield one (1) reserve contribution for all components included in that report. Unless otherwise noted, this proposal will have one (1) recommended contribution amount for one (1) client. If there are multiple associations, multiple neighborhoods with separate budgets, or some components are not shared equally by all owners, then separate reports will be needed. We will proceed with producing one (1) report as per this proposal unless we receive written authorization via email to proceed at an agreed-upon fee for service for the additional work in the event multiple reports are needed.

Not Engineers or Architects

Reserve Study Institute, LLC is not a licensed architectural or engineering firm and this proposal is not for design, build, construction, or engineering purposes.

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FEES AND BILLING

Billing and Fee for Services and Conditions

The retainer, if any, is due upon acceptance of the proposal for services, and no work will commence until the retainer has been received by Reserve Study Institute, LLC. The Association may be progress billed as work proceeds with payment due immediately upon request as outlined in the fee schedule summary on the signature page of this proposal. Otherwise, the payment of all fees is due when we deliver or try to deliver the receipt of the Draft Report by email.

We do **NOT** charge any out-of-pocket costs for mileage, travel, lodging, or meals for a single trip. However, if a second trip is required through no fault of Reserve Study Institute, LLC, additional charges for travel, lodging, and other associated costs will apply. Mileage will be reimbursed based on IRS-approved mileage rates at the time of travel if a second trip is required. We reserve the right to suspend all work if there is an outstanding balance of more than thirty (30) days from the date of the invoice. Any outstanding balance after thirty (30) days from the date of the invoice will also be subject to an interest charge of 1.5% per month. Any litigation necessary to collect an unpaid balance shall be venued in Duval County of Florida. The Association will be responsible for payment of reasonable attorney fees to Reserve Study Institute, LLC in the event of litigation to collect any unpaid balances and reserves the right to charge the Association any and all fees, including mileage, meals, lodging, and other associated out-of-pocket costs incurred during the first trip in the event collections proceeding are initiated due to a delay in timely payment.

SUMMARY

We look forward to working with your Association on this effort, and should you have any questions regarding our proposal, please contact our office at (904) 568-2839.

Respectfully Submitted,

Reserve Study Institute, LLC

Reserve Study Institute, LLC
Jacksonville, Florida

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Reserve Study Institute, LLC

Acceptance of Proposal

Please select one box below to indicate the service selected:

Fee Schedule for Service Level			
	Traditional Reserve Study		
Service Includes	Level 1	Level 2	Level 3
Full Reserve Study	✓		
Establish Reserve Quantities	✓		
Establish Component List	✓		
Site Visit	✓	✓	
Condition Assessment	✓	✓	
Photo Inventory	✓	✓	
Component Inventory	✓	✓	✓
Life & Value Estimates	✓	✓	✓
Reserve Funding Plan	✓	✓	✓
When Payment Due	Fee for Service		
Retainer Prior to Start	N/A	N/A	N/A
Due Upon Draft Report	$ 6,750	N/A	N/A
Total Fee For Service	$ 6,750	N/A	N/A
Select One to Select Service	☒	☐	☐

NOTE: A Level I/Initial Study is required if no previous study is available.

I have read, understand, and accept the terms of the proposal and acknowledge that I have the authority to legally bind the Association to this agreement. I hereby acknowledge that I understand Reserve Study Institute, LLC is not operating as a licensed engineering or architectural firm.

ASSOCIATION REPRESENTATIVE:

_____ _____

Name **Date**

_____ _____

Signature **Title**

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Only When Ready.

Reserve Study Institute, LLC

Sample Report

Full Reserve Study
For
XYZ Condominium Association, Inc.
City, Florida
August 3, 2020

Report Number: 2022.08.03.654

www.reservestudyinstitute.com | (904) 568-2839

Sample Report

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Sample Report

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Sample Report

REPORT SUMMARY

As a member of the Association's Board of Directors, you are responsible for maintaining common areas of the Association's physical property. This report is intended to assist you in the development of the Association's capital budget for current and future reserve fund contributions. The goal of the study is to assist you in maintaining the Association's reserve above an adequate, but not excessive, threshold during one or more years of significant expenditures.

We present our findings and recommendations in the following report sections:

- **Executive Summary** – Provides a snapshot of the Association's reserve study, highlighting significant findings and conclusions.
- **Physical Analysis –** Includes list of the reserve components, useful life, remaining useful life, and a schedule of items excluded from the study.
- **Financial Analysis –** Includes the percent funded, 30-year reserve expense forecast, and the recommended funding plan.
- **Photographs** – Schedule of photographs of components taken during site visit.
- **Methodology** – Details the process of developing the Reserve Study, which includes descriptions of the methods, materials, and guidelines used preparation of physical and financial analysis of the study.
- **Statement of Limitations and Assumptions** – Describes the limitations and assumptions made when conducting this study and in preparation of this report.
- **Professional Experience –** Contains the professional experience of the individuals who prepared this study.
- **Glossary** – Contains definitions of terms used in the Reserve Study.

Sample Report

Executive Summary

General Information

Association Name: XYZ Condominium Association, Inc. (XYZ Condo)

Location: City, FL

Project Description: Condominium

Type of Study: Level 1 – Reserve Study

Site Visit: July 1, 2020

Number of Units: 431

Project Summary

Funding Strategy Recommended: The Funding Goal of this Reserve Study is to maintain reserve above an adequate, not excessive threshold during years of significant expenditures.

Inflation Rate [1]	*2.52%*
Interest Rate [2]	*0.19%*
Cash Status of the Reserve Fund Balance [3]	*$1,555,510*
Full Funded Balance	*$2,760,038*
Percent Funded	*56%*
Special Assessments	*None*

[1] *Inflation rate is based upon the average annual increase of the Consumer Price Index (CPI) over the last 30-years as published by the US Bureau of Labor Statistics (www.labor.gov)*

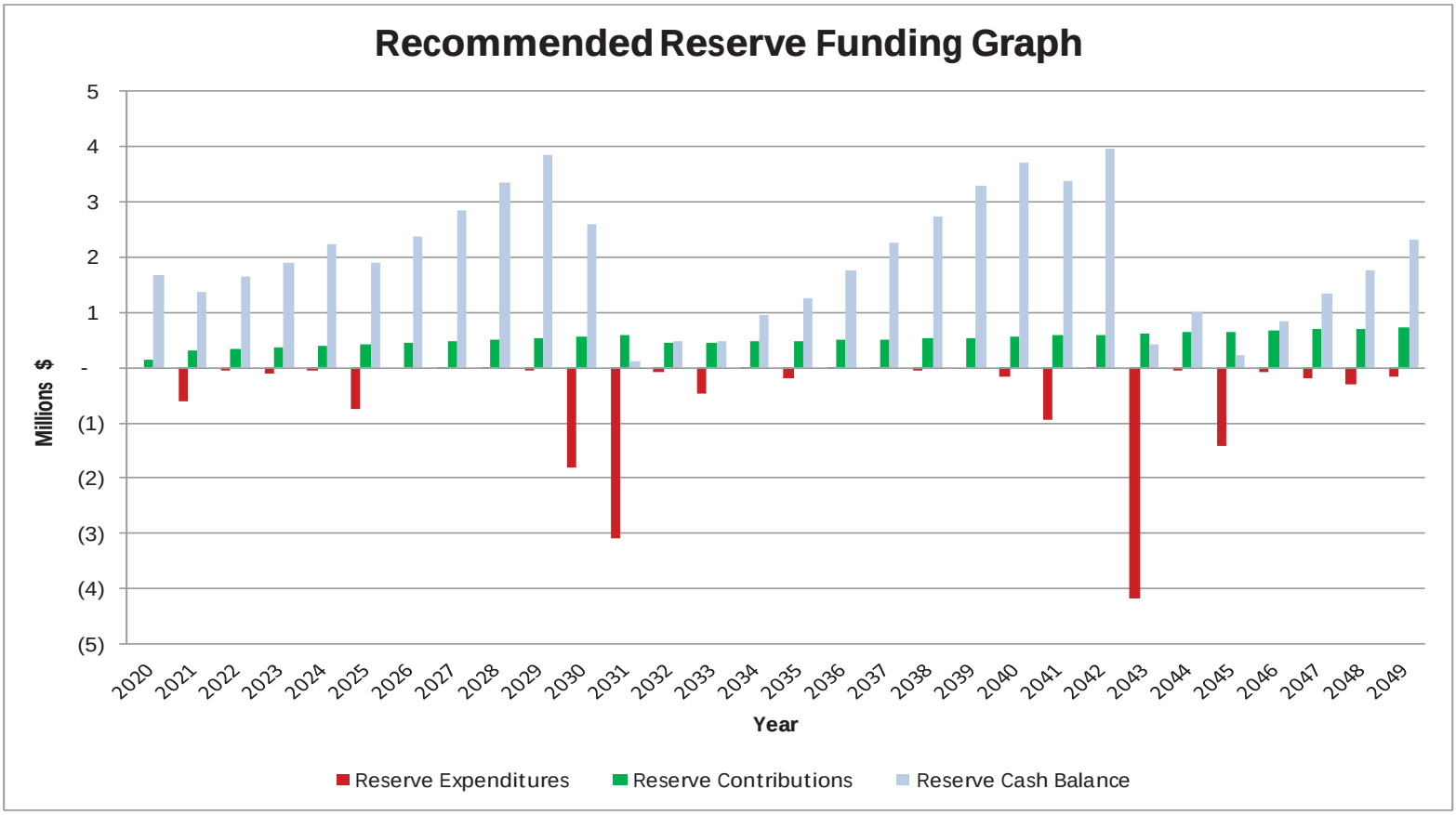
[2] *Interest rate is based on 3-year Treasury Note as published by the U.S. Treasury (www.treasury.gov)*

[3] *Information in relation to the association's finances were supplied by the association's representative and is not audited. Balance as of July 8, 2020.*

Recommended Reserve Funding: The Association budgeted $262,500 for reserve contributions in 2020. We recommend that the Association adopt reserve contributions of $300,000 in 20210 with steady annual increases of $30,000 until 2031 to fund anticipated elevator and painting and waterproofing exterior stucco of buildings in 2030 and 2031, respectively. The Association can then reduce reserve contributions to $445,500 and increase 3% annually thereafter. The Association will have funded the most significant anticipated expenditures related to painting and waterproofing exterior stucco of buildings. The goal of this particular reserve funding plan is to prevent the year end reserve balance from falling below $416,000 during threshold funding years. The recommended year 2021 reserve contribution of $300,000 is equivalent to an average monthly contribution of $58.01 per owner.

Sample Report

Recommended Reserve Funding Table								
Year	Reserve Contributions ($)	Reserve Cash Balance ($)	Year	Reserve Contributions ($)	Reserve Cash Balance ($)	Year	Reserve Contributions ($)	Reserve Cash Balance ($)
2022	131,250	1,689,840	2032	570,000	2,650,644	2042	564,346	3,867,332
2023	300,000	1,378,846	2033	600,000	240,817	2043	581,276	3,548,544
2024	330,000	1,659,589	2034	445,500	604,127	2044	598,715	4,146,275
2025	360,000	1,906,735	2035	458,865	614,048	2045	616,676	782,246
2026	390,000	2,247,237	2036	472,631	1,080,563	2046	635,176	1,367,402
2027	420,000	1,922,382	2037	486,810	1,397,301	2047	654,232	665,563
2028	450,000	2,373,182	2038	501,414	1,895,342	2048	673,859	1,271,307
2029	480,000	2,852,269	2039	516,457	2,402,136	2049	694,074	1,789,808
2030	510,000	3,350,230	2040	531,950	2,886,311	2050	714,897	2,215,702
2031	540,000	3,860,184	2041	547,909	3,440,225	2051	736,344	2,804,298



Respectfully submitted on August 3, 2020 by
RESERVE STUDY INSTITUTE, LLC

Michael H. Russ Jr., Reserve Analyst
Visual Inspection and Report by: Michael H. Russ, Jr.

Sample Report

PHYSICAL ANALYSIS

The Physical Analysis section details the reserve components and also provides information about items excluded from the reason study. Our recommendation is but one scenario, and is not intended to represent the only means of achieving the association's goals. We recommend that the Board of Directors use the following information as a guide in planning for their future objectives.

Identification of Reserve Components

We have segregated classes of property from our review of the information provided by the Association and through conversations with Management and the Board. These classes of property:

- Reserve Components
- Excluded Components
- Repairs and Replacements Funded from Operating Budget
- Property Maintained by Owners
- Property Maintained by Others

Reserve Components

The following table identifies all Reserve Components that meet the criteria to be included in the study that we identified.

Sample Report

RESERVE COMPONENT INVENTORY

Category	Component	Quantity	Unit of Measure	Useful Life	Remaining Useful Life	Unit Cost	Current Cost	Current Fully Funded Balance
Building Elements	Exterior Stucco, Paint and Waterproofing	360,000	Square Feet	10 to 12	11	$6.50	$2,340,000	$195,000
Building Elements	Elevators	18	Each	20 to 30	10	$75,000.00	$1,350,000	$900,000
Building Elements	Carpet	70,000	Square Feet	to 20	1	$8.00	$560,000	$532,000
Building Elements	Roof, Flat	675	Squares	20 to 30	5	$900.00	$607,500	$506,250
Building Elements	Air Conditioner, Roof	3	Each	15 to 20	3	$1,500.00	$4,500	$3,825
Building Elements	Guard Rail, Aluminum	432	Each	30 to 40	13	$750.00	$324,000	$218,700
Building Elements	Backflow Preventor	3	Each	to 25	2	$8,000.00	$24,000	$22,080
Building Elements	Fire Safety Guillotine	9	Each	to 25	1	$1,500.00	$13,500	$12,960
Building Elements	Entry Door, Steel	9	Each	25 to 35	2	$1,000.00	$9,000	$8,486
Building Elements	Pump Station	9	Each	15 to 20	12	$7,000.00	$63,000	$25,200
General Site Elements	Parking Garage, Lattice, Wood and Vinyl	9,000	Square Feet	25 to 30	4	$3.00	$27,000	$23,400
General Site Elements	Security House, Concrete and Stucco	300	Square Feet	50 to 100	25	$100.00	$30,000	$22,500
General Site Elements	Air Conditioner, Security House	1	Each	15 to 20	7	$5,000.00	$5,000	$3,250
General Site Elements	Playground Equipment	1	Each	to 30	18	$15,000.00	$15,000	$6,000
General Site Elements	Floating Dock, Wood	320	Square Feet	to 15	2	$15.00	$4,800	$4,160
General Site Elements	Floating Dock, Platform	1	Each	30 to 40	20	$12,000.00	$12,000	$6,000
General Site Elements	Floating Dock, Ramp, Aluminum	1	Each	to 50	20	$10,000.00	$10,000	$6,000
General Site Elements	Tennis Court, Hard Court	14,400	Square Feet	7 to 10	5	$1.25	$18,000	$9,000
General Site Elements	Tennis Court, Lights	8	Each	15 to 20	3	$1,250.00	$10,000	$8,500
General Site Elements	Fence, Chain Link and Windshield	750	Linear Feet	to 25	4	$29.00	$21,750	$18,270
General Site Elements	Exterior Parking Lights and Light Poles	22	Each	15 to 20	10	$1,800.00	$39,600	$19,800
General Site Elements	Concrete Curbs and Sidewalks, Partial	303	Square Feet	to 65	5	$8.00	$2,424	$2,238
General Site Elements	Asphalt Pavement, Mill and Overlay, Phased	5,833	Square Yard	20 to 25	3	$12.00	$70,000	$61,600
General Site Elements	Asphalt Pavement, Crack Repair, Seal, and Coat	5,833	Square Yard	3 to 5	5	$1.70	$9,917	$0
General Site Elements	Fire Sprinkler Station	1	Each	20 to 30	1	$25,000.00	$25,000	$24,167
General Site Elements	Lift Station	2	Each	15 to 20	9	$15,000.00	$30,000	$16,500
General Site Elements	Signage, Front	2	Each	30 to 50	15	$7,000.00	$14,000	$9,800
General Site Elements	Security Automatic Gate, Aluminum	7	Each	30	20	$6,000.00	$42,000	$14,000
General Site Elements	Security Automatic Gates Motor	3	Each	15 to 25	5	$4,000.00	$12,000	$9,600
General Site Elements	Fencing, Aluminum	800	Linear Feet	30	15	$45.00	$36,000	$18,000
Pool Elements	Pool and Hotub, Re-Marcite	800	Square Feet	15	14	$7.00	$5,600	$373
Pool Elements	Pool Pump and Heater System	1	Each	15 to 20	10	$25,000.00	$25,000	$12,500
Pool Elements	Pool Area, Pavers, Stone, Partial	225	Square Feet	50	5	$10.00	$2,250	$2,025
Pool Elements	Gazebo, Wood	208	Square Feet	15 to 25	5	$50.00	$10,400	$8,320
Pool Elements	Outdoor Kitchen and BBQ, Replacement	1	Each	30	2	$12,000.00	$12,000	$11,200
Pool Elements	Bathrooms	2	Each	30	28	$20,000.00	$40,000	$2,667
Fitness Center Elements	Fitness Equipment	10	Each	15 to 20	15	$3,000.00	$30,000	$7,500
Fitness Center Elements	Air Conditioner	1	Each	15 to 20	8	$5,000.00	$5,000	$3,667
Clubhouse Elements	Kitchen, Replacement	1	Each	30	26	$15,000.00	$15,000	$2,000
Clubhouse Elements	Air Conditioner	1	Each	15 to 20	10	$5,000.00	$5,000	$2,500
Other Elements	Reserve Study Update without Site Visit	1	Allowance	1	1	$1,500.00	$1,500	$0
						TOTALS	$5,881,741	$2,760,038

Sample Report

Excluded Components

Excluded Components do not have predictable Remaining Useful Lives within the scope of this study – i.e., within 30 years. The Board should budget for infrequent repairs for these items from the Operating Fund. We identify the following Excluded Elements as excluded from reserve funding at this time.

- **Concrete Sidewalks, Replacement** – Concrete sidewalks have a useful life expectancy of up to 65 years. Although the replacement costs are not included in this study, we have included periodic repairs and maintenance and made an adjustment for premature failure to be conservative since the costs are significant.

- **Pipes, Subsurface Utilities, Lateral** – Subsurface pipes and other elements have a useful life that is greater than 30 years and is generally unpredictable as to when repairs and replacement will be required.

Repairs and Replacement Funded from Operating Budget

- General Maintenance to the Common Elements
- Expenditures less than $10,000 (except for reserve study expense)
- Landscaping
- Light Fixtures, Interior
- Irrigation Repairs and Maintenance
- Fitness Equipment Repairs and Maintenance
- F.O.B. readers, Repairs and Replacement
- Gazebo Repairs, Partial
- Gazebo Maintenance
- Paint Finishes, Touch Up
- Pipes, Interior Building, Water and Sewer, Manifold
- Pipes, Subsurface Utilities, Laterals, Inspections
- Playground Maintenance
- Pool Maintenance
- Pool Repairs, Partial
- Pool Furniture
- Smoke Detectors and Alarms
- Tree Trimming
- Other Repairs Normally Funded Through the Operating Budget

Property Maintained by Owners

- Windows and Entry Doors
- Interior of Unit
- Air Conditioning Units

Sample Report

Property Maintained by Others

- Boat Slips (Other)
- Water Ways, Lakes, and Canals (Miami-Dade County)

Sample Report

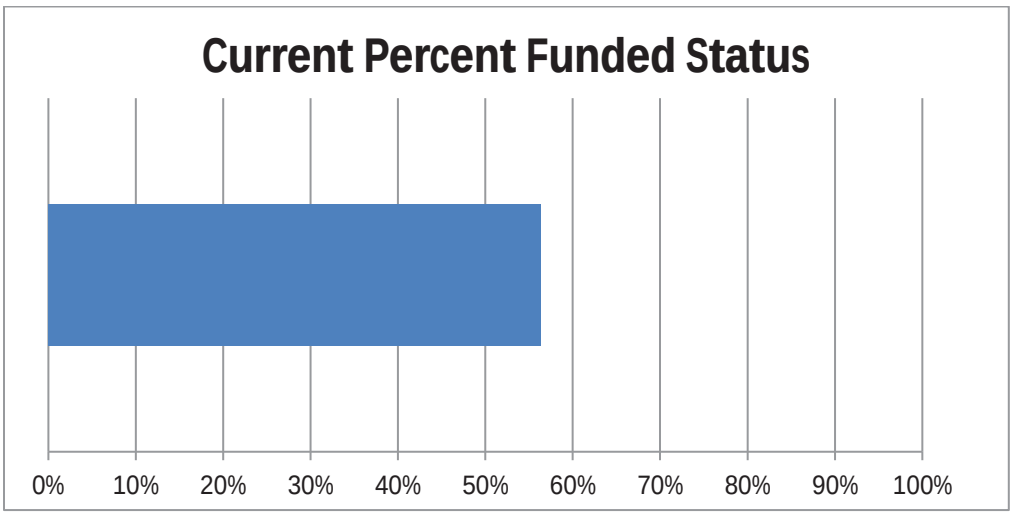
FINANCIAL ANALYSIS

This section of the report is intended to provide the association with the awareness to adequately plan for the ongoing major maintenance, repair and replacement of their common property components. Our recommendation is but one scenario, and is not intended to represent the only means of achieving the association's goals. We recommend that the Board of Directors use the following information as a guide in planning for their future objectives.

Percent Funded

Percent Funded measures the strength of the Reserve Fund at the beginning of each fiscal year. Percent Funded is the industry measure of how well prepared an association is to meet its current and future repair and replacement obligations and how likely the Association is to require a special assessment to fund major repairs and replacements. Percent funding ranges from weak to strong as follows:

- Less than 30% funded is considered weak
- Between 30% and 70% funded is considered fair
- Greater than 70% funded is considered strong
- 100% or more is considered ideal



The Association's Current Percent Funded Status is 56% funded, which indicates that the Association is starting with what is considered a fair level reserve funds. However, we recommend increased budgeted reserve assessments current percent funded is at least 100%.

Reserve Expenditures

		Years 1 - 10									
Category	Component	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029
Building Elements	Exterior Stucco, Paint and Waterproofing	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Building Elements	Elevators	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Building Elements	Carpet	$0	$574,126	$0	$0	$0	$0	$0	$0	$0	$0
Building Elements	Roof, Flat	$0	$0	$0	$0	$0	$688,088	$0	$0	$0	$0
Building Elements	Air Conditioner, Roof	$0	$0	$0	$4,849	$0	$0	$0	$0	$0	$0
Building Elements	Guard Rail, Aluminum	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Building Elements	Backflow Preventor	$0	$0	$25,226	$25,862	$0	$0	$0	$0	$0	$0
Building Elements	Fire Safety Guillotine	$0	$13,841	$0	$0	$0	$0	$0	$0	$0	$0
Building Elements	Entry Door, Steel	$0	$0	$9,460	$0	$0	$0	$0	$0	$0	$0
Building Elements	Pump Station	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
General Site Elements	Parking Garage, Lattice, Wood and Vinyl	$0	$0	$0	$0	$29,829	$0	$0	$0	$0	$0
General Site Elements	Security House, Concrete and Stucco	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
General Site Elements	Air Conditioner, Security House	$0	$0	$0	$0	$0	$0	$0	$5,953	$0	$0
General Site Elements	Playground Equipment	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
General Site Elements	Floating Dock, Wood	$0	$0	$5,045	$0	$0	$0	$0	$0	$0	$0
General Site Elements	Floating Dock, Platform	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
General Site Elements	Floating Dock, Ramp, Aluminum	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
General Site Elements	Tennis Court, Hard Court	$0	$0	$0	$0	$0	$20,388	$0	$0	$0	$0
General Site Elements	Tennis Court, Lights	$0	$0	$0	$10,776	$0	$0	$0	$0	$0	$0
General Site Elements	Fence, Chain Link and Windshield	$0	$0	$0	$0	$24,029	$0	$0	$0	$0	$0
General Site Elements	Exterior Parking Lights and Light Poles	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
General Site Elements	Concrete Curbs and Sidewalks, Partial	$0	$0	$0	$0	$0	$2,746	$0	$0	$0	$0
General Site Elements	Asphalt Pavement, Mill and Overlay, Phased	$0	$0	$0	$75,432	$0	$0	$0	$0	$0	$0
General Site Elements	Asphalt Pavement, Crack Repair, Seal, and Coat	$0	$0	$0	$0	$0	$0	$0	$0	$12,104	$0
General Site Elements	Fire Sprinkler Station	$0	$25,631	$0	$0	$0	$0	$0	$0	$0	$0
General Site Elements	Lift Station	$0	$0	$0	$0	$0	$0	$0	$0	$0	$37,540
General Site Elements	Signage, Front	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
General Site Elements	Security Automatic Gate, Aluminum	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
General Site Elements	Security Automatic Gates Motor	$0	$0	$0	$0	$0	$13,592	$0	$0	$0	$0
General Site Elements	Fencing, Aluminum	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Pool Elements	Pool and Hotub, Re-Marcite	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Pool Elements	Pool Pump and Heater System	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Pool Elements	Pool Area, Pavers, Stone, Partial	$0	$0	$0	$0	$0	$2,548	$0	$0	$0	$0
Pool Elements	Gazebo, Wood	$0	$0	$0	$0	$0	$11,780	$0	$0	$0	$0
Pool Elements	Outdoor Kitchen and BBQ, Replacement	$0	$0	$12,613	$0	$0	$0	$0	$0	$0	$0
Pool Elements	Bathrooms	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Fitness Center Elements	Fitness Equipment	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Fitness Center Elements	Air Conditioner	$0	$0	$0	$0	$0	$0	$0	$0	$6,103	$0
Clubhouse Elements	Kitchen, Replacement	$0	$0	$0	$0	$0	$16,990	$0	$0	$0	$0
Clubhouse Elements	Air Conditioner	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Other Elements	Reserve Study Update without Site Visit	$0	$1,500	$0	$0	$0	$0	$0	$0	$0	$0
	TOTALS	$0	$615,098	$52,344	$116,919	$53,858	$756,132	$0	$5,953	$18,207	$37,540

		Years 11 - 20									
Category	Component	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039
Building Elements	Exterior Stucco, Paint and Waterproofing	$0	$3,077,731	$0	$0	$0	$0	$0	$0	$0	$0
Building Elements	Elevators	$1,731,925	$0	$0	$0	$0	$0	$0	$0	$0	$0
Building Elements	Carpet	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Building Elements	Roof, Flat	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Building Elements	Air Conditioner, Roof	$0	$0	$0	$0	$0	$6,539	$6,704	$6,873	$0	$0
Building Elements	Guard Rail, Aluminum	$0	$0	$0	$447,918	$0	$0	$0	$0	$0	$0
Building Elements	Backflow Preventor	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Building Elements	Fire Safety Guillotine	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Building Elements	Entry Door, Steel	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Building Elements	Pump Station	$0	$0	$84,952	$0	$0	$0	$0	$0	$0	$0
General Site Elements	Parking Garage, Lattice, Wood and Vinyl	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
General Site Elements	Security House, Concrete and Stucco	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
General Site Elements	Air Conditioner, Security House	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
General Site Elements	Playground Equipment	$0	$0	$0	$0	$0	$0	$0	$0	$23,488	$0
General Site Elements	Floating Dock, Wood	$0	$0	$0	$0	$0	$0	$0	$7,331	$0	$0
General Site Elements	Floating Dock, Platform	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
General Site Elements	Floating Dock, Ramp, Aluminum	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
General Site Elements	Tennis Court, Hard Court	$0	$0	$0	$0	$0	$26,156	$0	$0	$0	$0
General Site Elements	Tennis Court, Lights	$0	$0	$0	$0	$0	$0	$0	$0	$15,659	$0
General Site Elements	Fence, Chain Link and Windshield	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
General Site Elements	Exterior Parking Lights and Light Poles	$50,803	$0	$0	$0	$0	$0	$0	$0	$0	$0
General Site Elements	Concrete Curbs and Sidewalks, Partial	$3,110	$0	$0	$0	$0	$3,522	$0	$0	$0	$0
General Site Elements	Asphalt Pavement, Mill and Overlay, Phased	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
General Site Elements	Asphalt Pavement, Crack Repair, Seal, and Coat	$0	$0	$0	$13,709	$0	$0	$0	$0	$15,528	$0
General Site Elements	Fire Sprinkler Station	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
General Site Elements	Lift Station	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
General Site Elements	Signage, Front	$0	$0	$0	$0	$0	$20,343	$0	$0	$0	$0
General Site Elements	Security Automatic Gate, Aluminum	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
General Site Elements	Security Automatic Gates Motor	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
General Site Elements	Fencing, Aluminum	$0	$0	$0	$0	$0	$52,311	$0	$0	$0	$0
Pool Elements	Pool and Hotub, Re-Marcite	$0	$0	$0	$0	$7,937	$0	$0	$0	$0	$0
Pool Elements	Pool Pump and Heater System	$32,073	$0	$0	$0	$0	$0	$0	$0	$0	$0
Pool Elements	Pool Area, Pavers, Stone, Partial	$2,887	$0	$0	$0	$0	$3,269	$0	$0	$0	$0
Pool Elements	Gazebo, Wood	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Pool Elements	Outdoor Kitchen and BBQ, Replacement	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Pool Elements	Bathrooms	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Fitness Center Elements	Fitness Equipment	$0	$0	$0	$0	$0	$43,593	$0	$0	$0	$0
Fitness Center Elements	Air Conditioner	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Clubhouse Elements	Kitchen, Replacement	$0	$0	$0	$0	$0	$21,796	$0	$0	$0	$0
Clubhouse Elements	Air Conditioner	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Other Elements	Reserve Study Update without Site Visit	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
	TOTALS	$1,820,798	$3,077,731	$84,952	$461,627	$7,937	$177,529	$6,704	$14,204	$54,675	$0

		Years 12 - 30									
Category	Component	2040	2041	2042	2043	2044	2045	2046	2047	2048	2049
Building Elements	Exterior Stucco, Paint and Waterproofing	$0	$0	$0	$4,150,162	$0	$0	$0	$0	$0	$0
Building Elements	Elevators	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Building Elements	Carpet	$0	$944,927	$0	$0	$0	$0	$0	$0	$0	$0
Building Elements	Roof, Flat	$0	$0	$0	$0	$0	$1,132,490	$0	$0	$0	$0
Building Elements	Air Conditioner, Roof	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Building Elements	Guard Rail, Aluminum	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Building Elements	Backflow Preventor	$0	$0	$0	$0	$0	$0	$0	$47,026	$48,212	$49,429
Building Elements	Fire Safety Guillotine	$0	$0	$0	$0	$0	$0	$25,801	$0	$0	$0
Building Elements	Entry Door, Steel	$0	$0	$0	$0	$0	$0	$0	$17,635	$0	$0
Building Elements	Pump Station	$0	$0	$0	$0	$0	$0	$0	$123,443	$0	$0
General Site Elements	Parking Garage, Lattice, Wood and Vinyl	$0	$0	$0	$0	$0	$0	$0	$0	$0	$55,607
General Site Elements	Security House, Concrete and Stucco	$0	$0	$0	$0	$0	$55,925	$0	$0	$0	$0
General Site Elements	Air Conditioner, Security House	$0	$0	$8,650	$0	$0	$0	$0	$0	$0	$0
General Site Elements	Playground Equipment	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
General Site Elements	Floating Dock, Wood	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
General Site Elements	Floating Dock, Platform	$19,750	$0	$0	$0	$0	$0	$0	$0	$0	$0
General Site Elements	Floating Dock, Ramp, Aluminum	$16,459	$0	$0	$0	$0	$0	$0	$0	$0	$0
General Site Elements	Tennis Court, Hard Court	$0	$0	$0	$0	$0	$33,555	$0	$0	$0	$0
General Site Elements	Tennis Court, Lights	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
General Site Elements	Fence, Chain Link and Windshield	$0	$0	$0	$0	$0	$0	$0	$0	$0	$44,795
General Site Elements	Exterior Parking Lights and Light Poles	$0	$0	$0	$0	$0	$73,822	$0	$0	$0	$0
General Site Elements	Concrete Curbs and Sidewalks, Partial	$3,990	$0	$0	$0	$0	$4,519	$0	$0	$0	$0
General Site Elements	Asphalt Pavement, Mill and Overlay, Phased	$0	$0	$0	$0	$0	$0	$0	$0	$140,619	$0
General Site Elements	Asphalt Pavement, Crack Repair, Seal, and Coat	$0	$0	$0	$17,588	$0	$0	$0	$0	$19,921	$0
General Site Elements	Fire Sprinkler Station	$0	$0	$0	$0	$0	$46,605	$47,780	$0	$0	$0
General Site Elements	Lift Station	$0	$0	$0	$0	$54,549	$0	$0	$0	$0	$0
General Site Elements	Signage, Front	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
General Site Elements	Security Automatic Gate, Aluminum	$69,126	$0	$0	$0	$0	$0	$0	$0	$0	$0
General Site Elements	Security Automatic Gates Motor	$19,750	$0	$0	$0	$0	$0	$0	$0	$0	$0
General Site Elements	Fencing, Aluminum	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Pool Elements	Pool and Hotub, Re-Marcite	$0	$0	$0	$0	$0	$0	$0	$0	$0	$11,533
Pool Elements	Pool Pump and Heater System	$0	$0	$0	$0	$0	$46,605	$0	$0	$0	$0
Pool Elements	Pool Area, Pavers, Stone, Partial	$3,703	$0	$0	$0	$0	$4,194	$0	$0	$0	$0
Pool Elements	Gazebo, Wood	$17,117	$0	$0	$0	$0	$0	$0	$0	$0	$0
Pool Elements	Outdoor Kitchen and BBQ, Replacement	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Pool Elements	Bathrooms	$0	$0	$0	$0	$0	$0	$0	$0	$80,354	$0
Fitness Center Elements	Fitness Equipment	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Fitness Center Elements	Air Conditioner	$0	$0	$0	$0	$0	$0	$0	$0	$10,044	$0
Clubhouse Elements	Kitchen, Replacement	$0	$0	$0	$0	$0	$27,963	$0	$0	$0	$0
Clubhouse Elements	Air Conditioner	$0	$0	$0	$0	$0	$0	$0	$0	$10,044	$0
Other Elements	Reserve Study Update without Site Visit	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
	TOTALS	$149,895	$944,927	$8,650	$4,167,750	$54,549	$1,425,678	$73,581	$188,104	$309,194	$161,364

Reserve Funding Plan

	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029
Beginning Balance	$1,555,510	$1,689,840	$1,377,653	$1,658,190	$1,904,652	$2,244,732	$1,912,546	$2,363,346	$2,842,334	$3,339,995
Recommended Reserve Contribution	$131,250	$300,000	$330,000	$360,000	$390,000	$420,000	$450,000	$480,000	$510,000	$540,000
Estimated Interest Earned	$3,080	$2,911	$2,881	$3,381	$3,938	$3,946	$800	$4,941	$5,868	$6,823
Special Assessments / Other	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Anticipated Reserve Expenditures	$0	($615,098)	($52,344)	($116,919)	($53,858)	($756,132)	$0	($5,953)	($18,207)	($37,540)
Ending Balance	$1,689,840	$1,377,653	$1,658,190	$1,904,652	$2,244,732	$1,912,546	$2,363,346	$2,842,334	$3,339,995	$3,849,278

	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039
Beginning Balance	$3,849,278	$2,604,605	$129,469	$490,606	$488,774	$954,838	$1,266,227	$1,763,813	$2,269,894	$2,751,935
Recommended Reserve Contribution	$570,000	$600,000	$445,500	$458,865	$472,631	$486,810	$501,414	$516,457	$531,950	$547,909
Estimated Interest Earned	$6,125	$2,595	$589	$930	$1,370	$2,108	$2,876	$3,828	$4,766	$5,749
Special Assessments / Other	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Anticipated Reserve Expenditures	($1,820,798)	($3,077,731)	($84,952)	($461,627)	($7,937)	($177,529)	($6,704)	($14,204)	($54,675)	$0
Ending Balance	$2,604,605	$129,469	$490,606	$488,774	$954,838	$1,266,227	$1,763,813	$2,269,894	$2,751,935	$3,305,593

	2040	2041	2042	2043	2044	2045	2046	2047	2048	2049
Beginning Balance	$3,305,593	$3,726,718	$3,369,802	$3,966,830	$419,919	$1,001,896	$231,620	$832,908	$1,340,942	$1,749,577
Recommended Reserve Contribution	$564,346	$581,276	$598,715	$616,676	$635,176	$654,232	$673,859	$694,074	$714,897	$736,344
Estimated Interest Earned	$6,674	$6,735	$6,963	$4,163	$1,349	$1,171	$1,010	$2,063	$2,933	$3,870
Special Assessments / Other	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Anticipated Reserve Expenditures	($149,895)	($944,927)	($8,650)	($4,167,750)	($54,549)	($1,425,678)	($73,581)	($188,104)	($309,194)	($161,364)
Ending Balance	$3,726,718	$3,369,802	$3,966,830	$419,919	$1,001,896	$231,620	$832,908	$1,340,942	$1,749,577	$2,328,427

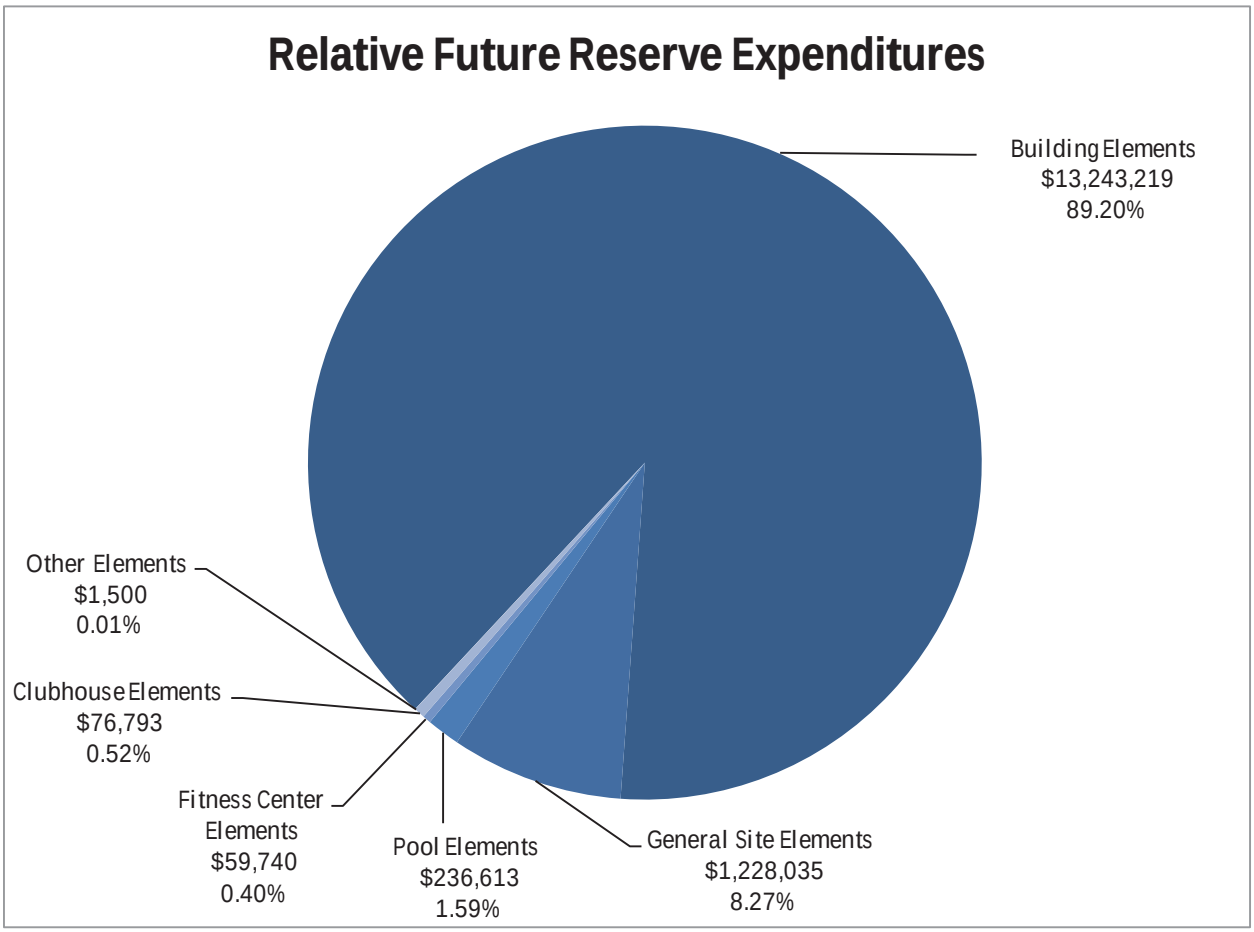
Notes:

(1) Beginning balance of reserve was provided by management and includes reserve fund balances as of July 8, 2020.
(2) Inflation rate of 2.52% and interest rate on Investments of 0.19% were used for this study.
(3) 2020 reserve contribution was budgeted by the Association.
(4) 2043 is threshold funding year due to significant expenditures.

Sample Report

Major Expenditures

The relative cost of total reserve expenses is summarized in the chart below to give the Board perspective on the relative size and importance of key reserve items.



As illustrated above, the Association's largest future expense are general site elements of which $13.2 million is needed to paint and waterproof approximately 360,000 square feet of exterior stucco of buildings and maintain 18 elevators.

The next highest propriety categories are the general site and pool elements, respectively.

The Association may be able to mill and overlay the asphalt pavement prior to replacement. Milling and overlaying asphalt pavement is significantly less expensive than replacement, with approximately the same useful life if the asphalt pavement is maintained properly.

We recommend the Association carefully plan for these expenses and advise us promptly of any changes to the Associations budget plans related to both the timing of these items and cost of these items so that we can incorporate the necessary adjustments into future studies for the Associations to assist the Board in its capital budget process.

Sample Report

Condition Assessment

The following is a condition assessment of certain reserve components:

Building Elements

- **Exterior Stucco, Paint and Waterproofing** – 360,000 square feet of exterior area of property that needs to be painted and kept clean and water-tight to ensure the structural integrity of the property. Very good condition.
- **Elevators** – Each building has a dual elevator system. Routine maintenance being performed. Very good condition.
- **Carpet** – 70,000 square feet in total of all the buildings. Carpet appears to be original. Replacements soon would be expected due to its useful lifespan ending. Poor condition.
- **Roof, Flat –** Approximately 675 Squares of flat roofing in total for the 9 building. Flat roofs hold water and proper maintenance and inspections are required. No leaks at time of inspection.
- **Air Conditioner, Roof** – 9 roof top air conditioning units, phased replacement has started and the last units are in need of replacement as they are at the end of their useful lives. Excellent to poor condition, depending on age.
- **Guard Rail, Aluminum** – Approximately 6,100 linear feet of guard railing on the balconies to ensure the safety of the residence and guest. These are partly covered, which maximizes their useful lives. Inspections and repairs are highly recommended.
- **Backflow Preventor** – Back flow preventors are starting to be phased replacement. Items at the end of their useful loves show signs of rust and damage. Excellent to poor condition, depending on age.
- **Fire Safety Guillotine** – This is a fire safety tool that is located at the trash chutes. This helps prevent a rapid spread of fire by cutting off airflow from ground floor. These show signs of rust and corrosion and may fail a fire safety inspection based on their condition. Poor condition.
- **Entry Door, Steel** – 9 steel case doors located at each trash area are in poor condition due to corrosion at the base of the door and jamb.
- **Pump Station** – Located in each building used to regulate the pressure and raise the water up and into each unit. Repairs and upgrades to this system have been useful in extending the useful life. Pump stations appear well maintained and in very good condition.

General Site Elements

- **Parking Garage, Lattice, Wood and Vinyl** – The lattice divides the enclosed parking garage from the street for security and also appearance. These are starting to rot and break off, expect replacement or failure soon due to this ending its useful life.
- **Security House, Concrete and Stucco** – Security house looks to be in good condition and maintained well. Good condition.
- **Air Conditioner, Security House** – This air conditioner is in fair condition.

Sample Report

- **Playground Equipment** – Playground made from coated steel and plastic molded resin. Good condition.
- **Floating Dock, Wood** – The floating dock wooden deck can be replaced without the need to replace the entire floating dock platform. The wooden decking and rails are in poor condition with partial repairs already started.
- **Floating Dock, Platform** – 20' x 16' floating dock with guard rails. Good condition not appearing to be taking on any water and piers seem to be in good condition as well.
- **Floating Dock, Ramp, Aluminum** – Aluminum ramp used to access the floating dock. Very good condition.
- **Tennis Court, Hard Court** – Both Tennis courts were very well maintained and will extend useful life as a result. Good condition
- **Tennis Court, Lights** – These lights primarily light only the tennis courts and show signs of rust on the poles and would consider replacement in the upcoming years. Good to fair condition.
- **Fence, Chain link and Windshield** – This defines the tennis areas and helps knock the wind down for the players. Deferred maintenance required. Fair condition.
- **Exterior Parking Lights and Light Poles** – These lights help light the parking spaces. Very good condition.
- **Concrete Curbs and Sidewalks, Partial** – Concrete repairs on this property are starting to happen as vegetation growth is starting to break concrete curbs and some areas on the sidewalks as well. These areas were marked where the condition was very poor and failing.
- **Asphalt Pavement, Mill and Overlay, Phased** – The asphalt areas are for the parking spaces not directly located in the concrete parking garage. The asphalt has reached the end of its useful life.
- **Asphalt Pavement, Crack Repair, Seal, and Coat** – This is a maintenance aspect of asphalt to help extend the useful life of the entire asphalt roads and parking spots. Lots of repairs on the asphalt was noticed. Consider mill and overlay soon.
- **Fire Sprinkler Station** – These pump systems supply water in case of a fire inside one of the buildings. One is in need of replacement while the other was replaced recently. Very poor condition on one and excellent condition on the recently replaced unit.
- **Lift Station –** This removes waste water and sewage from the buildings and pumps into the city's sewage system. Was in working order at time of inspection. Good overall.
- **Signage, Front** – Metal signage at the entrance along the concrete walls. Very good condition.
- **Security Automatic Gate, Aluminum** – Gates that open to allow vehicle and person access into and out of the community. Good overall condition.
- **Security Automatic Gates Motor** – These motors open and close the gates at the entry and exit points along the property. All working and in good condition
- **Fencing, Aluminum** – Along the East side of the property and located at one side of the parking garage used to define and secure the property and residence. Average condition.

Sample Report

Pool Elements

- **Pool and Hot Tub, Re-Marcite** – Pool surface that is visible. Very good condition.
- **Pool Pump and Heater System** – These control the water in and out of the pool and also heats the entire system for added comfort. Good condition with little rust or corrosion.
- **Pool Area, Pavers, Stones, Partial** – Stone pavers around most of the common areas around the office, gym, pool, outdoor kitchen, and hot tub. Very good condition.
- **Gazebo, Wood** – This wood gazebo sits above the hot tub area. Fair condition.
- **Outdoor Kitchen and BBQ, Replacement** – This kitchen area was in need of repair or total replacement. Poor condition.
- **Bathrooms** – Bathrooms from off the pool area and also the house keeping area. Good condition.

Fitness Center Elements

- **Fitness Equipment** – The fitness equipment is a total combination of free weights and machines. The machines seemed to be in great condition, the free weights were wrapped up at time of inspection due to COVID-19.
- **Air Conditioner** – Located in the housekeeping and racquet ball areas as well as the gated area out front of the entrance into the community. Average to good condition

Clubhouse Elements

- **Kitchen, Replacement** – Kitchens were just updated in the clubhouse meeting room, housekeeping areas. Very good overall condition.
- **Air Conditioner** – Located in the housekeeping and racquet ball areas as well as the gated area out front of the entrance into the community. Average to good working condition.

Other Elements

- **Reserve Study Update** – Reserve study is a snapshot in time that will require annual updates because factors and assumptions of the study can result in overfunding or underfunding of reserves. These factors include additions or disposals of reserve components, changes in inflation rate, changes in interest rate on investment income, and acceleration or deceleration of capital projects at the discretion of the Board.

Sample Report

PHOTOGRAPHS

ID: 001

Item Description:
Entrance signage

ID: 002

Item Description:
Security House at entrance

ID: 003

Item Description:
Clubhouse meeting room off pool area

Sample Report

ID: 004

Item Description:
Clubhouse with landscaping

Landscaping budgeted from operations.

ID: 005

Item Description:
Pavers at clubhouse

Pavers have a useful life of up to 50 years, excluded from study. Repairs included in operating budget.

ID: 006

Item Description:
Clubhouse kitchen

Sample Report

ID: 007

Item Description:
Electric and plumbing elements of pool and hot tub

ID: 008

Item Description:
Pool filters

ID: 009

Item Description:
Pool and hot tub heaters

Sample Report

ID: 010

Item Description:
Air handlers

ID: 011

Item Description:
Pool pump

Notes:
Good condition

ID: 012

Item Description:
Condensers on south side of clubhouse

Sample Report

ID: 013

Item Description:
Pool at clubhouse

ID: 014

Item Description:
Pavers at pool

Pavers have a useful life of up to 50 years, excluded from study. Repairs included in operating budget.

ID: 015

Item Description:
Outdoor kitchen and seating area

Note:
Damage to granite counter tops noted.

Sample Report

ID: 016

Item Description:
Playground

ID: 017

Item Description:
Bathrooms at pool area

ID: 018

Item Description:
Fire safety pump house

Concrete foundation has a useful life of up to 65 years, excluded from study.

Sample Report

ID: 019

Item Description:
Asphalt street

Notes:
Noted cracking and defects forming in asphalt and concrete curbs.

ID: 020

Item Description:
Second Fire safety pump house

Notes:
Rust has begun to set in and this pump system is reaching the end of its useful life.

ID: 021

Item Description:
Clean water pump station

Notes:
Used to create water pressure for each building.

Sample Report

ID: 022

Item Description:
Gazebo over hot tub area

ID: 023

Item Description:
New roof top air conditioner

.

ID: 024

Item Description:
Old roof top air conditioner

Sample Report

ID: 025

Item Description:
Concrete parking garage

.

ID: 026

Item Description:
Tennis courts with fence and windscreen

ID: 027

Item Description:
Fitness equipment

Sample Report

ID: 028

Item Description:
Parking garage lattice

ID: 029

Item Description:
Floating dock

ID: 030

Item Description:
Back flow preventor

Sample Report

ID: 031

Item Description:
Lift Station

ID: 032

Item Description:
Fire safety guillotine

ID: 033

Item Description:
Carpet hallways

Sample Report

ID: 034

Item Description:
Aluminum access ramp to floating dock platform

ID: 035

Item Description:
Elevators for each building

.

ID: 036

Item Description:
Building Exterior

Sample Report

ID: 037

Item Description:
Building exterior

ID: 038

Item Description:
Tennis court lights

Note:
Rust has begun to set in on this lighting system and reaching the end of its useful life.

ID: 039

Item Description:
Flat roof on each building

Note:
Flat roofs tend to hold water and require more attention than sloped roofs

Sample Report

ID: 040

Item Description:
Kitchen in housekeeping area

Note:
Newly renovated

ID: 041

Item Description:
Exterior with light pole

Sample Report

METHODOLOGY

This Reserve Study has been prepared to provide guidance to the Board of Directors to adequately prepare the Association to meet financial obligations with major maintenance, repair, and replacement of common element components. These financial obligations are best met through periodic contributions gradually instead of raising large sums of money through alternative means.

The Association can fund repairs and replacements in any combination of the following:

- Increases in the operating budget during years when the shortages occur
- Loans using borrowed capital for major replacements projects
- Level monthly reserve assessments annually adjusted upward for inflation to increase reserves to fund the expected major future replacements
- Special assessments

We do not advocate special assessments or loans unless near term circumstances dictate otherwise. Although loans provide a gradual method of funding a replacement, the costs are higher than if the Association were to accumulate reserves ahead of the actual replacement. Interest earnings on reserves also accumulate in this process of saving or reserving for future replacements, thereby defraying the amount of gradual reserve collections. We advocate the third method of level monthly reserve assessments with relatively minor annual adjustments for the following reasons:

- Ensuring an equitable funding plan such that owners pay their “fair share” of the weathering and aging of the commonly owned property each year
- Level reserve assessments preserve the property
- Preservation of the market value of owners’ properties
- Compliance with governing documents, statutes, mortgages, and the like
- Reduction (but not elimination) of risk of need for loans or special assessments

A reserve study is composed of two parts: the physical analysis and financial analysis. The physical analysis is a result of the onsite visit in which a visual observation of the property is conducted to collect data and review of data specific to the property’s reserve components, common areas, and limited common areas. Through this site visit and the use of source materials, we have quantified and established the reserve component inventory and assessed the physical condition of the Association’s reserve components. This information from the physical analysis is used to estimate the timing and cost of future anticipated expenses.

The financial analysis evaluates the condition of the Association’s reserve fund in relation to its income and anticipated expenses. To adequately forecast these expenditures over the 30-year projection period, current costs, projected inflation, and interest rates must be established. Recommendations are

Sample Report

then provided to establish a reserve fund that addresses anticipated expenses, without having to resort to special assessments.

These standards require a Reserve Component to have a "predictable remaining Useful Life." Estimating Remaining Useful Lives and Reserve Expenditures beyond 30 years is often indeterminate. Long-Lived Property Elements are necessarily excluded from this analysis. We consider the following factors in our analysis.

- The Cash Flow Method to compute, project, and illustrate the 30-year Reserve Funding Plan.
- Local costs of materials, equipment, and labor.
- Current and future costs of replacement for the Reserve Components.
- Costs of demolition as part of the cost of replacement.
- Local economic conditions and a historic perspective to arrive at our estimate of long-term future inflation for construction costs in Jacksonville, Florida at an annual inflation rate of 1.8%. Isolated or regional markets of greater construction (development) activity may experience slightly greater rates of inflation for both construction materials and labor.
- The past and current maintenance practices of the Association and their effects on remaining useful lives.
- The Funding Plan excludes necessary operating budget expenditures. It is our understanding that future operating budgets will provide for the ongoing normal maintenance of Reserve Components.

Physical Analysis

The Physical Analysis is the foundation of this Reserve Study, and the methods we used to conduct the Physical Analysis are outlined below.

Identification of Reserve Components

We identified major classes of property and then identified common elements that are likely to require capital repair or replacement for inclusion in the Financial Analysis. We identified reserve components from the Association's Declaration and reviewed information provided to us and from conversations with Association's management and the Board. We identified the following classes of property:

1) **Reserve Components** – Reserve components are elements that meet the Component Criteria in this section and are included in the Reserve Funding Plan of this study.

2) **Excluded Property Components** – These elements are the responsibility of the Association but are excluded from the study because they may require infrequent repairs and replacements, have unpredictable useful lives, or have useful lives that are greater than the scope of this study.

Sample Report

The Association budget for the repairs and replacements of these items from the operating budget.

3) **Operating Budget Funded Repairs and Replacements** – Operating budget provides funds for the repair and replacement of some items that meet the criteria of a Reserve Component but the Board has indicated will be funded from operations. These items are excluded from the Reserve Funding Plan of this study. If the Board elects to fund these items through the reserve budget, then we should be notified to include in a future study.

4) **Property Maintained by Owners** – Certain items have been designated as being the responsibility of the owners are excluded from the Reserve Funding Plan of this study

5) **Property Maintained by Others** – Certain items that are the responsibility of other entities (ex., municipalities and local governments) are excluded from the Reserve Funding Plan of this Study.

The Board should conduct an annual review of these classes of property to confirm its policy concerning the manner of funding from reserves or from the operating budget.

Site Visit

A site visit is conducted to assess the general condition of the property and its common areas. The onsite observation is visual in nature; no invasive or destructive testing is conducted. Sloped roofs, if any, are inspected from the ground for the safety or our personnel. Observations are recorded using a representative sampling of the Association's common areas and reserve components. The component inventory and associated field measurements are also substantiated as part of the site visit.

Component Criteria

The components assessed in this study must meet four criteria to be included:

1. The components must be the responsibility of the Association for repair and maintenance

2. Replacement cost above a minimum threshold

3. The component must have a limited and predictable useful life

4. The useful life of the component must be within the projection period (i.e., not more than 30 years)

Damage to components associated with settlement, fire, earthquakes, flooding, extreme weather, other natural disasters and events, and misuse is not considered predictable or measurable, and are thus not included or allowed for in this study.

Determining Useful Life

The useful life of a reserve component relates to the number of years it is expected to last assuming reasonable care and maintenance. The prediction of reserve and building component life can be

Sample Report

considered no more than an informed estimate based upon information made available at the time of preparation of this report. The useful life is estimated based on information from various sources which include:

- Historical data and information provided by the Association
- Consultation with management groups and construction industry professionals
- Manufacturer recommendations and industry guidelines
- Published service life data
- Manufacturers' and suppliers' data

Determining Remaining Useful Life

The remaining useful life of a reserve component relates to the number of years it is anticipated to be functional or useful. The remaining useful life is estimated based on information from various sources which include:

- Age or years in service
- Physical condition
- Frequency and quality of care and maintenance
- Environmental and weather affects
- Design and quality of materials used

In addition to deterioration or anticipated failure of components, the remaining useful lives may be impacted by obsolesces. The accuracy of the estimate is contingent upon reliable information made available at the time of the report's development. It is important to note that even with the highest degree of diligence and experience, outcomes will vary, and no guarantee can be given as to the timing or service life of the reserve components. All service life assessments in this report are based on the assumption that installation is carried out in accordance with manufacturer's recommendations and installation instructions, together with industry standards of workmanship. Consideration is given to visible design and signs of improper installation of components that will have an impact upon the anticipated service life of the component

Maintenance Assumptions

The Board has some flexibility in choosing to pay for repairs and replacements from the operating or reserve funds. For items the Association has elected to pay from the operating fund as represented by the Association's management, we have excluded these items from this study.

Financial Analysis

The Financial Analysis is based on the information gathered during the Physical Analysis and represents the long-term capital funding plan the Board can use to determine the level of reserve assessments for the Association. The methods we used to conduct the Financial Analysis are outlined below.

Determining Replacement Costs

Determining the replacement costs of components is accomplished in several ways which include:

Sample Report

- Consulting with local vendors, manufacturers, and contractors
- Comparisons can also be made to other associations of similar size and geographic location
- Using can collaborative efforts by construction industry professionals

Once the current repair or replacement cost of each asset is estimated, it must be adjusted for future costs. Future costs include inflation and account for some market variability, and represent the anticipated cost of the asset at the end of its useful life when it is scheduled for repair or replacement.

Inflation Rate

The effect of inflation on the cost of reserve components is a key factor in the financial projections. We have used the 30-year average annual increase in the Consumer Price Index (CPI) as published by the U.S. Bureau of Labor Statistics. This rate reflects a realistic appreciation of future costs for reserve components and assists the Association in adequately budgeting for increasing cost.

Interest Rate

The interest rate used in this report is formulated on a conservative rate of return based on the rate of return of three-year U.S. Treasury bill. We offer no guarantee or opinion in relation to investment decisions made by the Association or the rate of return achieved.

Current Reserve Balance

The analysis, recommendations, and financial projections made within this report are heavily reliant on information provided by the Association and its representatives. The starting reserve fund balance (current or projected) and member contribution totals are supplied by these sources. This information has not been audited nor have the financial projections or recommendations.

Percent Funded

Percent funded is calculated by dividing the Association's current reserve fund balance by the fully funded balance. The percent funded measures how well prepared an Association is to meet its current and future repair and replacement obligations. Percent funded highlights the strength of the association's reserve account in relation to the anticipated costs of repair and replacement.

Recommended Funding Plan

We recommend a funding plan that maintains reserve above an adequate, though not excess threshold during years of significant expenditures. We recommend regular reserve fund contributions and gradual increasing reserving over time to fund expenses for future repairs and replacements whenever possible. Sometimes we adjust reserve assessments up or down to account for items that include, but are not limited to, catching up reserves that are not fully funded or to prepare the Association adequately from one or more years of significant expenses. The reserve funding recommendation is designed to distribute the anticipated costs of maintaining common property components equitable to all owners over the 30-year projection period to the extent reasonable possible.

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STATEMENT OF LIMITATIONS AND ASSUMPTIONS

As a guideline for establishing and spending reserves, we assumed that the Reserve Study will be regularly updated to account for the Association's changing physical, financial, technological, and regulatory conditions. As such, this report is valid at the date shown and Reserve Study Institute, LLC, cannot be held responsible for subsequent changes including, but not limited to, physical, chemical, economic, technological, or regulatory conditions over which we have no control.

This Reserve Study is based on non-invasive visual observation of the Association's property. No invasive or destructive testing, or testing of materials was conducted during the inspections, or at any other time during the preparation of this report. Accordingly, we do not opine on, nor are we responsible for, the structure integrity of the property including its conformity to specific governmental code requirements, such as fire, building and safety, earthquake, and occupancy, or any physical defects that were not readily apparent during the inspection. Also, it is assumed that all building and ancillary components have been designed and constructed properly and that life cycles will approximate normal industry performance standards. Reserve Study Institute, LLC shall not be responsible for accurate determination of remaining life expectancies of components that may have been improperly designed and constructed. Our opinions of the remaining useful lives of the property elements do not represent a guarantee or warranty of performance of the products, materials, and workmanship.

Cost estimates used represent a preliminary opinion only and are neither a quote nor a warranty of actual costs that may be incurred. These estimates are based on typical cost data that may not fully characterize the scope of the underlying property conditions. It should be anticipated that actual cost outcomes will be impacted by varying physical and economic conditions, maintenance practices, changes in technology, and future regulatory actions.

The projected values and recommendations included in this study are strictly estimated representations of true values. The more distant the year, the lower the probability the values are accurate. The model is sensitive to initial expenses – especially when inflated over 30 years – thus, depending on the economic climate, the recommended reserve assessments may need to be increased or decreased.

We did not make any soil analysis or geological study with this report; nor were any water, oil, gas, coal, or other subsurface mineral and use rights or conditions investigated. Substances such as asbestos, urea-formaldehyde, other chemicals, toxic wastes, environmental mold or other potentially hazardous materials, if present, adversely affect the validity of this study. Our opinions are predicated on the assumption that there are no hazardous materials on or in the property. We assume no responsibility for any such conditions. We are not qualified to detect such substances, quantify the impact, or develop the remedial cost.

We make no representation or warranty, expressed or implied, with respect to the contents of this report or any part thereof and cannot accept any legal responsibility or liability for any inaccuracies, errors or omissions contained in this report or any part thereof. Our best professional judgment has

Sample Report

been used, however certain facts forming the basis of this report are subject to professional interpretation and differing conclusions could be reached.

We have relied on the Association's management and the Board of Directors to disclose pertinent financial status of the Association. Assumptions regarding interest earned and inflation have been made according to the current financial trends and rates. Component and material quantities were determined by observation during the site visit.

This reserve study should be reviewed carefully as it may not include, nor are our methods designed to include, all common and limited common element components that will require major maintenance, repair, or replacement in future years, and may not include regular contributions to a reserve account for the cost of such maintenance, repair, or replacement. We have relied on the Association's management and/or the Board of Directors to disclose to us any and all reserve components or assets that are the responsibility of the Association to maintain during the onsite visit. The failure to include a component, may, under some circumstances, require the Board to levy a special assessment for owners' shares of common expenses for the cost of major maintenance, repair, or replacement of a reserve component.

We assume, without independent verification, the accuracy of all data provided to us. We performed no procedures to detect false, misleading, or incomplete information, or violations of any rules, regulations, or laws.

Restricted Use of Our Report – This report is intended for use by the Association's management and the Board of Directors and is limited to only the purpose stated herein. Any use or reliance for any other purpose, by the Association's management, the Board of Directors, or third parties, is invalid. The Association's management and Board of Directors, or any other third parties viewing this report, should not reference our name or our report, in whole or in part, in any document prepared and/or distributed to third parties. This report contains intellectual property developed by Reserve Study Institute, LLC specific to this engagement and cannot be reproduced or distributed to those who conduct reserve studies without the expressed written consent of Reserve Study Institute, LLC.

Client Confidentiality – We will maintain the confidentiality of all conversations, documents provided to us, and the contents of our reports, subject to legal or administrative process or proceedings, though we reserve the right to include the Association's name in our client lists.

Sample Report

PROFESSIONAL EXPERIENCE

MICHAEL H. RUSS, JR.
Reserve Analyst

Michael H. Russ a reserve analyst at the Reserve Study Institute, LLC. He is responsible for preparing both the physical analysis and financial analysis of Reserve Studies. Mr. Russ is also responsible for inspection and analysis of the condition of clients' properties and recommending solutions to prolong the lives of the components. He also forecasts capital expenditures for the repairs or replacement of the property components and prepares technical reports on assignments for condominiums, townhomes, homeowners' associations, other associations, and properties.

Professional Experience

Before founding Reserve Study Institute, LLC, Mr. Russ founded Florida Construction Industries, a construction firm based in Jacksonville, Florida. Mr. Russ also served as a financial Advisor for National Financial Services where he conducted examined financial projections, conducted cash flow analysis, evaluated various investment alternatives considering risk and inflation, also managed employee benefits for high-net-worth individuals and corporate clients.

The following highlights some of his professional experience:

- Stone House Kitchens Consultant and Project Manager
- Florida Construction Industries Founder
- Advisor at National Financial Services Group
- Property Manager
- Advisor at National Financial Brokerage
- Former Home Inspector
- Volunteer CFO at Limbitless, Inc., A Non-Profit Organization

Education
Florida State College, Jacksonville, FL

Professional Affiliations/Designations
215 Licenses for Annuities, Life Insurance and Health Insurance
ADA Americans with Disabilities Act Certified
NEFBA Certified North East Florida Builders Association

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GLOSSARY

Cash Flow Method – A method of calculating Reserve contributions to the reserve fund designed to offset the variable annual expenditures from the reserve fund. Difference Reserve Funding Plans are tested against the anticipated schedule of reserve expenses until the desired funding goal is achieved.

Component – Also referred to as an "Asset." Individual line items in the Reserve Study developed or updated in the physical analysis. Components typically meet four requirements: 1) Association's responsibility, 2) limited useful lives, 3) predictable useful lives, and 4) above a minimum threshold cost.

Component Inventory – The task of selecting and quantifying reserve components, which can be accomplished through on-site visual observations, review of Association design and organizational documents, a review of established association precedents, and discussion with appropriate Association representatives.

Component Method – A method of developing a Reserve Funding Plan with the total contributions is based on the sum of the contributions for individual components.

Current Cost of Replacement – The amount required today derived from the quantity of a Reserve Component and its unit cost to replace or repair a Reserve Component using the most current technology and construction materials, duplicating the productive utility of the existing property at current local market prices for materials, labor, and manufactured equipment, contractors' overhead, profit, and fees, but without provisions for building permits, overtime, bonuses for labor or premiums for material and equipment. We include removal and disposal costs where applicable.

Deficit – An actual or projected reserve balance that is less than the fully funded balance.

Effective Age – The difference between Useful Life (UL) and Remaining Useful Life (RUL)

Financial Analysis – The portion of the Reserve Study where current status of the reserves (measured as cash or percent funded) and a recommended reserve contribution rate (reserve funding plan) are derived, and the projected reserve income and expenses over time is presented.
.
Fully Funded Balances – The Reserve balance that is in direct proportion to the fraction of life "used up" of the current Repair or Replacement costs similar to Total Accrued Depreciation.

Funding Goal (Threshold) – The stated purpose of this Reserve Study is to determine the adequate, not excessive, minimal threshold reserve balances.

Future Costs of Replacement – Reserve Expenditure derived from the inflated current cost of replacement or current cost of replacement as defined above, with consideration given to the effects of inflation on local market rates for materials, labor, and equipment.

Long-Lived Property Component – Property component of the Association responsibility not likely to require capital repair or replacement during the next 30 years with an unpredictable remaining Useful Life beyond the next 30 years.

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Percent Funded – The ratio, at a particular point of time (typically the beginning of the Fiscal Year), of the actual (or projected) Reserve Balance to the Fully Funded Balance, expressed as a percentage.

Physical Analysis – The portion of the Reserve Study where the component evaluation, condition assessment, and life and valuation estimate tasks are performed.

Remaining Useful Life (RUL) – The estimated remaining functional or useful time in years of a Reserve Component based on its age, condition, and maintenance.

Reserve Balance – Actual or projected funds as of a particular point in time (typically the beginning and ending of the fiscal year) that the Association has identified for use to defray the future repair or replacement of those major components that the Association is obligated to maintain. Reserve balance is also commonly referred to as "reserves," "reserve accounts", or "cash reserves." In this report, the reserve balance is based on information provided by management and is not audited.

Reserve Component – Property elements with: 1) the Association's responsibility; 2) limited Useful Life expectances; 3) predictable Remaining Useful Life expectancies; and 4) a replacement cost above a minimum threshold.

Reserve Component Inventory – Line Items in Reserve Expenditures that identify a Reserve Component.

Reserve Contribution – An amount of money set aside or Reserve Assessment contributed to a Reserve Fund for future Reserve Expenditures to repair or replace Reserve Components.

Reserve Expenditure – Future Cost of Replacement of a Reserve Component.

Reserve Funding Plan – The portion of Reserve Study identify the Cash Flow Analysis and containing the recommended Reserve Contributions and projected annual expenditures, interest earned, and reserve balances.

Reserve Study – A budget planning tool that identifies both the current status of the reserve fund and a stable and equitable Funding Plan designed to offset the anticipated future major common area expenditures. The Reserve Study consists of two parts: 1) Physical Analysis and 2) Financial Analysis.

Special Assessment – An assessment levied on the members of an Association by the Board of Directors in addition to regular assessments.

Surplus – An actual or projected reserve balance that is greater than the fully funded balance.

Useful Life (UL) – The estimated total time, in years, that a Reserve Component is expected to serve its intended function in its present application or installation.

EXHIBIT 8

MINUTES OF WORKSHOP
AVALON GROVES
COMMUNITY DEVELOPMENT DISTRICT

A workshop of the Board of Supervisors of the Avalon Groves Community Development District was held on Thursday, July 10, 2025, at 10:00 a.m., at the Palms at Serenoa Clubhouse, 17244 Bay Cedar Way, Clermont, FL 34714. No decisions were made, nor action taken, on behalf of the CDD at this workshop.

FIRST AGENDA ITEM: Call to Order

Present were

Carl Weston (S1)	Vice Chair, Avalon Groves CDD
John Holden (S2)	Assistant Secretary, Avalon Groves CDD
Gabriel Ruperez (S3)	Assistant Secretary, Avalon Groves CDD
Robert Wolski (S4)	Assistant Secretary, Avalon Groves CDD

SECOND AGENDA ITEM: Selection of Workshop Secretary

Mr. Ruperez was designated as secretary to record the workshop minutes.

THIRD AGENDA ITEM: Audience Comments

Audience comments were heard on meeting length over the previous three years, Supervisor preparation for the meeting, and landscape maintenance and repair of the CDD area behind Alligator Flag Court.

FOURTH AGENDA ITEM: Discussion Items

A. Exhibit 1: Landscape and Environmental – *Gabriel Ruperez/Carl Weston*

1. Exhibit 2: Report Cards

Supervisors discussed vendor performance, discrepancies and inconsistencies in the vendor's performance of the agreed scope, District Management monitoring of the vendor, communications to Supervisors for greater awareness.

B. Amenities and Infrastructure – *John Holden/Gene Mastrangeli*

Supervisors discussed the sun's effect on the playground equipment at Goldcrest Loop and posting warning/play at own risk signs, and ongoing issues regarding damage and dumping in the District's ponds around the apartment complex.

C. Public Safety – *Carl Weston/Robert Wolski*

D. Finance – *Gene Mastrangeli/Robert Wolski*

Supervisors discussed the current financial status, obtaining a reserve study.

E. Other Items

1. Discussion on the Evaluation and Purchase of a Professional Transcription Program *(Holden)*

Supervisors discussed the purchase of a professional transcription program, such as Craft Note, to ensure accurate meeting Minutes and the capturing of materially significant points as well as a portable recording device. This item will be discussed further at the next meeting.

2. Discussion on Constructive Time Management – Board Meetings *(Weston)*

Supervisors discussed time management to reduce the meeting length, noting staying on topic, managing questions effectively, recognizing speakers, and utilizing Robert's Rules of Order as steps to streamline meetings and ensure efficient decision-making. Suggestions included being motion-driven and task-based, having the Chair facilitate the meeting, and reiterating the motion prior to voting to ensure clarity.

FIFTH AGENDA ITEM: Meeting Announcements

The next Avalon Groves Community Development District meeting is scheduled for 6:00 p.m. on July 24, 2025 at Serenoa Club Amenity Center, 17555 Sawgrass Bay Blvd., Clermont, Florida 34714.

The next Avalon Groves Community Development District workshop is scheduled for 10 a.m. on August 14, 2025 at Palms at Serenoa Clubhouse, 17244 Bay Cedar Way, Clermont, Florida 34714.

SIXTH AGENDA ITEM: Adjournment

The workshop was adjourned at

**Each person who decides to appeal any decision made by the Board with respect to any matter considered at a regular meeting is advised that person may need to ensure that a verbatim record of the proceedings is made, including the testimony and evidence upon which such appeal is to be based.*

Workshop minutes were accepted at a meeting by vote of the Board of Supervisors at a publicly noticed meeting held on August 21, 2025.

□ Kyle Darin, Secretary	□ Eugene Mastrangeli, Chair
□ Heath Beckett, Assistant Secretary	□ Carl Weston, Vice Chair

RESOLUTION 2025-13

A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE AVALON GROVES COMMUNITY DEVELOPMENT DISTRICT ADOPTING THE ANNUAL MEETING SCHEDULE FOR FISCAL YEAR 2025-2026; AND PROVIDING FOR AN EFFECTIVE DATE.

WHEREAS, the Avalon Groves Community Development District ("**District**") was established pursuant to the Uniform Community Development District Act of 1980, Chapter 190, *Florida Statutes,* as amended ("**Act**"), and is validly existing under the Constitution and laws of the State of Florida; and

WHEREAS, the District is required by Section 189.015, *Florida Statutes*, to file quarterly, semi-annually, or annually a schedule (including date, time, and location) of its regular meetings with local governing authorities; and

WHEREAS, further, in accordance with the above-referenced statute, the District shall also publish quarterly, semi-annually, or annually the District's regular meeting schedule in a newspaper of general paid circulation in the county in which the District is located; and

WHEREAS, the Board desires to adopt the Fiscal Year 2025-2026 annual meeting schedule attached as **Exhibit A**.

NOW THEREFORE BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE AVALON GROVES COMMUNITY DEVELOPMENT DISTRICT:

SECTION 1. The Fiscal Year 2025-2026 annual meeting schedule attached hereto and incorporated by reference herein as **Exhibit A** is hereby approved and shall be published in accordance with the requirements of Florida law and also provided to applicable governing authorities.

SECTION 2. This Resolution shall become effective immediately upon its adoption.

PASSED AND ADOPTED THIS 21ST DAY OF AUGUST, 2025.

ATTEST:

AVALON GROVES
COMMUNITY DEVELOPMENT DISTRICT

_____ _____

Secretary/Assistant Secretary Chairperson, Board of Supervisors

Exhibit A: Fiscal Year 2025-2026 Annual Meeting Schedule

Exhibit A

BOARD OF SUPERVISORS MEETING DATES
AVALON GROVES
COMMUNITY DEVELOPMENT DISTRICT
FISCAL YEAR 2025-2026

The Board of Supervisors of the Avalon Groves Community Development District will hold their regular meetings for Fiscal Year 2025-2026 at the Serenoa Club Amenity Center, located at 17555 Sawgrass Bay Boulevard, Clermont, Florida 34714, at 10:00 a.m., and their workshops for Fiscal Year 2025-2026 at the Palms at Serenoa Clubhouse, located at 17244 Bay Cedar Way, Clermont, Florida 34714, at 10:00 a.m., unless otherwise indicated as follows:

Regular Meetings	**Workshops**
October 23, 2025	October 9, 2025
November 20, 2025 *(moved due to Thanksgiving)*	November 13, 2025
December 18, 2025 *(moved due to Xmas)*	December 11, 2025
January 22, 2026	January 8, 2026
February 26, 2026	February 12, 2026
March 26, 2026	March 12, 2026
April 23, 2026 (Discuss Budget Needs)	April 9, 2026
May 28, 2026 (Approve Preliminary Budget)	May 14, 2026
June 25, 2026	June 11, 2026
July 23, 2026	July 9, 2026
August 20, 2026 (Adopt Budget) **6 p.m.** *moved due to assessment notification deadline)*	August 13, 2026
September 24, 2026	September 10, 2026

The meetings are open to the public and will be conducted in accordance with the provision of Florida Law for Community Development Districts. The meetings may be continued to a date, time, and place to be specified on the record at the meeting. A copy of the agenda for these meetings may be obtained from Vesta District Services at 250 International Parkway, Suite 208, Lake Mary, Florida 32746, or by calling (321) 263-0132 ("District Office").

There may be occasions when one or more Supervisors or staff will participate by telephone. Pursuant to provisions of the Americans with Disabilities Act, any person requiring special accommodations at this meeting because of a disability or physical impairment should contact the District Office at (407) 723-5900 at least 48 hours prior to the meeting. If you are hearing or speech impaired, please contact the Florida Relay Service by dialing 7-1-1, or 1-800-955-8771 (TTY) / 1-800-955-8770 (Voice), for aid in contacting the District Office.

A person who decides to appeal any decision made at the meeting with respect to any matter considered at the meeting is advised that person will need a record of the proceedings and that accordingly, the person may need to ensure that a verbatim record of the proceedings is made, including the testimony and evidence upon which such appeal is to be based.

District Manager

FY 2026 Meeting Schedule Dates

FIRST					
MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	
October 6, 2025	October 7, 2025	October 1, 2025	October 2, 2025	October 3, 2025	
November 3, 2025	November 4, 2025	November 5, 2025	November 6, 2025	November 7, 2025	Election Day - Nov 4
December 1, 2025	December 2, 2025	December 3, 2025	December 4, 2025	December 5, 2025	
January 5, 2026	January 6, 2026	January 7, 2026	January 1, 2026	January 2, 2026	New Year - Jan 1
February 2, 2026	February 3, 2026	February 4, 2026	February 5, 2026	February 6, 2026	
March 2, 2026	March 3, 2026	March 4, 2026	March 5, 2026	March 6, 2026	
April 6, 2026	April 7, 2026	April 1, 2026	April 2, 2026	April 3, 2026	Good Friday - Apr 3 (Easter - Apr 5)
May 4, 2026	May 5, 2026	May 6, 2026	May 7, 2026	May 1, 2026	
June 1, 2026	June 2, 2026	June 3, 2026	June 4, 2026	June 5, 2026	
July 6, 2026	July 7, 2026	July 1, 2026	July 2, 2026	July 3, 2026	Independence Day - Jul 4
August 3, 2026	August 4, 2026	August 5, 2026	August 6, 2026	August 7, 2026	
September 7, 2026	September 1, 2026	September 2, 2026	September 3, 2026	September 4, 2026	Labor Day - Sep 7 (1st Mon)

SECOND					
MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	
October 13, 2025	October 14, 2025	October 8, 2025	October 9, 2025	October 10, 2025	Columbus/Indigenous Peoples Day - Oct 13 (2nd Mon)
November 10, 2025	November 11, 2025	November 12, 2025	November 13, 2025	November 14, 2025	Veterans Day - Nov 11
December 8, 2025	December 9, 2025	December 10, 2025	December 11, 2025	December 12, 2025	
January 12, 2026	January 13, 2026	January 14, 2026	January 8, 2026	January 9, 2026	
February 9, 2026	February 10, 2026	February 11, 2026	February 12, 2026	February 13, 2026	
March 9, 2026	March 10, 2026	March 11, 2026	March 12, 2026	March 13, 2026	
April 13, 2026	April 14, 2026	April 8, 2026	April 9, 2026	April 10, 2026	
May 11, 2026	May 12, 2026	May 13, 2026	May 14, 2026	May 8, 2026	
June 8, 2026	June 9, 2026	June 10, 2026	June 11, 2026	June 12, 2026	
July 13, 2026	July 14, 2026	July 8, 2026	July 9, 2026	July 10, 2026	
August 10, 2026	August 11, 2026	August 12, 2026	August 13, 2026	August 14, 2026	
September 14, 2026	September 8, 2026	September 9, 2026	September 10, 2026	September 11, 2026	

THIRD					
MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	
October 20, 2025	October 21, 2025	October 15, 2025	October 16, 2025	October 17, 2025	
November 17, 2025	November 18, 2025	November 19, 2025	November 20, 2025	November 21, 2025	
December 15, 2025	December 16, 2025	December 17, 2025	December 18, 2025	December 19, 2025	
January 19, 2026	January 20, 2026	January 21, 2026	January 15, 2026	January 16, 2026	Martin Luther King Jr Day - Jan 19 (3rd Mon)
February 16, 2026	February 17, 2026	February 18, 2026	February 19, 2026	February 20, 2026	President's Day (Vesta holiday) - Feb 16 (3rd Mon)
March 16, 2026	March 17, 2026	March 18, 2026	March 19, 2026	March 20, 2026	
April 20, 2026	April 21, 2026	April 15, 2026	April 16, 2026	April 17, 2026	
May 18, 2026	May 19, 2026	May 20, 2026	May 21, 2026	May 15, 2026	
June 15, 2026	June 16, 2026	June 17, 2026	June 18, 2026	June 19, 2026	Juneteeth Independence Day - Jun 19
July 20, 2026	July 21, 2026	July 15, 2026	July 16, 2026	July 17, 2026	
August 17, 2026	August 18, 2026	August 19, 2026	August 20, 2026	August 21, 2026	
September 21, 2026	September 15, 2026	September 16, 2026	September 17, 2026	September 18, 2026	

FOURTH					
MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	
October 27, 2025	October 28, 2025	October 22, 2025	October 23, 2025	October 24, 2025	
November 24, 2025	November 25, 2025	November 26, 2025	November 27, 2025	November 28, 2025	Thanksgiving - Nov 27 (4th Thur)
December 22, 2025	December 23, 2025	December 24, 2025	December 25, 2025	December 26, 2025	Xmas Eve/Xmas -Dec 24-25
January 26, 2026	January 27, 2026	January 28, 2026	January 22, 2026	January 23, 2026	
February 23, 2026	February 24, 2026	February 25, 2026	February 26, 2026	February 27, 2026	
March 23, 2026	March 24, 2026	March 25, 2026	March 26, 2026	March 27, 2026	
April 27, 2026	April 28, 2026	April 22, 2026	April 23, 2026	April 24, 2026	
May 25, 2026	May 26, 2026	May 27, 2026	May 28, 2026	May 22, 2026	Memorial Day - May 25
June 22, 2026	June 23, 2026	June 24, 2026	June 25, 2026	June 26, 2026	
July 27, 2026	July 28, 2026	July 22, 2026	July 23, 2026	July 24, 2026	
August 24, 2026	August 25, 2026	August 26, 2026	August 27, 2026	August 28, 2026	
September 28, 2026	September 22, 2026	September 23, 2026	September 24, 2026	September 25, 2026	

LAST					
MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	
October 27, 2025	October 28, 2025	October 29, 2025	October 30, 2025	October 31, 2025	Halloween - Oct 31
November 24, 2025	November 25, 2025	November 26, 2025	November 27, 2025	November 28, 2025	Thanksgiving - Nov 27
December 29, 2025	December 30, 2025	December 31, 2025	December 25, 2025	December 26, 2025	Xmas - Dec 24-25 / New Yrs Eve - Dec 31
January 26, 2026	January 27, 2026	January 28, 2026	January 29, 2026	January 30, 2026	
February 23, 2026	February 24, 2026	February 25, 2026	February 26, 2026	February 27, 2026	
March 30, 2026	March 31, 2026	March 25, 2026	March 26, 2026	March 27, 2026	
April 27, 2026	April 28, 2026	April 29, 2026	April 30, 2026	April 24, 2026	
May 25, 2026	May 26, 2026	May 27, 2026	May 28, 2026	May 29, 2026	Memorial Day - May 25
June 29, 2026	June 30, 2026	June 24, 2026	June 25, 2026	June 26, 2026	
July 27, 2026	July 28, 2026	July 29, 2026	July 30, 2026	July 31, 2026	
August 31, 2026	August 25, 2026	August 26, 2026	August 27, 2026	August 28, 2026	
September 28, 2026	September 29, 2026	September 30, 2026	September 24, 2026	September 25, 2026	

CALENDAR REMINDERS

- November (Even Year) General Elections - New Supervisors assume office 2nd Tuesday after General Election
- April Budget Discussion (Review contracts, reserve study and capital improvement projects. Request proposals for proposed projects)
- May Budget Discussion (Workshop) and Approve Preliminary (high water) Budget (before June 15 deadline to send to County & 60 days prior to adoption)
- July Set Next Year's Meeting Schedule Dates
- July/August Budget/Assessment Public Hearings & Adopt Budget (before August 31 - Property Appraiser deadline to certify assessment roll)

EXHIBIT 9

MINUTES OF WORKSHOP
AVALON GROVES
COMMUNITY DEVELOPMENT DISTRICT

A workshop of the Board of Supervisors of the Avalon Groves Community Development District was held on Thursday, July 10, 2025, at 10:00 a.m., at the Palms at Serenoa Clubhouse, 17244 Bay Cedar Way, Clermont, FL 34714. No decisions were made, nor action taken, on behalf of the CDD at this workshop.

FIRST AGENDA ITEM: Call to Order

Present were

Carl Weston (S1)	Vice Chair, Avalon Groves CDD
John Holden (S2)	Assistant Secretary, Avalon Groves CDD
Gabriel Ruperez (S3)	Assistant Secretary, Avalon Groves CDD
Robert Wolski (S4)	Assistant Secretary, Avalon Groves CDD

SECOND AGENDA ITEM: Selection of Workshop Secretary

Mr. Ruperez was designated as secretary to record the workshop minutes.

THIRD AGENDA ITEM: Audience Comments

Audience comments were heard on meeting length over the previous three years, Supervisor preparation for the meeting, and landscape maintenance and repair of the CDD area behind Alligator Flag Court.

FOURTH AGENDA ITEM: Discussion Items

A. Exhibit 1: Landscape and Environmental – *Gabriel Ruperez/Carl Weston*

1. Exhibit 2: Report Cards

Supervisors discussed vendor performance, discrepancies and inconsistencies in the vendor's performance of the agreed scope, District Management monitoring of the vendor, communications to Supervisors for greater awareness.

B. Amenities and Infrastructure – *John Holden/Gene Mastrangeli*

Supervisors discussed the sun's effect on the playground equipment at Goldcrest Loop and posting warning/play at own risk signs, and ongoing issues regarding damage and dumping in the District's ponds around the apartment complex.

C. Public Safety – *Carl Weston/Robert Wolski*

D. Finance – *Gene Mastrangeli/Robert Wolski*

Supervisors discussed the current financial status, obtaining a reserve study.

E. Other Items

1. Discussion on the Evaluation and Purchase of a Professional Transcription Program *(Holden)*

Supervisors discussed the purchase of a professional transcription program, such as Craft Note, to ensure accurate meeting Minutes and the capturing of materially significant points as well as a portable recording device. This item will be discussed further at the next meeting.

2. Discussion on Constructive Time Management – Board Meetings *(Weston)*

Supervisors discussed time management to reduce the meeting length, noting staying on topic, managing questions effectively, recognizing speakers, and utilizing Robert's Rules of Order as steps to streamline meetings and ensure efficient decision-making. Suggestions included being motion-driven and task-based, having the Chair facilitate the meeting, and reiterating the motion prior to voting to ensure clarity.

FIFTH AGENDA ITEM: Meeting Announcements

The next Avalon Groves Community Development District meeting is scheduled for 6:00 p.m. on July 24, 2025 at Serenoa Club Amenity Center, 17555 Sawgrass Bay Blvd., Clermont, Florida 34714.

The next Avalon Groves Community Development District workshop is scheduled for 10 a.m. on August 14, 2025 at Palms at Serenoa Clubhouse, 17244 Bay Cedar Way, Clermont, Florida 34714.

SIXTH AGENDA ITEM: Adjournment

The workshop was adjourned at

**Each person who decides to appeal any decision made by the Board with respect to any matter considered at a regular meeting is advised that person may need to ensure that a verbatim record of the proceedings is made, including the testimony and evidence upon which such appeal is to be based.*

Workshop minutes were accepted at a meeting by vote of the Board of Supervisors at a publicly noticed meeting held on August 21, 2025.

□ Kyle Darin, Secretary	□ Eugene Mastrangeli, Chair
□ Heath Beckett, Assistant Secretary	□ Carl Weston, Vice Chair

EXHIBIT 10

MINUTES OF MEETING
AVALON GROVES
COMMUNITY DEVELOPMENT DISTRICT

The Regular Meeting of the Board of Supervisors of the Avalon Groves Community Development District was held on Thursday, July 24, 2025 at 7:00 p.m., at the Serenoa Club Amenity Center, 17555 Sawgrass Bay Blvd., Clermont, Florida 34714. The actions taken are summarized as follows:

FIRST ORDER OF BUSINESS: Roll Call

Mr. Beckett called the meeting to order and conducted roll call.

Present and constituting a quorum were:

Carl Weston (S1)	Board Supervisor, Vice Chair
John Holden (S2)	Board Supervisor, Assistant Secretary
Gabriel Ruperez (S3)	Board Supervisor, Assistant Secretary
Robert Wolski (S4)	Board Supervisor, Assistant Secretary
Eugene Mastrangeli (S5)	Board Supervisor, Chair

Also present were:

Kyle Darin	District Manager, Vesta District Services
Heath Beckett	District Manager, Vesta District Services
Michael Bush	Field Manager, Vesta District Services *(Virtually)*
Bennett Davenport	District Counsel, Kutak Rock LLP *(Virtually)*
Greg Woodcock	District Engineer, Stantec *(Virtually)*
Justin Sarka	Account Manager, Down to Earth Landscape & Irrigation *(Virtually)*
Bismark Quiles	Irrigation Manager, Down to Earth Landscape & Irrigation *(Virtually)*

SECOND ORDER OF BUSINESS: Audience Comments – Agenda Items *(Limited to 3 minutes per individual for agenda items)*

A comment was heard on the landscape maintenance at Alligator Court.

THIRD ORDER OF BUSINESS: FY 2025-2026 Budget

A. **FY 2025-2026 Budget/Assessment Public Hearing**

1. Open Public Hearing

On a MOTION by Mr. Weston, SECONDED by Mr. Wolski, WITH ALL IN FAVOR, the Board approved opening the FY 2025-2026 Budget/Assessment Public Hearing, for Avalon Groves Community Development District.

2. Exhibit 1: Presentation of FY 2026 Budget

Mr. Beckett advised that no changes were made since the budget workshop and no assessment increases were proposed for Fiscal Year 2026. He also explained the two parts of the assessment – Operations and Maintenance (set by the Board) and Debt Service (unchanged for the duration of the Bond). He and Mr. Davenport responded to a questions

regarding refinancing of the bonds and Trustee Fees. If the opportunity arises to refinance the bonds, staff will present that information for the Board's consideration.

3. Public Comments

There being none, the next item followed.

4. Close Public Hearing

On a MOTION by Mr. Weston, SECONDED by Mr. Wolski, WITH ALL IN FAVOR, the Board approved closing the FY 2025-2026 Budget/Assessment Public Hearing, for Avalon Groves Community Development District.

B. Exhibit 2: Consideration and Adoption of **Resolution 2025-11, Adopting FY 2025-2026 Budget**

On a MOTION by Mr. Wolski, SECONDED by Mr. Mastrangeli, WITH ALL IN FAVOR, the Board adopted **Resolution 2025-11, Adopting FY 2025-2026 Budget**, for Avalon Groves Community Development District.

C. Exhibit 3: Consideration and Adoption of **Resolution 2025-12, Providing for the Collection and Enforcement of Special Assessments for FY 2025-2026**

Mr. Beckett advised this just allows for the collection of assessments to fund the adopted budget. The verbiage is the same year over year.

On a MOTION by Mr. Weston, SECONDED by Mr. Ruperez, WITH ALL IN FAVOR, the Board adopted **Resolution 2025-12, Providing for the Collection and Enforcement of Special Assessments for FY 2025-2026**, for Avalon Groves Community Development District.

FOURTH ORDER OF BUSINESS: Staff & Vendor Reports

A. Community Managers

1. Palms at Serenoa HOA Update – *Shannon Bernard/John Holden*

No updates were provided by the Palms at Serenoa HOA.

2. Serenoa POA Update – *David Landry/Gene Mastrangeli*

It was confirmed that the landscape request for the Village 3 pedestrian gate had been addressed.

B. Exhibit 4: Aquatic Maintenance Report – *Steadfast Environmental*

1. Review of 6/19/2025 – 7/17/2025 Pond Requests

Questions were raised regarding the treatment reports and responses to pond maintenance requests. Mr. Beckett requested Mr. Holden email his questions and concerns so they can be presented to the vendor.

A request was made for Steadfast to call in to the next meeting to explain the treatment processes and provide educational materials on what residents can expect to see after an application.

C. Exhibit 5: Landscape Maintenance Report – *Justin Sarka, Down To Earth*

A question was asked regarding whether mowing between the homes and conservation area in the Palms at Serenoa was according to the scope. Mr. Beckett requested Supervisors inform him of requests and concerns as they see them rather than waiting for the meeting to relay requests, so they can be addressed in a more timely manner and research can be completed to provide an informed response.

1. Review of 6/19/2025 – 7/17/2025 Landscape Requests

2. Exhibit 6: Consideration of Down To Earth Proposal #123489 to Brace 15 Palm Trees at the End of Sawgrass Bay Blvd - $1,433.75

This item was initially skipped and discussed after IV.C.4. Consideration of Down To Earth Irrigation Proposals - $8,590.15

Mr. Beckett provided information on the proposal and that this may be part of the punch list for the roundabout turnover. Mr. Davenport provided an update on the amendment to the interlocal agreement that provides for satisfactory condition of the landscape prior to turnover. He requested the Board approve a not-to-exceed amount of $1,433.75 so he can present it to Lake County to address.

Mr. Sarka added that the single irrigation break and clogged nozzles previously noted in his report were included in the scope for proposal #123489.

On a MOTION by Mr. Wolski, SECONDED by Mr. Ruperez, WITH ALL IN FAVOR, the Board delegated to the Chair the authority to approve a proposal for the bracing of the Palm trees at the end of Sawgrass Bay Blvd with associated irrigation repairs in an amount not to exceed $1,433.75, for Avalon Groves Community Development District.

In response to a question on a previous action item, Mr. Sarka advised that the four removed palm trees appear to have been planted correctly but they may have become infected with a pathogen.

3. Walk-on Exhibit A: Consideration of Down To Earth Mulch Proposals

   a. Option 1: #124261 Hybrid (All Beds, inc. "Blown in") - $47,950.00

   b. Option 2:

      i. #124267 Phase 1 (Sawgrass Bay Beds) - $23,070.00

      ii. #124269 Phase 2 (Remaining Beds) - $21,000.00

Mr. Sarka discussed the scope of the mulch proposals. The refresh would bring the mulch to a 2" depth. Phase 1 would encompass beds on Sawgrass Bay Blvd from Edgemont to the Roundabout – both sides of the right of way and the medians.

In response to a question on raised drip line, Mr. Sarka asked for specific locations so they can be re-stapled. He acknowledged that the playground is a common area for raised lines due to patrons

kicking them up. Once the mulch is in place it will help hold it down.

Supervisors discussed the costs and alternate projects that could be funded. It was noted that the mulch will help with weed control.

Mr. Sarka explained that exposed dripline does not always equate with elevated dripline, but during the monthly inspections and during mulch installations any elevated dripline is re-stapled. He reiterated that anywhere there is foot traffic, it's anticipated that dripline will frequently be exposed.

On a MOTION by Mr. Ruperez, SECONDED by Mr. Weston, OPPOSED by Mr. Holden, the Board approved Down To Earth proposal #124267 to install mulch in the Sawgrass Bay Blvd. beds (Phase 1) in the amount of $23,070.00, for Avalon Groves Community Development District.

Supervisors discussed scheduling the Phase 2 mulch proposal closer to the start of the next fiscal year so invoicing will be dated on or after October 1.

On a MOTION by Mr. Weston, SECONDED by Mr. Ruperez, OPPOSED by Mr. Holden, the Board approved Down To Earth proposal #124269 to install mulch in the remaining beds (Phase 2), contingent upon an installation date that will allow for invoicing after the start of the next fiscal year, in the amount of $21,000.00, for Avalon Groves Community Development District.

4. Walk-on Exhibit B: Consideration of Down To Earth Irrigation Proposals - $8,590.15

a. #124298 Install Missing Sod Irrigation Zone - $5,000.00

b. #124316 Install Missing Center Island Decoders - $3,590.15

Mr. Quiles explained the scope of work for the proposals and responded to Supervisor questions. When the road was expanded, the irrigation was reinstalled but some components were missing. Mr. Davenport advised that documentation would be needed to substantiate assignment of damage to the responsible party. Mr. Sarka provided further information in response to Supervisor questions.

Supervisors considered the need for these items to be completed in order for the irrigation to work properly, and that future road expansions should not affect this area.

On a MOTION by Mr. Ruperez, SECONDED by Mr. Holden, WITH ALL IN FAVOR, the Board approved Down To Earth irrigation proposals #124298 and #124316 in the amount of $8,590.15, for Avalon Groves Community Development District.

The amendment to add the roundabout area to the maintenance contract will be presented at the next meeting.

D. District Engineer – *Greg Woodcock, Stantec*

1. Update on Edgemont Punch List Fulfillment

Mr. Woodcock will review the completed punch list items when he is on site tomorrow. He will review the Edgemont fence while he is on site.

2. Update on SWFWMD Permit for Depositing Reclaimed Water in CDD Ponds

Mr. Woodcock has reviewed permits and did not see any permits. He explained that the stormwater pipes were jetted and a lot of silt and organic material removed so the stormwater system in that area of the Palms at Serenoa should be flowing correctly now. He added that there are regulations regarding pumping reclaimed water into a stormwater pond, and he will review pond 18 when he is on site. Supervisors requested Mr. Woodcock reach out to Sunshine Water to discuss the matter to ensure proper permits are acquired in the future.

3. Update on Village 3 Landscape Maintenance Requirements

Mr. Woodcock has been working with the environmental group to verify the existing plantings are permitted. A response from them is anticipated for the next meeting.

The irrigation system in Village 3 was discussed. The irrigation plans associated with that area were not available from Lake County. At this point irrigation is not needed, and irrigation as-builts are not always required by the County.

Mr. Woodcock provided an update on an HOA matter.

E. District Counsel – *Bennett Davenport, Kutak Rock*

1. Discussion on Sawgrass Bay Blvd Landscape and Irrigation Construction Damages

2. Update on Sawgrass Bay Blvd Roundabout Punch List

Mr. Davenport advised that no corroborating evidence was available to support the assertion that the County's construction crew caused additional irrigation damages in the area.

Supervisors discussed being more proactive for future construction projects.

F. District Manager – *Kyle Darin/Heath Beckett, Vesta District Services*

1. Update on Request for Reserve Study Proposals

Mr. Beckett advised that three proposals will be presented at the next meeting.

2. Discussion on CDD Newsletter

Mr. Beckett requested a one paragraph summary from the liaisons be forwarded to the administrator for incorporation into the CDD newsletter.

Discussion followed regarding the meeting schedule for the next fiscal year. Board consensus was to stay with daytime meetings except for the budget adoption meeting.

A question was raised regarding document retention.

G. Exhibit 7: Field Manager – *Michael Bush, Vesta District Services*

1. Review of 6/19/2025 – 7/17/2025 Field Requests

Mr. Bush reviewed the Field Manager Report he advised of dirt being dumped on CDD property in village 3 for pool installations. The solar outlet pole capacity was discussed. Staff will request this information prior to execution of the lease agreement. The disparate functioning of streetlights, outstanding repairs, poor responses to submitted service ticket, and vendor monitoring of lights were discussed.

Staff will schedule a meeting with the vendor to discuss the deficiencies. Mr. Mastrangeli requested to participate in that conversation.

Mr. Beckett will reach out to Mr. Woodcock regarding the Sawgrass Bay Blvd. turn lane into Edgemont which is retaining water.

Monument repairs and refurbishment were discussed. Mr. Mastrangeli and Mr. Bush will discuss this item and bring a recommendation back to the Board.

FIFTH ORDER OF BUSINESS: Consent Agenda

A. Exhibit 8: Consideration and Approval of the Minutes of the Board of Supervisors Regular Meeting Held June 26, 2025

B. ~~Exhibit 9: Consideration and Acceptance of the Minutes of the Board of Supervisors Workshop Held July 10, 2025~~ – *Moved to Next Meeting*

C. Exhibit 10: Consideration and Acceptance of the Unaudited June 2025 Financial Statements

On a MOTION by Mr. Wolski, SECONDED by Mr. Ruperez, WITH ALL IN FAVOR, the Board approved items A and C of the Consent Agenda, for Avalon Groves Community Development District.

SIXTH ORDER OF BUSINESS: Liaison Reports

A. Landscape and Environmental – *Gabriel Ruperez/Carl Weston*

1. Exhibit 11: Landscape Scoresheets

Mr. Weston commented on the consistency of scoring. He relayed that the Paragon Lane cul-de-sac landscape has a slope greater than 45° which requires manual maintenance rather than mowing. The scoresheets will be submitted twice a month. Mr. Beckett noted weed pressure at the Edgemont entrance which he will relay to Mr. Sarka.

B. Amenities and Infrastructure – *John Holden/Gene Mastrangeli*

1. Exhibit 12: Presentation of Goldcrest Loop Playground Drinking Fountain Report

Mr. Bush has repaired the drinking fountain auto-stop.

Supervisors requested a determination on maintenance responsibility for the sidewalks.

C. Public Safety – *Carl Weston/Robert Wolski*

Mr. Wolski advised that a meeting was scheduled for August 19, 2025.

D. Finance – *Gene Mastrangeli/Robert Wolski*

Mr. Wolski advised the District is well under budget with only two months left in the fiscal year.

SEVENTH ORDER OF BUSINESS: Supervisor Requests *(Includes Next Meeting Agenda Item Requests)*

A. Discussion on Purchase of Professional Transcription Program for Meeting Minutes *(Holden)*

Mr. Holden ask Supervisors to consider a professional transcription program to provide a verbatim transcription. Voice Memos, an iPhone app, was discussed.

Mr. Davenport advised that summary Minutes are permitted and advised caution as he discussed some issues with AI tools and the potential for errors in transcriptions that may impact District records in the future.

Mr. Ruperez volunteered to take Workshop Minutes going forward.

B. Next Workshop Agenda Items

- Pond maintenance
- The way the website is designed and items on the web site.

C. Next Meeting Agenda Items

- Review outstanding MACH forms prior to meetings – some do not have resolution dates. It was requested to view MACH forms for the last 90 days
- Discussion on Hog Trapping – split with HOA and POA

EIGHTH ORDER OF BUSINESS: Audience Comments – New Business *(Limited to 3 minutes per individual for non-agenda items)*

There being none, the next item followed.

NINTH ORDER OF BUSINESS: Next Workshop Attendance Check

The next Avalon Groves Community Development District workshop is scheduled for 10 a.m. on August 14, 2025 at Palms at Serenoa Clubhouse, 17244 Bay Cedar Way, Clermont, Florida 34714.

Supervisors affirmed their intent to attend the workshop.

TENTH ORDER OF BUSINESS: Next Meeting Quorum Check

The next Avalon Groves Community Development District meeting is scheduled for 10 a.m. on August 21, 2025 at Serenoa Club Amenity Center, 17555 Sawgrass Bay Blvd., Clermont, Florida 34714.

Supervisors affirmed their intent to attend the next regular meeting in person.

ELEVENTH ORDER OF BUSINESS: Exhibit 13: Action Items Summary

District Manager

- Change the meeting on August 21st to 10am start
- Contact leasing agent for commercial site regarding landscape maintenance. If they are not responsive, complain to Lake County
- Present FY 2026 meetings schedule with only the budget public hearing meeting as the only evening meeting
- Review outstanding MACH forms prior to meetings – Supervisors requested historical report – back 90 days - for how long it is takes for MACH form requests to be completed.

Field Manager

- Submit a ticket to Lake County about sidewalks

District Counsel

- Look into contract with lighting vendor to see if there is a clause for responding to repair requests

District Engineer

- Review turning lane into Palms as it floods

Steadfast

- Attend the next meeting, provide material for residents

TWELFTH ORDER OF BUSINESS: Adjournment

On a MOTION by Mr. Ruperez, SECONDED by Mr. Weston, WITH ALL IN FAVOR, the Board adjourned the meeting at 8:25 p.m., for Avalon Groves Community Development District.

**Each person who decides to appeal any decision made by the Board with respect to any matter considered at the meeting is advised that person may need to ensure that a verbatim record of the proceedings is made, including the testimony and evidence upon which such appeal is to be based.*

Meeting minutes were approved at a meeting by vote of the Board of Supervisors at a publicly noticed meeting held on August 21, 2025.

□ Kyle Darin, Secretary	□ Eugene Mastrangeli, Chair
□ Heath Beckett, Assistant Secretary	□ Carl Weston, Vice Chair

EXHIBIT 11

Avalon Groves CDD
Summary for July 2025

At the end of July there was spendable cash in the amount of $614,621. This cash balance is net of items, such as, accounts payable and any monies due to others. There are no assessments outstanding which means that 100% of assessments have been collected by the tax collector and forwarded to the District.

By the end of July, 83.33% of the annual budget is "expected" to be expended. Expenses through the month of July amount to $923,196 which is 69.80% of the budget for the fiscal year. This means the District is under budget through July.

The largest expenditures are for physical environment at $513,452. This category covers maintenance of lakes and ponds; landscaping; repairs and maintenance; porter services; and wildlife removal. The second largest category of expenditures is utilities amounting to $257,380 which encompass electric; streetlights; and water.

Although the total expenses only take up 69.80% of the budget there are several items that are either overbudget or have expended more than the 83.33% of the budget already this year.

The Disclosure Report had a budget of $5,408 but actually cost $6,408 this works out to be 119% of the budget

Bank fees are currently 178% of the allocated budget due to the purchase of check stock.

Miscellaneous expenses are also overbudget at 429% of budgeted amount due to Fire District taxes imposed on

The other expense overbudget is Hardscape Repair & Maintenance, which was budgeted at $15,000 but has already incurred $22,477 worth of expenses, that works out to be 150% of the budget for that expense.

Lastly, Lake & Pond Maintenance has a budget of $54,600 and the District spent $61,325, 112.32% of the budget.

Avalon Groves
Financial Summary
July 31, 2025

Cash & Asset Re-cap

	General Fund	DS 2017	DS 2017A-1	DS 2019	DS 2021 Ph 3-4	DS 2021	DS 2022
Cash Balance	$ 668,146						
Trust Balances (Restricted to DS)		266,876	814,638	281,671	78,810	280,559	82,091
Trust Balances (Restricted to A&C)		0	1	14,894	5	84,303	10,251
Less: Accounts Payable	1,617	-	-	-	-	-	-
Less: Due to Other Funds	51,908	-	-	-	-	-	-
Net Cash Balance	$ 614,621	$ 266,877	$ 814,639	$ 296,565	$ 78,814	$ 364,862	$ 92,342
Plus: Prepaids & Deposits	7,541	-	-	-	-	-	-
Plus: Assessments Receivable	-	-	-	-	-	-	-
Plus: Due from Other Funds	-	5,744	16,880	7,090	6,511	11,344	4,339
Less: Deferred Revenue	-	-	-	-	-	-	-
Net Current Assets	622,162	272,621	831,519	303,655	85,326	376,205	96,681
Cash Available to Spend	614,621						

Analysis of Revenues & Expenditures

	General Fund	DS 2017	DS 2017A-1	DS 2019	DS 2021 Ph 3-4	DS 2021	DS 2022
Revenues:	**1,321,676**	**179,497**	**528,966**	**219,456**	**195,786**	**348,546**	**131,752**
Expenses:							
Administrative	99,470						
Insurance	31,836						
Debt Service Administration	21,058						
Utilities	257,380						
Physical Environment	513,452						
Principal Payments		50,000	155,000	75,000	80,000	135,000	40,000
DS Interest		122,669	376,441	133,404	112,738	202,450	89,275
Total Expenses:	**923,196**	**172,669**	**531,441**	**208,404**	**192,738**	**337,450**	**129,275**
Transfers In/Out	-	-	(20,822)	(60,000)	-	80,822	-
Profit (Loss)	**$ 398,479**	**$ 6,828**	**$ (23,297)**	**$ (48,948)**	**$ 3,049**	**$ 91,918**	**$ 2,477**

Avalon Groves
Community Development District

Financial Statements
(Unaudited)

July 31, 2025

CELEBRATING 30 YEARS OF SERVICE
TO OUR COMMUNITIES
1995-2025

Avalon Groves CDD
Balance Sheet
July 31, 2025

		General Fund	Debt Service 2017	Debt Service 2017 A-1	Debt Service 2019	Debt Service 2021 Ph 3/4	Debt Service 2021	Debt Service 2022	TOTAL
1	**ASSETS**								
2	Operating Account	$ 668,146	$ -	$ -	$ -	$ -	$ -	$ -	668,146
3	Trust Accounts:								
4	Revenue Fund	-	65,668	219,055	158,102	57,892	94,842	49,434	644,993
5	Interest Fund	-	43	132	15,085	1,303	14,846	16	31,425
6	Reserve Fund	-	201,115	595,238	106,788	19,584	170,588	32,625	1,125,938
7	Prepayment Fund	-	18	124	1,581	-	248	-	1,972
8	Sinking Fund	-	32	90	22	30	34	17	225
9	Principal	-	-	-	40	-	-	-	40
10	Cost Of Issuance	-	-	-	-	-	-	(1)	(1)
11	Bond Redemption	-	-	-	52	-	0	-	52
12	Acquisition & Construction	-	0	1	14,894	5	84,303	10,251	109,455
13	Accounts Receivable	-	-	-	-	-	-	-	-
14	On-Roll Assessments Receivable	-	-	-	-	-	-	-	-
15	Due From Other Funds	-	5,744	16,880	7,090	6,511	11,344	4,339	51,908
16	Undeposited Funds	-	-	-	-	-	-	-	-
17	Prepaid Expenses	7,000	-	-	-	-	-	-	7,000
18	Deposits	541	-	-	-	-	-	-	541
19	**TOTAL ASSETS**	**675,687**	**272,621**	**831,519**	**303,655**	**85,326**	**376,205**	**96,681**	**2,641,695**
20	**LIABILITIES**								
21	Accounts Payable	1,617	-	-	-	-	-	-	1,617
22	On-Roll Deferred Revenue	-	-	-	-	-	-	-	-
23	Accrued Expenses	-	-	-	-	-	-	-	-
24	Due To Other Funds	51,908	-	-	-	-	-	-	51,908
25	**TOTAL LIABILITIES**	**53,525**	**-**	**-**	**-**	**-**	**-**	**-**	**53,525**
26	**FUND BALANCE**								
27	Nonspendable								
28	Prepaid & Deposits	541	-	-	-	-	-	-	541
29	Capital Reserves	-	-	-	-	-	-	-	-
30	Operating Capital	220,425	-	-	-	-	-	-	220,425
31	Unassigned	401,196	272,621	831,519	303,655	85,326	376,205	96,681	2,367,203
32	**TOTAL FUND BALANCE**	**622,162**	**272,621**	**831,519**	**303,655**	**85,326**	**376,205**	**96,681**	**2,588,169**
33	**TOTAL LIABILITIES & FUND BALANCE**	**675,687**	**272,621**	**831,519**	**303,655**	**85,326**	**376,205**	**96,681**	**2,641,695**

Avalon Groves CDD
General Fund
Statement of Revenue, Expenditures, and Change in Fund Balance
For the period from October 1, 2024 to July 31, 2025

		FY 2025 Adopted Budget	FY 2025 Month of July	FY 2025 Actual Year-to-Date	VARIANCE Over (Under) to Budget	% Actual YTD / FY Budget
1	**REVENUES**					
2	Special Assessment	$ 1,319,762	$ -	$ 1,321,676	$ 1,914	100%
3	Serenoa POA Cost Share Agreement	2,790	-	-	(2,790)	0%
4	Interest Income	-	-	-	-	0%
5	Misc. Revenue	-	-	-	-	0%
6	**TOTAL REVENUES**	**$ 1,322,552**	**$ -**	**$ 1,321,676**	**$ (876)**	**100.15%**
7	**EXPENDITURES**					
8	**GENERAL ADMINISTRATIVE**					
9	Supervisor Compensation	$ 12,000	$ 1,000	$ 8,400	$ (3,600)	70%
10	District Management Services	34,608	2,884	28,840	(5,768)	83%
11	Bank Fees	150	-	267	117	178%
12	Auditing	3,800	-	3,250	(550)	86%
13	Regulatory and Permit Fees	175	-	175	-	100%
14	Legal Advertisements	4,000	-	1,339	(2,661)	33%
15	Engineering Services	40,000	4,559	23,036	(16,965)	58%
16	Legal Services	60,000	2,808	25,951	(34,049)	43%
17	Technology & Website Admin.	2,015	-	1,785	(230)	89%
18	Miscellaneous (Appraisal, Mailing, Etc.)	1,500	-	6,428	4,928	429%
19	**TOTAL GENERAL ADMINISTRATIVE**	**158,248**	**11,250**	**99,470**	**(58,778)**	**62.86%**
20	**INSURANCE**					
21	Insurance	35,000	-	31,836	(3,164)	91%
22	**TOTAL INSURANCE**	**35,000**	**-**	**31,836**	**(3,164)**	**90.96%**
23	**DEBT SERVICE ADMIN.**					
24	Disclosure Report	5,408	-	6,408	1,001	119%
25	Arbitrage Rebate Report	2,000	-	650	(1,350)	33%
26	Trustee Fees	17,500	-	14,000	(3,500)	80%
27	**TOTAL DEBT SERVICE ADMINISTRATION**	**24,908**	**-**	**21,058**	**(3,850)**	**84.54%**
28	**UTILITIES:**					
29	Utilities-Electricity	20,000	687	6,478	(13,522)	32%
30	Streetlights	295,000	21,990	236,939	(58,061)	80%
31	Utility Water	45,000	854	13,963	(31,037)	31%
32	**TOTAL UTILITIES:**	**360,000**	**23,532**	**257,380**	**(102,620)**	**71.49%**
33	**PHYSICAL ENVIRONMENT:**					
34	Lake & Pond Maintenance	54,600	3,460	61,325	6,725	112.32%
35	Landscape Maintenance	314,715	27,110	246,737	(67,978)	78%
36	Landscape - Replenishment	76,000	7,240	53,807	(22,193)	71%
37	Wetland Mitigation & Monitoring	49,800	-	26,200	(23,600)	53%
38	Field Management	6,489	541	5,408	(1,082)	83%
39	Field Contingency	88,900	-	34,586	(54,314)	39%
40	Hardscape Repairs & Maint.	15,000	-	22,477	7,477	150%
41	Stormwater Reporting	25,000	-	13,041	(11,959)	52%
42	Porter Services	10,000	610	4,929	(5,071)	49%
43	Pond Plantings and Erosion Control	15,000	-	-	(15,000)	0%
44	Fountain Repair	2,700	396	396	(2,304)	15%

		FY 2025 Adopted Budget	FY 2025 Month of July	FY 2025 Actual Year-to-Date	VARIANCE Over (Under) to Budget	% Actual YTD / FY Budget
45	Midge Fly Treatment	53,592	-	26,796	(26,796)	50%
46	Playground Repairs & Maint.	9,000	-	2,250	(6,750)	25%
47	Wildlife Removal	18,600	1,550	15,500	(3,100)	83%
48	Reserve Study	5,000	-	-	(5,000)	0%
49	**TOTAL PHYSICAL ENVIRONMENT**	**744,396**	**40,907**	**513,452**	**(230,944)**	**68.98%**
50	**TOTAL EXPENDITURES**	**1,322,552**	**75,689**	**923,196**	**(399,355)**	**69.80%**
51	**REVENUES OVER (UNDER) EXPENDITURES**	**-**	**(75,689)**	**398,479**	**398,479**	
52	**OTHER FINANCING SOURCES & USES**					
53	Transfers In	-	-	-	-	
54	Transfers Out	-	-	-	-	
55	**TOTAL OTHER FINANCING SOURCES & USES**	**-**	**-**	**-**	**-**	
56	**NET CHANGE IN FUND BALANCE**	**-**	**(75,689)**	**398,479**	**398,479**	
57	Fund Balance - Beginning			223,683	223,683	
58	**FUND BALANCE - ENDING - PROJECTED**	**$ -**		**$ 622,162**	**$ 622,162**	

Avalon Groves CDD
Debt Service 2017 (AA1)
Statement of Revenue, Expenditures, and Change in Fund Balance
For the period from October 1, 2024 to July 31, 2025

		FY 2025 Adopted Budget	FY 2025 Actual Year-to-Date	VARIANCE Over (Under) to Budget
1	**REVENUES**			
2	Special Assessments	$ 170,338	$ 170,585	$ 247
3	Lot Closings	-	-	-
4	Interest	-	8,912	8,912
5	Prepayments	-	-	-
6	**TOTAL REVENUES**	**170,338**	**179,497**	**9,159**
7	**EXPENDITURES**			
8	Interest Expense			
9	* November 1, 2024	62,106	61,406	(700)
10	May 1, 2025	62,106	61,263	(844)
11	November 1, 2025	60,981	-	(60,981)
12	Principal Retirement			
13	May 1, 2025	45,000	-	(45,000)
14	Principal Prepayment	-	50,000	50,000
15	**TOTAL EXPENDITURES**	**168,088**	**172,669**	**4,581**
16	**REVENUES OVER (UNDER) EXPENDITURES**	**2,250**	**6,828**	**4,578**
17	**OTHER FINANCING SOURCES (USES)**			
18	Transfers In	-	-	-
19	Transfers Out	-	-	-
20	**TOTAL OTHER FINANCING SOURCES (USES)**	**-**	**-**	**-**
21	**NET CHANGE IN FUND BALANCE**	**2,250**	**6,828**	**4,578**
22	Fund Balance - Beginning		265,792	
23	**FUND BALANCE - ENDING - PROJECTED**	**$ 2,250**	**$ 272,620**	**$ 270,370**

** financed by prior year revenues*

Avalon Groves Community Development District
Debt Service 2017A1 - 2 (AA2)
Statement of Revenue, Expenditures, and Change in Fund Balance
For the period from October 1, 2024 to July 31, 2025

		FY 2025 Adopted Budget	FY 2025 Actual Year-to-Date	VARIANCE Over (Under) to Budget
1	**REVENUES**			
2	Special Assessments	$ 500,600	$ 501,326	$ 726
3	Lot Closings	-	-	-
4	Interest	-	27,640	27,640
5	Prepayments		-	-
6	**TOTAL REVENUES**	**500,600**	**528,966**	**28,366**
7	**EXPENDITURES**			
8	Interest Expense			
9	* November 1, 2024	190,897	188,663	(2,234)
10	May 1, 2025	188,663	187,778	(884)
11	November 1, 2025	185,303	-	(185,303)
12	Principal Retirement			
13	May 1, 2025	125,000	-	(125,000)
14	Principal Prepayment	-	155,000	155,000
15	**TOTAL EXPENDITURES**	**498,966**	**531,441**	**32,475**
16	**REVENUES OVER (UNDER) EXPENDITURES**	**1,634**	**(2,475)**	**(4,109)**
17	**OTHER FINANCING SOURCES (USES)**			
18	Transfers In	-		-
19	Transfers Out	-	(20,822)	(20,822)
20	**TOTAL OTHER FINANCING SOURCES (USES)**	**-**	**(20,822)**	**(20,822)**
21	**NET CHANGE IN FUND BALANCE**	**1,634**	**(23,297)**	**(24,932)**
22	Fund Balance - Beginning		854,816	
23	**FUND BALANCE - ENDING - PROJECTED**	**$ 1,634**	**$ 831,518**	**$ 829,884**

** financed by prior year revenues*

Avalon Groves Community Development District
Debt Service 2019 (AA1)
Statement of Revenue, Expenditures, and Change in Fund Balance
For the period from October 1, 2024 to July 31, 2025

		FY 2025 Adopted Budget	FY 2025 Actual Year-to-Date	VARIANCE Over (Under) to Budget
1	**REVENUES**			
2	Special Assessments	$ 210,250	$ 210,555	$ 305
3	Lot Closings	-	-	-
4	Interest	-	8,442	8,442
5	Prepayments	-	-	-
6	**TOTAL REVENUES**	**210,250**	**218,997**	**8,747**
7	**EXPENDITURES**			
8	Interest Expense			
9	* November 1, 2024	67,330	67,330	0
10	May 1, 2025	66,074	66,074	0
11	November 1, 2025	66,074	-	(66,074)
12	Principal Retirement			
13	* November 1, 2024	75,000	75,000	-
14	November 1, 2025	75,000	-	(75,000)
15	Principal Prepayment	-	-	-
16	**TOTAL EXPENDITURES**	**207,148**	**208,404**	**1,256**
17	**REVENUES OVER (UNDER) EXPENDITURES**	**3,103**	**10,593**	**7,490**
18	**OTHER FINANCING SOURCES (USES)**			
19	Transfers In	-	-	-
20	Transfers Out	-	(65,050)	(65,050)
21	**TOTAL OTHER FINANCING SOURCES (USES)**	**-**	**(65,050)**	**(65,050)**
22	**NET CHANGE IN FUND BALANCE**	**3,103**	**(54,458)**	**(57,560)**
23	Fund Balance - Beginning		343,218	
24	**FUND BALANCE - ENDING - PROJECTED**	**$ 3,103**	**$ 288,761**	**$ 285,658**

** financed by prior year revenues*

Avalon Groves Community Development District
Debt Service 2021 Ph 3 & 4 (AA1)
Statement of Revenue, Expenditures, and Change in Fund Balance
For the period from October 1, 2024 to July 31, 2025

		FY 2025 Adopted Budget	FY 2025 Actual Year-to-Date	VARIANCE Over (Under) to Budget
1	**REVENUES**			
2	Special Assessments	$ 193,100	$ 193,380	$ 280
3	Lot Closings	-	-	-
4	Interest	-	2,401	2,401
5	Prepayments	-	-	-
6	**TOTAL REVENUES**	**193,100**	**195,781**	**2,681**
7	**EXPENDITURES**			
8	Interest Expense			
9	* November 1, 2024	56,369	56,369	-
10	May 1, 2025	56,369	56,369	-
11	November 1, 2025	55,469	-	(55,469)
12	Principal Retirement			
13	May 1, 2025	80,000	-	(80,000)
14	Principal Prepayment	-	80,000	80,000
15	**TOTAL EXPENDITURES**	**191,838**	**192,738**	**900**
16	**REVENUES OVER (UNDER) EXPENDITURES**	**1,263**	**3,044**	**1,781**
17	**OTHER FINANCING SOURCES (USES)**			
18	Transfers In	-	-	-
19	Transfers Out	-	-	-
20	**TOTAL OTHER FINANCING SOURCES (USES)**	**-**	**-**	**-**
21	**NET CHANGE IN FUND BALANCE**	**1,263**	**3,044**	**1,781**
22	Fund Balance - Beginning		82,277	
23	**FUND BALANCE - ENDING - PROJECTED**	**$ 1,263**	**$ 85,321**	**$ 84,059**

** financed by prior year revenues*

Avalon Groves Community Development District
Debt Service 2021 (AA3)
Statement of Revenue, Expenditures, and Change in Fund Balance
For the period from October 1, 2024 to July 31, 2025

		FY 2025 Adopted Budget	FY 2025 Actual Year-to-Date	VARIANCE Over (Under) to Budget
1	**REVENUES**			
2	Special Assessments	$ 336,400	$ 336,888	$ 488
3	Lot Closings	-	-	-
4	Interest	-	8,830	8,830
5	Prepayments	-	-	-
6	**TOTAL REVENUES**	**336,400**	**345,718**	**9,318**
7	**EXPENDITURES**			
8	Interest Expense			
9	* November 1, 2024	101,325	101,225	(100)
10	May 1, 2025	101,225	101,225	-
11	November 1, 2025	99,622	-	(99,622)
12	Principal Retirement			
13	May 1, 2025	135,000	-	(135,000)
14	Principal Prepayment	-	135,000	135,000
15	**TOTAL EXPENDITURES**	**335,847**	**337,450**	**1,603**
16	**REVENUES OVER (UNDER) EXPENDITURES**	**553**	**8,268**	**7,715**
17	**OTHER FINANCING SOURCES (USES)**			
18	Transfers In	-	80,822	80,822
19	Transfers Out	-	(8,422)	(8,422)
20	**TOTAL OTHER FINANCING SOURCES (USES)**	**-**	**72,400**	**72,400**
21	**NET CHANGE IN FUND BALANCE**	**553**	**80,668**	**80,115**
22	Fund Balance - Beginning		211,235	
23	**FUND BALANCE - ENDING - PROJECTED**	**$ 553**	**$ 291,902**	**$ 291,349**

** financed by prior year revenues*

Avalon Groves Community Development District
Debt Service 2022 (AA4)
Statement of Revenue, Expenditures, and Change in Fund Balance
For the period from October 1, 2024 to July 31, 2025

		FY 2025 Adopted Budget	FY 2025 Actual Year-to-Date	VARIANCE Over (Under) to Budget
1	**REVENUES**			
2	Special Assessments	$ 128,675	$ 128,862	$ 187
3	Lot Closings	-	-	-
4	Interest	-	2,546	2,546
5	Prepayments	-	-	-
6	**TOTAL REVENUES**	**128,675**	**131,408**	**2,733**
7	**EXPENDITURES**			
8	Interest Expense			
9	* November 1, 2024	44,638	44,638	0
10	May 1, 2025	44,638	44,638	0
11	November 1, 2025	43,838	-	(43,838)
12	Principal Retirement			
13	May 1, 2025	40,000	-	(40,000)
14	Principal Prepayment	-	40,000	40,000
15	**TOTAL EXPENDITURES**	**128,475**	**129,275**	**800**
16	**REVENUES OVER (UNDER) EXPENDITURES**	**200**	**2,133**	**1,933**
17	**OTHER FINANCING SOURCES (USES)**			
18	Transfers In	-	-	-
19	Transfers Out	-	(1,598)	(1,598)
20	**TOTAL OTHER FINANCING SOURCES (USES)**	**-**	**(1,598)**	**(1,598)**
21	**NET CHANGE IN FUND BALANCE**	**200**	**535**	**335**
22	Fund Balance - Beginning		85,895	
23	**FUND BALANCE - ENDING - PROJECTED**	**$ 200**	**$ 86,430**	**$ 86,230**

** financed by prior year revenues*

Avalon Groves Community Development District
Construction in Progress
Statement of Revenue, Expenditures, and Change in Fund Balance
For the period from October 1, 2024 to July 31, 2025

		2017 (AA1) Actual Year-to-Date	2017A-1 (AA2) Actual Year-to-Date	2019 Actual Year-to-Date	2021 PH 3/4 Actual Year-to-Date	2021 (AA3) Actual Year-to-Date	2022 (AA4) Actual Year-to-Date	Total
1	**REVENUES**							
2	Developer Funding	$ -	$ -	$ -	$ -	$ -	$ -	$ -
3	Insurance Claim	-	-	-	-	-	-	-
4	Interest	-	-	459	5	2,828	344	3,636
5	**TOTAL REVENUES**	**-**	**-**	**459**	**5**	**2,828**	**344**	**3,636**
6	**EXPENDITURES**							
7	Dissemination Agent	-	-	-	-	-	-	-
8	Trust Fund Accounting	-	-	-	-	-	-	-
9	Arbitrage	-	-	-	-	-	-	-
10	Trustee Fees	-	-	-	-	-	-	-
11	Requisitions	-	-	-	-	-	-	-
12	**TOTAL EXPENDITURES**	**-**	**-**	**-**	**-**	**-**	**-**	**-**
13	**REVENUES OVER (UNDER) EXPENDITURES**	**-**	**-**	**459**	**5**	**2,828**	**344**	**3,636**
14	**OTHER SOURCES (USES)**							
15	Transfer In	-	-	5,050	-	8,422	1,598	15,071
16	Transfer Out	-	-	-	-	-	-	-
17	**TOTAL OTHER SOURCES (USES)**	**-**	**-**	**5,050**	**-**	**8,422**	**1,598**	**15,071**
18	**NET CHANGE IN FUND BALANCE**	**-**	**-**	**5,510**	**5**	**11,251**	**1,942**	**18,707**
19	Fund Balance - Beginning	0	21	9,385	-	73,053	8,310	90,768
20	**FUND BALANCE - ENDING - PROJECTED**	**$ 0**	**$ 21**	**$ 14,894**	**$ 5**	**$ 84,303**	**$ 10,251**	**$ 109,475**

Avalon Groves CDD
Cash Reconciliation - General Fund
July 31, 2025

		Bank United (Operating Account)
Balance per Bank Statement	$	705,967.13
Construction Cash in Operating Account		(20.00)
Plus: Deposits in Transit		-
Less: Outstanding Checks		37,800.75
Adjusted Bank Balance	**$**	**668,146.38**
Beginning Bank Balance per Books		835,888.19
Deposits		-
Disbursements		167,741.81
Balance per Book	**$**	**668,146.38**

Avalon Groves Community Development District
Check Register
FY2025

Date	Number	Name	Memo	Deposit	Payments	Balance
9/30/2024		**Beginning of Year**				**265,180.64**
10/02/2024	100224ACH1	Sunshine Water Services	Basswood Ln Island Irrigation 7/22/24 - 8/22/24		2,625.04	262,555.60
10/02/2024	100224ACH2	Sunshine Water Services	Butterfly Pea Ct Cul-De-Sac 7/22/24 -8/22/24		56.30	262,499.30
10/02/2024	100224ACH3	Sunshine Water Services	Goldcrest Loop Playground 7/22/24 -8/22/24		13.63	262,485.67
10/03/2024	100324ACH1	SECO Energy	16920 Sawgrass Bay Blvd 8/15/24 - 9/16/24		110.00	262,375.67
10/03/2024	100324ACH2	SECO Energy	17494 Sawgrass Bay Blvd (Well #2) 8/15/24 - 9/16/24		42.00	262,333.67
10/03/2024	100324ACH3	SECO Energy	17325 Sawgrass Bay Blvd 8/15/24 - 9/16/24		359.00	261,974.67
10/03/2024	100324ACH4	SECO Energy	17052 Basswood Lane 8/15/24 - 9/16/24		43.00	261,931.67
10/03/2024	100324ACH5	SECO Energy	17650 Sawgrass Bay Blvd 8/15/24 - 9/16/24		92.00	261,839.67
10/09/2024	100924ACH1	Sunshine Water Services	Paragon Ln - Playground Irrigation 7/26/24 - 8/29/24		261.12	261,578.55
10/21/2024	100286	Steadfast Environmental, LLC	Invoice: SE-25151 (Reference: Aquatic Insecticide / Larvicide applications for ponds 1-65.)		13,398.00	248,180.55
10/21/2024	100287	Fountain Design Group, Inc.	Invoice: 34471A (Reference: QUARTERLY CLEANING OF ONE LAKE FOUNTAIN.)		175.00	248,005.55
10/21/2024	100288	BIO-TECH CONSULTING, INC.	Invoice: 181733 (Reference: Mitigation Monitoring.)		5,900.00	242,105.55
10/21/2024	100289	Down to Earth	Invoice: 115144 (Reference: Landscape Maintenance.)		27,110.25	214,995.30
10/22/2024	1711	Egis Insurance and Risk Advisors	Insurance FY 10/1/24 - 10/1/25 Policy # 100124288		31,836.00	183,159.30
10/28/2024	1712	Carl M. Weston	BOS Meeting 10/24/24		200.00	182,959.30
10/28/2024	1713	Eugene J. Mastrangeli	BOS Meeting 10/24/24		200.00	182,759.30
10/28/2024	1714	Michael W. Aube	BOS Meeting 10/24/24		200.00	182,559.30
10/28/2024	1715	Robert J. Wolski	BOS Meeting 10/24/24		200.00	182,359.30
10/28/2024	100290	Orlando Sentinel	Invoice: 101196267000 (Reference: Legal Advertising.)		156.00	182,203.30
10/28/2024	100291	Down to Earth	Invoice: 117701 (Reference: Monthly Irrigation Billing.)		861.55	181,341.75
10/28/2024	100292	Vesta District Services	Invoice: 422529 (Reference: Management Fees Oct 24.)		3,424.75	177,917.00
10/28/2024	100293	Stantec Consulting Services,Inc	Invoice: 2297356 (Reference: General Consulting.)		595.35	177,321.65
10/30/2024	100294	Kutak Rock LLP	Invoice: 3468770 (Reference: General Counsel.)		2,153.00	175,168.65
10/30/2024			Deposit	81.99		175,250.64
10/30/2024			Deposit	7,179.17		182,429.81
10/31/2024		**End of Month**		**7,261.16**	**90,011.99**	**182,429.81**
11/01/2024	110124ACH1	SECO Energy	17650 Sawgrass Bay Blvd 9/16/24 - 10/15/24		98.00	182,331.81
11/01/2024	110124ACH2	SECO Energy	17052 Basswood Lane 9/16/24 - 10/15/24		39.00	182,292.81
11/01/2024	110124ACH3	SECO Energy	17325 Sawgrass Bay Blvd 9/16/24 - 10/15/24		327.00	181,965.81
11/01/2024	110124ACH4	SECO Energy	17494 Sawgrass Bay Blvd (Well #2) 9/16/24 - 10/15/24		38.00	181,927.81
11/01/2024	110124ACH5	SECO Energy	16920 Sawgrass Bay Blvd 9/16/24 - 10/15/24		74.00	181,853.81
11/06/2024	110624ACH1	Sunshine Water Services	Butterfly Pea Ct Cul-De-Sac 8/22/24 - 9/24/24		59.60	181,794.21
11/06/2024	110624ACH2	Sunshine Water Services	Basswood Ln Island Irrigation 8/22/24 - 9/24/24		2,774.27	179,019.94
11/06/2024	110624ACH3	Sunshine Water Services	Paragon Ln - Playground Irrigation 8/29/24 - 9/27/24		234.08	178,785.86
11/06/2024	110624ACH4	Sunshine Water Services	Goldcrest Loop Playground 8/22/24 - 9/24/24		13.60	178,772.26
11/08/2024	100295	Vesta District Services	Invoice: 423010 (Reference: Management Fees Nov 24.)		3,424.75	175,347.51
11/08/2024	100296	Down to Earth	Invoice: 118482 (Reference: Landscape Maintenance Oct 24.) Invoice: 121470 (Reference: Monthl...		32,060.41	143,287.10
11/08/2024	100297	SchoolNow	Invoice: INV-SN-248 (Reference: Website Hosting.)		1,515.00	141,772.10
11/08/2024	100298	HV Solar Lighting	Invoice: 251 (Reference: Street Light Project Oct 24.) Invoice: 250 (Reference: Light Install...		41,360.00	100,412.10
11/08/2024	100299	Steadfast Environmental, LLC	Invoice: SE-25081 (Reference: Routine Aquatic Maintenance 10/24.)		3,370.14	97,041.96
11/08/2024	100300	Clean Star Services	Invoice: 13553 (Reference: Trash Service Oct 24.)		310.00	96,731.96
11/14/2024			Deposit	33,316.02		130,047.98
11/21/2024			Deposit	145,126.65		275,174.63
11/25/2024	1716	DEPT OF ECONOMIC OPPORTUNITY	FY 2024/2025 Special District Fee Invoice/Update Form		175.00	274,999.63
11/25/2024	100302	Vesta District Services	Invoice: 423154 (Reference: Dissemination Agent 10.24.) Invoice: 423125 (Reference: Billable ...		5,468.00	269,531.63
11/25/2024	100303	Down to Earth	Invoice: 120335 (Reference: Irrigation Repairs after Controller Replacement.)		1,506.62	268,025.01
11/25/2024	100304	Clean Star Services	Invoice: 13771 (Reference: Monthly Trash Collection - October 2024.)		310.00	267,715.01
11/25/2024	100305	Stantec Consulting Services,Inc	Invoice: 2308908 (Reference: General Consulting October 2024.)		3,690.00	264,025.01
11/25/2024	100306	Swine Solutions, LLC	Invoice: 548 (Reference: Monthly Trapping November 2024.)		1,550.00	262,475.01
11/25/2024			Deposit	155,155.88		417,630.89

Date	Number	Name	Memo	Deposit	Payments	Balance
11/30/2024				**333,598.55**	**98,397.47**	**417,630.89**
12/02/2024	120224ACH1	SECO Energy	16920 Sawgrass Bay Blvd 10/15/24 - 11/13/24		86.00	417,544.89
12/02/2024	120224ACH2	SECO Energy	17494 Sawgrass Bay Blvd (Well #2) 10/15/24 - 11/13/24		38.00	417,506.89
12/02/2024	120224ACH3	SECO Energy	17325 Sawgrass Bay Blvd 10/15/24 - 11/13/24		315.00	417,191.89
12/02/2024	120224ACH4	SECO Energy	17052 Basswood Lane 10/15/24 - 11/13/24		39.00	417,152.89
12/02/2024	120224ACH5	SECO Energy	17650 Sawgrass Bay Blvd 10/15/24 - 11/13/24		119.00	417,033.89
12/03/2024	100307	Kutak Rock LLP	Invoice: 3483891 (Reference: General Counsel thru 10/31/24.)		2,949.08	414,084.81
12/03/2024	100308	Down to Earth	Invoice: 122055 (Reference: Landscape Maintenance Nov 24.) Invoice: 124405 (Reference: - Brus...		30,789.02	383,295.79
12/03/2024	100309	HV Solar Lighting	Invoice: 286 (Reference: Installation of Lights.) Invoice: 287 (Reference: Street Light Proje...		20,680.00	362,615.79
12/03/2024	100310	Steadfast Environmental, LLC	Invoice: SE-25238 (Reference: Routine Aquatic Maintenance 11/24.)		3,370.14	359,245.65
12/03/2024	100311	Swine Solutions, LLC	Invoice: 549 (Reference: Monthly Trapping Service.)		1,550.00	357,695.65
12/04/2024	120424ACH1	Sunshine Water Services	Goldcrest Loop Playground 9/24/24 - 10/23/24		13.63	357,682.02
12/04/2024	120424ACH2	Sunshine Water Services	Butterfly Pea Ct Cul-De-Sac 9/24/24 - 10/23/24		54.07	357,627.95
12/04/2024	120424ACH3	Sunshine Water Services	Basswood Ln Island Irrigation 9/27/24 - 10/28/24		1,404.42	356,223.53
12/04/2024	120424ACH4	Sunshine Water Services	Paragon Ln - Playground Irrigation 9/27/24 - 10/28/24		237.88	355,985.65
12/06/2024	1717	Regions Bank.			7,000.00	348,985.65
12/11/2024	1718	Carl M. Weston	BOS Meeting 12/5/24		200.00	348,785.65
12/11/2024	1719	Eugene J. Mastrangeli	BOS Meeting 12/5/24		200.00	348,585.65
12/11/2024	1720	Robert J. Wolski	BOS Meeting 12/5/24		200.00	348,385.65
12/11/2024	100312	BIO-TECH CONSULTING, INC.	Invoice: 182424 (Reference: Mitigation Monitoring.)		2,000.00	346,385.65
12/11/2024	100313	Vesta District Services	Invoice: 423461 (Reference: Management Fees Dec 24.)		3,424.75	342,960.90
12/11/2024	100314	Steadfast Environmental, LLC	Invoice: SE-25517 (Reference: Midge Fly Treatment.)		6,699.00	336,261.90
12/11/2024	100315	Stantec Consulting Services,Inc	Invoice: 2322778 (Reference: General consulting thru 11/30/24.)		523.65	335,738.25
12/11/2024			Deposit	2,100,924.37		2,436,662.62
12/12/2024	100316	Vesta District Services	Invoice: 423557 (Reference: Billable Expenses - Nov 2024.)		30.00	2,436,632.62
12/16/2024	1721	John Holden	BOS Meeting 12/5/24		200.00	2,436,432.62
12/20/2024	100317	Down to Earth	Invoice: 128488 (Reference: - Monthly Irrigation Inspection Billing.)		717.13	2,435,715.49
12/23/2024	100318	Kutak Rock LLP	Invoice: 3499953 (Reference: General consulting thru 11/30/24.)		216.50	2,435,498.99
12/27/2024			Deposit	248,288.36		2,683,787.35
12/31/2024	100319	Steadfast Environmental, LLC	Invoice: SE-26007 (Reference: Difference in price per addendum beginning 10/24.)		269.58	2,683,517.77
12/31/2024	100320	Clean Star Services	Invoice: 14003 (Reference: Monthly Trash Service.)		310.00	2,683,207.77
12/31/2024				**2,349,212.73**	**83,635.85**	**2,683,207.77**
01/02/2025	100321	BIO-TECH CONSULTING, INC.	Invoice: 177069 (Reference: Mitigation Monitoring.) Invoice: 174099 (Reference: Mitigation Mo...		5,400.00	2,677,807.77
01/02/2025	100322	Down to Earth	Invoice: 125452 (Reference: Landscape Maintenance Dec 24.)		27,110.25	2,650,697.52
01/02/2025	100323	Steadfast Environmental, LLC	Invoice: SE-25439 (Reference: Routine Aquatic Maintenance 12/24.) Invoice: SE-26035 (Referenc...		6,830.14	2,643,867.38
01/02/2025	100324	Swine Solutions, LLC	Invoice: 556 (Reference: Monthly Trapping Service.)		1,550.00	2,642,317.38
01/02/2025	010225ACH1	Sunshine Water Services	Paragon Ln - Playground Irrigation 10/28/24 - 11/25/24		221.96	2,642,095.42
01/02/2025	010225ACH2	Sunshine Water Services	Basswood Ln Island Irrigation 10/28/24 - 11/25/24		555.26	2,641,540.16
01/02/2025	010225ACH3	Sunshine Water Services	Butterfly Pea Ct Cul-De-Sac 10/28/24 - 11/25/24		50.46	2,641,489.70
01/02/2025	010225ACH4	Sunshine Water Services	Goldcrest Loop Playground 10/28/24 - 11/25/24		13.99	2,641,475.71
01/02/2025	010225ACH5	SECO Energy	16920 Sawgrass Bay Blvd 11/13/24 - 12/13/24		86.00	2,641,389.71
01/02/2025	010225ACH6	SECO Energy	17494 Sawgrass Bay Blvd (Well #2) 11/13/24 - 12/13/24		39.00	2,641,350.71
01/02/2025	010225ACH7	SECO Energy	17325 Sawgrass Bay Blvd 11/13/24 - 12/13/24		338.00	2,641,012.71
01/02/2025	010225ACH8	SECO Energy	17052 Basswood Lane AvalonGroves1!		40.00	2,640,972.71
01/02/2025	010225ACH9	SECO Energy	17650 Sawgrass Bay Blvd 11/13/24 - 12/13/24		120.00	2,640,852.71
01/07/2025	100325	HV Solar Lighting	Invoice: 308 (Reference: Street Light - Edgemont Base Jan. 2025.) Invoice: 307 (Reference: St...		20,680.00	2,620,172.71
01/08/2025	100326	Fountain Design Group, Inc.	Invoice: 35146A (Reference: QUARTERLY CLEANING OF ONE LAKE FOUNTAIN.)		175.00	2,619,997.71
01/08/2025	100327	Vesta District Services	Invoice: 424074 (Reference: Management Fees Jan 25.)		3,424.75	2,616,572.96
01/09/2025	1722	Carl M. Weston	BOS Meeting 1/2/25		200.00	2,616,372.96
01/09/2025	1723	Eugene J. Mastrangeli	BOS Meeting 1/2/25		200.00	2,616,172.96
01/09/2025	1724	John Holden	BOS Meeting 1/2/25		200.00	2,615,972.96
01/09/2025	1725	Robert J. Wolski	BOS Meeting 1/2/25		200.00	2,615,772.96
01/10/2025	100328	Platinum Exterior Services LLC	Invoice: 1341 (Reference: Deposit for Pressure Cleaning.)		3,468.83	2,612,304.13
01/14/2025	100329	Stantec Consulting Services,Inc	Invoice: 2335708 (Reference: 2025 FY General Consulting - Dec 2024 & Jan 2025.)		1,410.00	2,610,894.13
01/15/2025	100330	Vesta District Services	Invoice: 424186 (Reference: Billable Expenses - Dec 2024.)		940.29	2,609,953.84
01/17/2025	100331	Kutak Rock LLP	Invoice: 3512700 (Reference: General Counsel Dec 24.)		3,389.49	2,606,564.35
01/17/2025	100332	Orlando Sentinel	Invoice: 107314890000 (Reference: Legal Advertising.)		112.25	2,606,452.10

Date	Number	Name	Memo	Deposit	Payments	Balance
01/23/2025			Deposit	45,287.35		2,651,739.45
01/28/2025	1726	Carl M. Weston	BOS Meeting 1/23/25		200.00	2,651,539.45
01/28/2025	1727	Eugene J. Mastrangeli	BOS Meeting 1/23/25		200.00	2,651,339.45
01/28/2025	1728	Gabriel Ruperez	BOS Meeting 1/23/25		200.00	2,651,139.45
01/28/2025	1729	John Holden	BOS Meeting 1/23/25		200.00	2,650,939.45
01/28/2025	1730	Robert J. Wolski	BOS Meeting 1/23/25		200.00	2,650,739.45
01/28/2025	100333	Down to Earth	Invoice: 130897 (Reference: Remove Fallen Palm.)		309.98	2,650,429.47
01/28/2025	100334	Steadfast Environmental, LLC	Invoice: SE-25347 (Reference: Partial billing of the fall Midge fly treatment.)		6,699.00	2,643,730.47
01/28/2025	100335	Swine Solutions, LLC	Invoice: 562 (Reference: Monthly Trapping Service.)		1,550.00	2,642,180.47
01/30/2025	100336	Clean Star Services	Invoice: 14237 (Reference: Trash Service Jan 25.)		310.00	2,641,870.47
01/31/2025	013125ACH1	SECO Energy	17650 Sawgrass Bay Blvd 12/13/24 - 1/14/25		130.00	2,641,740.47
01/31/2025	013125ACH2	SECO Energy	17052 Basswood Lane 12/13/2024 TO 01/14/2025		43.00	2,641,697.47
01/31/2025	013125ACH3	SECO Energy	17325 Sawgrass Bay Blvd 12/13/24 - 1/14/25		360.00	2,641,337.47
01/31/2025	013125ACH4	SECO Energy	17494 Sawgrass Bay Blvd (Well #2) 12/13/24 - 1/14/25		41.00	2,641,296.47
01/31/2025	013125ACH5	SECO Energy	16920 Sawgrass Bay Blvd 12/13/24 - 1/14/25		100.00	2,641,196.47
01/31/2025				**45,287.35**	**87,298.65**	**2,641,196.47**
02/04/2025	100337	HV Solar Lighting	Invoice: 346 (Reference: Install Lights.) Invoice: 347 (Reference: Street Light Project Feb 2...		20,680.00	2,620,516.47
02/04/2025	100338	Down to Earth	Invoice: 127462 (Reference: Landscape Maintenance Jan 25.) Invoice: 132295 (Reference: Monthl...		33,779.02	2,586,737.45
02/05/2025	020525ACH1	Sunshine Water Services	Butterfly Pea Ct Cul-De-Sac 11/19/24 - 12/23/24		59.99	2,586,677.46
02/05/2025	020525ACH2	Sunshine Water Services	Basswood Ln Island Irrigation 11/19/24 - 12/23/24		834.98	2,585,842.48
02/05/2025	020525ACH3	Sunshine Water Services	Paragon Ln - Playground Irrigation 11/25/24 - 12/30/24		226.30	2,585,616.18
02/05/2025	020525ACH4	Sunshine Water Services	Goldcrest Loop Playground 11/20/24 - 12/23/24		13.63	2,585,602.55
02/10/2025	100339	Vesta District Services	Invoice: 424702 (Reference: Management Fees Feb 25.)		3,424.75	2,582,177.80
02/10/2025	100340	Stantec Consulting Services,Inc	Invoice: 2350312 (Reference: General consulting thru 1/31/25.)		1,533.00	2,580,644.80
02/11/2025			Deposit	38,761.13		2,619,405.93
02/12/2025	1731	Disclosure Technology Services LLC	Reference: DTS MUNI - CDASaaS, 1 Year Subscription FY24/25		1,000.00	2,618,405.93
02/19/2025	100341	Steadfast Environmental, LLC	Invoice: SE-26269 (Reference: Stocking of Pond.)		6,500.00	2,611,905.93
02/19/2025	100342	Vesta District Services	Invoice: 424818 (Reference: Billable Expenses - Jan 2025.)		1,519.95	2,610,385.98
02/20/2025	100343	Platinum Exterior Services LLC	Invoice: 1341-1 (Reference: Final Payment.)		8,093.93	2,602,292.05
2/28/2025				**38,761.13**	**77,665.55**	**2,602,292.05**
03/03/2025	1732	Carl M. Weston	BOS Meeting 2/27/25		200.00	2,602,092.05
03/03/2025	1733	Eugene J. Mastrangeli	BOS Meeting 2/27/25		200.00	2,601,892.05
03/03/2025	1734	Gabriel Ruperez	BOS Meeting 2/27/25		200.00	2,601,692.05
03/03/2025	1735	John Holden	BOS Meeting 2/27/25		200.00	2,601,492.05
03/03/2025	1736	Robert J. Wolski	BOS Meeting 2/27/25		200.00	2,601,292.05
03/03/2025	100344	Kutak Rock LLP	Invoice: 3526955 (Reference: General Counsel Jan.)		4,863.50	2,596,428.55
03/03/2025	100345	Down to Earth	Invoice: 131565 (Reference: Landscape Maintenance Feb 25.) Invoice: 135456 (Reference: Monthl...		27,443.32	2,568,985.23
03/03/2025	100346	Vesta District Services	Invoice: 424934 (Reference: Management Fees Mar 25.)		3,424.75	2,565,560.48
03/03/2025	100347	Steadfast Environmental, LLC	Invoice: SE-26186 (Reference: Routine Aquatic Maintenance Feb 25.)		3,460.00	2,562,100.48
03/03/2025	100348	Clean Star Services	Invoice: 14467 (Reference: Trash Service Feb 25.)		310.00	2,561,790.48
03/04/2025	030425ACH1	SECO Energy	17650 Sawgrass Bay Blvd 1/14/25 - 2/13/25		127.00	2,561,663.48
03/04/2025	030425ACH2	SECO Energy	17052 Basswood Lane 1/14/25 - 2/13/25		40.00	2,561,623.48
03/04/2025	030425ACH3	SECO Energy	17325 Sawgrass Bay Blvd 1/14/25 - 2/13/25		336.00	2,561,287.48
03/04/2025	030425ACH4	SECO Energy	17494 Sawgrass Bay Blvd (Well #2) 1/14/25 - 2/13/25		39.00	2,561,248.48
03/04/2025	030425ACH5	SECO Energy	16920 Sawgrass Bay Blvd 1/14/25 - 2/13/25		105.00	2,561,143.48
03/07/2025	100349	Swine Solutions, LLC	Invoice: 570 (Reference: Monthly Trapping Service.)		1,550.00	2,559,593.48
03/07/2025	030725ACH1	Sunshine Water Services	Goldcrest Loop Playground 12/23/24 - 1/22/25		13.67	2,559,579.81
03/07/2025	030725ACH2	Sunshine Water Services	Butterfly Pea Ct Cul-De-Sac 12/23/24 - 1/22/25		31.21	2,559,548.60
03/07/2025	030725ACH3	Sunshine Water Services	Basswood Ln Island Irrigation 12/23/25 - 1/22/25		737.75	2,558,810.85
03/07/2025	030725ACH4	Sunshine Water Services	Paragon Ln - Playground Irrigation 12/30/24 - 1/28/25		209.89	2,558,600.96
03/10/2025	100350	HV Solar Lighting	Invoice: 363 (Reference: Street Light Project March 25.) Invoice: 362 (Reference: Light Insta...		20,680.00	2,537,920.96
03/10/2025	100351	Stantec Consulting Services,Inc	Invoice: 2364257 (Reference: General Consulting Feb 25.)		1,980.00	2,535,940.96
03/11/2025	100352	Fly by Night, Inc.	Invoice: 1000726 (Reference: Bat Houses.)		1,846.37	2,534,094.59
03/13/2025	100353	Vesta District Services	Invoice: 425345 (Reference: Billable Expenses - Feb 2025.)		2,270.38	2,531,824.21
03/13/2025	100354	Orlando Sentinel	Invoice: 112469429000 (Reference: Legal Advertising.)		108.75	2,531,715.46
03/14/2025			Deposit	23,845.61		2,555,561.07
03/18/2025	100355	Dibartolomeo, McBee, Hartley & Barnes, P	Invoice: 90108295 (Reference: Audit Services thru September 2024.)		3,250.00	2,552,311.07

Date	Number	Name	Memo	Deposit	Payments	Balance
03/18/2025	100356	Down to Earth	Invoice: 136280 (Reference: Reconnect Main line to new pipe.) Invoice: 136279 (Reference: Irr...		13,714.23	2,538,596.84
03/25/2025	1738	Regions Bank.			1,504,478.48	1,034,118.36
03/26/2025	100357	Swine Solutions, LLC	Invoice: 580 (Reference: Trapping Services.)		1,550.00	1,032,568.36
03/28/2025	100358	Clean Star Services	Invoice: 14697 (Reference: Trash Service Mar 25.)		597.50	1,031,970.86
03/31/2025	100359	Steadfast Environmental, LLC	Invoice: SA-10114 (Reference: Routine Aquatic Maintenance 3.25.)		3,460.00	1,028,510.86
03/31/2025	100360	Down to Earth	Invoice: 134618 (Reference: Landscape Maintenance Mar 25.)		27,110.25	1,001,400.61
03/31/2025				**23,845.61**	**1,624,737.05**	**1,001,400.61**
04/01/2025	1739	Carl M. Weston	BOS Meeting 3/27/25		200.00	1,001,200.61
04/01/2025	1740	Eugene J. Mastrangeli	BOS Meeting 3/27/25		200.00	1,001,000.61
04/01/2025	1741	Gabriel Ruperez	BOS Meeting 3/27/25		200.00	1,000,800.61
04/01/2025	1742	John Holden	BOS Meeting 3/27/25		200.00	1,000,600.61
04/01/2025	1743	Regions Bank.	Annual Trustee Fees Series 2017		3,500.00	997,100.61
04/01/2025	1744	Robert J. Wolski	BOS Meeting 3/27/25		200.00	996,900.61
04/01/2025	1745	Regions Bank.	Annual Trustee Fees Series 2017 A-1		3,500.00	993,400.61
04/01/2025	1746	Regions Bank.	Annual Trustee Fees Series 2021		3,500.00	989,900.61
04/01/2025	100361	Down to Earth	Invoice: 137831 (Reference: Monthly Irrigation Inspection Billing.)		539.46	989,361.15
04/01/2025	100362	HV Solar Lighting	Invoice: 392 (Reference: Streetlight Installation.) Invoice: 393 (Reference: Street Light Pro...		20,680.00	968,681.15
04/01/2025	100363	Vesta District Services	Invoice: 425411 (Reference: Management Fees April 25.)		3,424.75	965,256.40
04/03/2025	040325ACH1	Sunshine Water Services	Paragon Ln - Playground Irrigation 1/28/25 - 2/28/25		108.56	965,147.84
04/03/2025	040325ACH2	Sunshine Water Services	Basswood Ln Island Irrigation 1/22/25 - 2/25/25		524.57	964,623.27
04/03/2025	040325ACH3	Sunshine Water Services	Butterfly Pea Ct Cul-De-Sac 1/22/25 - 2/25/25		22.71	964,600.56
04/03/2025	040325ACH4	Sunshine Water Services	Goldcrest Loop Playground 1/22/25 - 2/25/25		13.67	964,586.89
04/03/2025	040325ACH5	SECO Energy	16920 Sawgrass Bay Blvd 2/13/25 - 3/17/25		102.00	964,484.89
04/03/2025	040325ACH6	SECO Energy	17494 Sawgrass Bay Blvd (Well #2) 2/13/25 - 3/17/25		41.00	964,443.89
04/03/2025	040325ACH7	SECO Energy	17325 Sawgrass Bay Blvd 2/13/25 - 3/17/25		362.00	964,081.89
04/03/2025	040325ACH8	SECO Energy	17052 Basswood Lane 2/13/25 - 3/17/25		43.00	964,038.89
04/03/2025	040325ACH9	SECO Energy	17650 Sawgrass Bay Blvd 2/13/25 - 3/17/25		106.00	963,932.89
04/04/2025	100364	Fountain Design Group, Inc.	Invoice: 35865A (Reference: QUARTERLY CLEANING OF ONE LAKE FOUNTAIN.)		175.00	963,757.89
04/04/2025	100365	Kutak Rock LLP	Invoice: 3541552 (Reference: General Counsel Feb 25.)		3,911.34	959,846.55
04/07/2025	100366	Stantec Consulting Services,Inc	Invoice: 2377736 (Reference: General Consulting Mar 25.)		1,125.00	958,721.55
04/14/2025	100367	Vesta District Services	Invoice: 425898 (Reference: Billable Expenses - Mar 2025.)		1,373.55	957,348.00
04/14/2025	100368	Orlando Sentinel	Invoice: 114161113000 (Reference: Legal Advertising.)		112.25	957,235.75
04/16/2025	100369	Steadfast Environmental, LLC	Invoice: SA-11356 (Reference: Midge Fly Treatment.)		6,699.00	950,536.75
04/22/2025	100370	Kutak Rock LLP	Invoice: 3553351 (Reference: General Counsel Mar 25.)		1,908.49	948,628.26
04/25/2025	100371	Swine Solutions, LLC	Invoice: 589 (Reference: Monthly trapping services.)		1,550.00	947,078.26
04/29/2025	1747	Carl M. Weston	BOS Meeting 4/24/25		200.00	946,878.26
04/29/2025	1748	Eugene J. Mastrangeli	BOS Meeting 4/24/25		200.00	946,678.26
04/29/2025	1749	Gabriel Ruperez	BOS Meeting 4/24/25		200.00	946,478.26
04/29/2025	1750	John Holden	BOS Meeting 4/24/25		200.00	946,278.26
04/29/2025	1677	Robert J. Wolski	BOS Meeting 4/24/25		200.00	946,078.26
04/30/2025			Deposit	24,585.89		970,664.15
04/30/2025				**24,585.89**	**55,322.35**	**970,664.15**
05/01/2025	100372	BIO-TECH CONSULTING, INC.	Invoice: 184550 (Reference: Mitigation Monitoring.)		3,500.00	967,164.15
05/01/2025	100373	Vesta District Services	Invoice: 425987 (Reference: Management Fees May 25.)		3,424.75	963,739.40
05/01/2025	100374	Steadfast Environmental, LLC	Invoice: SA-11066 (Reference: Routine Aquatic Maintenance April 25.)		3,460.00	960,279.40
05/01/2025	100375	Clean Star Services	Invoice: 14921 (Reference: Trash Service April 25.)		579.00	959,700.40
05/01/2025	100376	Down to Earth	Invoice: 138024 (Reference: Landscape Maintenance April 25.) Invoice: 140215 (Reference: Clea...		1,629.06	958,071.34
05/02/2025	100377	HV Solar Lighting	Invoice: 409 (Reference: Street Light Project May 25.) Invoice: 408 (Reference: Light Install...		20,680.00	937,391.34
05/02/2025	050225ACH1	SECO Energy	16920 Sawgrass Bay Blvd 3/17/25 - 4/15/25		91.00	937,300.34
05/02/2025	050225ACH2	SECO Energy	17494 Sawgrass Bay Blvd (Well #2) 3/17/25 - 4/15/25		38.00	937,262.34
05/02/2025	050225ACH3	SECO Energy	17325 Sawgrass Bay Blvd 3/17/25 - 4/15/25		327.00	936,935.34
05/02/2025	050225ACH4	SECO Energy	17052 Basswood Lane 3/17/25 - 4/15/25		39.00	936,896.34
05/02/2025	050225ACH5	SECO Energy	17650 Sawgrass Bay Blvd 3/17/25 - 4/15/25		109.00	936,787.34
05/08/2025	100378	Steadfast Environmental, LLC	Invoice: SA-11943 (Reference: Midge Fly Treatment.)		6,699.00	930,088.34
05/08/2025	050825ACH1	BANK UNITED	Business Checks		266.91	929,821.43
05/13/2025	100379	Down to Earth	Invoice: 141995 (Reference: Wire Repairs.)		2,217.74	927,603.69
05/14/2025	051425ACH1	Sunshine Water Services	Basswood Ln Island Irrigation 2/25/25 - 3/24/25		615.01	926,988.68

Date	Number	Name	Memo	Deposit	Payments	Balance
05/14/2025	051425ACH2	Sunshine Water Services	Goldcrest Loop Playground 2/21/25 - 3/25/25		13.73	926,974.95
05/14/2025	051425ACH3	Sunshine Water Services	Butterfly Pea Ct Cul-De-Sac 2/25/25 - 3/24/25		19.74	926,955.21
05/15/2025	051525ACH1	Sunshine Water Services	Paragon Ln - Playground Irrigation 2/28/25 - 3/28/25		143.99	926,811.22
05/15/2025	100380	Vesta District Services	Invoice: 426649 (Reference: Billable Expenses - Apr 2025.)		658.84	926,152.38
05/22/2025	100381	Stantec Consulting Services,Inc	Invoice: 2397474 (Reference: General Consulting April 25.)		5,504.20	920,648.18
05/27/2025	1679	Carl M. Weston	BOS Meeting 5/22/25		200.00	920,448.18
05/27/2025	1680	Eugene J. Mastrangeli	BOS Meeting 5/22/25		200.00	920,248.18
05/27/2025	1681	Gabriel Ruperez	BOS Meeting 5/22/25		200.00	920,048.18
05/27/2025	1751	John Holden	BOS Meeting 5/22/25		200.00	919,848.18
05/27/2025	1752	Robert J. Wolski	BOS Meeting 5/22/25		200.00	919,648.18
05/27/2025	100382	Kutak Rock LLP	Invoice: 3567893 (Reference: General Counsel Apr 25.)		2,446.00	917,202.18
05/28/2025	100383	Clean Star Services	Invoice: 15156 (Reference: Trash Service May 25.)		610.00	916,592.18
05/30/2025	100384	Swine Solutions, LLC	Invoice: 603 (Reference: Trapping Services.)		1,550.00	915,042.18
05/30/2025			Deposit	15,865.33		930,907.51
05/30/2025			Deposit	12,517.04		943,424.55
5/31/2025				**28,382.37**	**55,621.97**	**943,424.55**
06/02/2025	060225ACH1	SECO Energy	16920 Sawgrass Bay Blvd 4/15/25 - 5/14/25		107.00	943,317.55
06/02/2025	060225ACH2	SECO Energy	17494 Sawgrass Bay Blvd (Well #2) 4/15/25 - 5/14/25		44.00	943,273.55
06/02/2025	060225ACH3	SECO Energy	17325 Sawgrass Bay Blvd 4/15/25 - 5/14/25		355.00	942,918.55
06/02/2025	060225ACH4	SECO Energy	17052 Basswood Lane 4/15/25 - 5/14/25		46.00	942,872.55
06/02/2025	060225ACH5	SECO Energy	17650 Sawgrass Bay Blvd 4/15/25 - 5/14/25		137.00	942,735.55
06/02/2025	100385	Vesta District Services	Invoice: 426735 (Reference: Management Fees June 25.)		3,424.75	939,310.80
06/04/2025	100386	Steadfast Environmental, LLC	Invoice: SA-11866 (Reference: Routine Aquatic Maintenance May 25.) Invoice: SA-12484 (Referen...		10,159.00	929,151.80
06/04/2025	100387	Down to Earth	Invoice: 140638 (Reference: Landscape Maintenance May 25.) Invoice: 144343 (Reference: Irriga...		28,320.40	900,831.40
06/04/2025	100388	Platinum Exterior Services LLC	Invoice: 1401 (Reference: Pressure washing Sidewalks & Curbs.)		3,965.80	896,865.60
06/04/2025	100389	HV Solar Lighting	Invoice: 436 (Reference: Street Light Project June 25.)		2,600.00	894,265.60
06/04/2025	100390	LLS Tax Solutions Inc.	Invoice: 003763 (Reference: Arbitrage Services.)		650.00	893,615.60
06/06/2025	1753	David Jordan Lake County Tax Collector	Account #2424260001-000-01800		6,261.26	887,354.34
06/09/2025	100391	Down to Earth	Invoice: 144479 (Reference: Conservation Cutbacks.) Invoice: 144848 (Reference: Landscape Ins...		17,802.08	869,552.26
06/10/2025	100392	Vesta District Services	Invoice: 427131 (Reference: Billable Expenses - May 2025.)		127.87	869,424.39
06/10/2025	100393	Stantec Consulting Services,Inc	Invoice: 2406000 (Reference: General Consulting May 25.)		2,710.90	866,713.49
06/11/2025	061125ACH1	Sunshine Water Services	Paragon Ln - Playground Irrigation 3/28/25 - 4/29/25		186.25	866,527.24
06/11/2025	061125ACH2	Sunshine Water Services	Basswood Ln Island Irrigation 3/25/25 - 4/29/25		707.39	865,819.85
06/11/2025	061125ACH3	Sunshine Water Services	Butterfly Pea Ct Cul-De-Sac 3/25/25 - 4/29/25		22.25	865,797.60
06/11/2025	061125ACH4	Sunshine Water Services	Goldcrest Loop Playground 3/25/25 - 4/29/25		13.86	865,783.74
06/12/2025	1754	Regions Bank.	Annual Trustee Fees Series 2022		3,500.00	862,283.74
06/12/2025	1755	Regions Bank.	Annual Trustee Fees Series 2021		3,500.00	858,783.74
06/12/2025	061225ACH1	Sunshine Water Services	17735 Blazing Star Circle Irrigation 5/5/25 - 5/19/25		161.73	858,622.01
06/12/2025	061225ACH2	Sunshine Water Services	17851 Blazing Star Circle Irrigation 5/5/25 - 5/19/25		107.73	858,514.28
06/16/2025	100394	Orlando Sentinel	Invoice: 117420815000 (Reference: Legal Advertising.)		114.00	858,400.28
06/24/2025	100395	BIO-TECH CONSULTING, INC.	Invoice: 185198 (Reference: Mitigation Monitoring.)		5,900.00	852,500.28
06/24/2025	100396	Kutak Rock LLP	Invoice: 3581950 (Reference: General Counsel May 25.)		3,458.69	849,041.59
06/30/2025	100397	Steadfast Environmental, LLC	Invoice: SA-12388 (Reference: Routine Aquatic Maintenance June 25.)		3,460.00	845,581.59
06/30/2025	100398	Clean Star Services	Invoice: 15389 (Reference: Trash Service June 25.)		630.00	844,951.59
06/30/2025	100399	Swine Solutions, LLC	Invoice: 621 (Reference: Monthly Trapping Service.)		1,550.00	843,401.59
06/30/2025	100400	Down to Earth	Invoice: 143883 (Reference: Landscape Maintenance June 25.)		27,110.25	816,291.34
06/30/2025			Deposit	19,596.85		835,888.19
06/30/2025				**19,596.85**	**127,133.21**	**835,888.19**
07/01/2025	1756	Carl M. Weston	BOS Meeting 6/26/25		200.00	835,688.19
07/01/2025	1757	Eugene J. Mastrangeli	BOS Meeting 6/26/25		200.00	835,488.19
07/01/2025	1758	Gabriel Ruperez	BOS Meeting 6/26/25		200.00	835,288.19
07/01/2025	1759	John Holden	BOS Meeting 6/26/25		200.00	835,088.19
07/01/2025	1760	Robert J. Wolski	BOS Meeting 6/26/25		200.00	834,888.19
07/01/2025	100401	HV Solar Lighting	Invoice: 454 (Reference: Street Light Project July 25.) Invoice: 453 (Reference: Light Instal...		20,680.00	814,208.19
07/02/2025	070225ACH1	SECO Energy	16920 Sawgrass Bay Blvd 5/14/25 - 6/13/25		124.00	814,084.19
07/02/2025	070225ACH2	SECO Energy	17494 Sawgrass Bay Blvd (Well #2) 5/14/25 - 6/13/25		45.00	814,039.19
07/02/2025	070225ACH3	SECO Energy	17325 Sawgrass Bay Blvd 5/14/25 - 6/13/25		366.00	813,673.19

Date	Number	Name	Memo	Deposit	Payments	Balance
07/02/2025	070225ACH4	SECO Energy	17052 Basswood Lane 5/14/25 - 6/13/25		47.00	813,626.19
07/02/2025	070225ACH5	SECO Energy	17650 Sawgrass Bay Blvd 5/14/25 - 6/13/25		145.00	813,481.19
07/03/2025	100402	Vesta District Services	Invoice: 427200 (Reference: Management Fees July 25.)		3,424.75	810,056.44
07/03/2025	100403	Down to Earth	Invoice: 146992 (Reference: Irrigation Repairs.)		392.55	809,663.89
07/03/2025	100404	Stantec Consulting Services,Inc	Invoice: 2418289 (Reference: General Consulting June 25.)		4,558.75	805,105.14
07/07/2025	1761	Regions Bank.	Annual Trustee Fees Series 2019		3,500.00	801,605.14
07/08/2025	100405	Down to Earth	Invoice: 147304 (Reference: Playground Mulch Refresh.) Invoice: 147303 (Reference: Running Ma...		29,663.39	771,941.75
07/08/2025	070825ACH1	Sunshine Water Services	17344 Blazing Star Circle Irrigation 5/5/25 - 5/19/25		107.73	771,834.02
07/09/2025	070925ACH1	Sunshine Water Services	Paragon Ln - Playground Irrigation 4/29/25 - 5/28/25		195.45	771,638.57
07/09/2025	070925ACH2	Sunshine Water Services	Basswood Ln Island Irrigation 4/23/25 - 5/22/25		855.00	770,783.57
07/09/2025	070925ACH3	Sunshine Water Services	Butterfly Pea Ct Cul-De-Sac 4/22/25 - 5/21/25		13.57	770,770.00
07/09/2025	070925ACH4	Sunshine Water Services	Goldcrest Loop Playground 4/23/25 - 5/21/25		13.67	770,756.33
07/14/2025	100406	Fountain Design Group, Inc.	Invoice: 36617A (Reference: Replace Capacitors.) Invoice: 36665A (Reference: QUARTERLY CLEANI...		396.30	770,360.03
07/14/2025	100407	HV Solar Lighting	Invoice: 465 (Reference: Street Light Project July 25.) Invoice: 464 (Reference: Street Light...		30,139.20	740,220.83
07/14/2025	071425ACH1	Sunshine Water Services	17344 Blazing Star Circle Irrigation 5/5/25 - 6/4/25		13.61	740,207.22
07/14/2025	071425ACH2	Sunshine Water Services	17851 Blazing Star Circle Irrigation 5/5/25 - 5/28/25		13.61	740,193.61
07/16/2025	100408	HV Solar Lighting	Invoice: 438 (Reference: Light Installation.)		18,080.00	722,113.61
07/16/2025	100409	Rowland DE LLC	Invoice: 1491B (Reference: Stormwater cleanup.)		13,041.00	709,072.61
07/16/2025	100410	Vesta District Services	Invoice: 427594 (Reference: Billable Expenses - June 2025.)		250.50	708,822.11
07/17/2025	100411	Kutak Rock LLP	Invoice: 3596156 (Reference: General Counsel June 25.)		2,807.50	706,014.61
07/21/2025	100412	BIO-TECH CONSULTING, INC.	Invoice: 183196 (Reference: Baseline Mitigation Monitoring.)		3,500.00	702,514.61
07/28/2025	100413	Down to Earth	Invoice: 149541 (Reference: Palm Replacement.)		3,187.98	699,326.63
07/30/2025	100414	Clean Star Services	Invoice: 15629 (Reference: Trash Service July 25.)		610.00	698,716.63
07/30/2025	100415	Steadfast Environmental, LLC	Invoice: SA-13355 (Reference: Routine Aquatic Maintenance.)		3,460.00	695,256.63
07/31/2025	100416	Down to Earth	Invoice: 146566 (Reference: Landscape Maintenance July 25.)		27,110.25	668,146.38
07/31/2025				**0.00**	**167,741.81**	**668,146.38**

EXHIBIT 12

VISUAL INSPECTION AUDIT SHEET

LANDSCAPE MAINTENANCE	SATISFACTORY	UNSATISFACTORY	NOTE / REASON
TURF MOW (grass height, patterns changed, free of grass clumps and landscape debris)	XX		
TURF FERTILITY (dead/browning grass, nutrient levels tested 2 x yearly, fertilizer streaking)	XX		
TURF EDGING (sidewalks, curbs, pathways, and other paved surfaces, no discharge, no irregular lines)	XX		
WEED CONTROL – TURF AREAS (reasonably free of weeds)	XX		
WEED CONTROL – BED AREAS (reasonably free of weeds)	XX		
PLANT BED INSECT/DISEASE CONTROL (monitor for pests, disease, fungus)	XX		
PRUNING & TREE TRIMMING (15 feet over roadways, 8 feet sidewalks and elsewhere)	XX		
CLEANLINESS (debris free, leaf litter, landscape debris, grass clippings)	XX		
MULCHING (distributed appropriately, bare areas, recommended is 3”)		XX	Proposal Approved, work to start
WATER/IRRIGATION MANAGEMENT	XX		
PRIOR MAINTENANCE ITEMS ADDRESSED	XX		Hole next to sidewalk by sawgrass and pacific remains unsecured.

Location: Edgemont | PAS | V1 | V2 | V3 | Alton Serenoa (V4)

Date: 7/30/25

Auditor: Ruperez

VISUAL INSPECTION AUDIT SHEET

LANDSCAPE MAINTENANCE	SATISFACTORY	UNSATISFACTORY	NOTE / REASON
TURF MOW (grass height, patterns changed, free of grass clumps and landscape debris)	✓		
TURF FERTILITY (dead/browning grass, nutrient levels tested 2 x yearly, fertilizer streaking)			N/A
TURF EDGING (sidewalks, curbs, pathways, and other paved surfaces, no discharge, no irregular lines)	✓		—
WEED CONTROL – TURF AREAS (reasonably free of weeds)	✓		—
WEED CONTROL – BED AREAS (reasonably free of weeds)	✓		—
PLANT BED INSECT/DISEASE CONTROL (monitor for pests, disease, fungus)	✓		—
WATER/IRRIGATION MANAGEMENT	✓		
PRIOR MAINTENANCE ITEMS ADDRESSED	✓		.

Location: Edgemont | PAS | V1 | V2 | V3 | Alton Serenoa (V4)
Date: 8 August 2025
Auditor: Weston | Ruperez

NOTE:

1. Mowing job is getting sloppy in and around PAS Clubhouse. Missed mowed spots, several grass clumps and low cutting. See pics.
2. Mowing is not being done on a weekly basis around the back area of residential homes (PAS), including other villages.

Thursday, August 7, 2025 · 10:42 AM

Edit

Thursday, August 7, 2025 · 10:44 AM

Edit

Thursday, August 7, 2025 · 10:45 AM

Edit

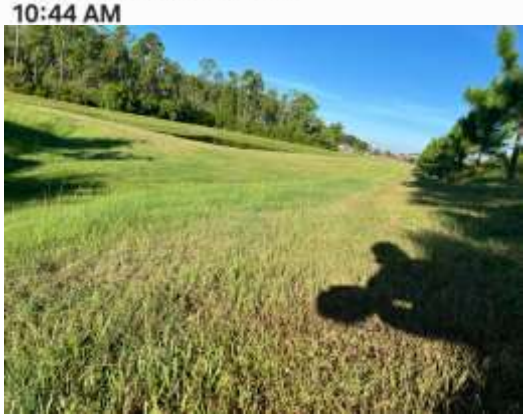

EXHIBIT 13

Avalon Groves – Outstanding Action Items FY 2025
Completed action items have been archived
DM – District Manager (Kyle Darin/Heath Beckett, Vesta District Services)
DC – District Counsel (Bennett Davenport, Kutak Rock)
DE – District Engineer (Greg Woodcock, Stantec)
FM - Field Manager (Michael Bush, Vesta)

Assigned To:	Assignment	Date Assigned	Date Completed	Notes
DE	Review turning lane into Palms as it floods	7/24/2025		
DE	Confirm Sunshine Water had the appropriate permit to release water into the stormwater system	5/22/2025		
DE	Confirm fence ownership/maintenance responsibility, designation of land, and allowable planting between the 2 ponds at the end of Saw Palmetto (once the plans received from Lake County)	5/22/2025		
DE	Confirm SJRWMD reporting/maintenance requirements (Bio-Tech Consulting)	5/22/2025		(Note: Bio-Tech agreement is for 5 years of annual monitoring & quarterly maintenance events)
DE	Plans for the streets?	4/24/2025		Sawgrass Bay Blvd widening - as may affect landscape projects
DC	Look into contract with lighting vendor to see if there is a clause for responding to repair requests	7/24/2025		
DC	Work with DM to follow up with KB Homes regarding compensation for the landscape material lost as a result of the irrigation damage	5/22/2025		
DC	Letter to lighting company from either District Manager or District Council	3/27/2025		
DC	Provide District Manager with verbiage on fireworks for letter to residents	3/27/2025		
DC	Senate Bill 140	3/27/2025		
DC/DE	Compose letter detailing information on wetland buffers to be mailed to entire community.	6/27/2024		Staff drafted, awaiting Board edits
DM	Contact leasing agent for commercial site regarding landscape maintenance. If they are not responsive, complain to Lake County	7/24/2025		
DM	Send written notice to resident at 3736 Paragon Ln regarding removal of unauthorized hose connection to CDD irrigation.	6/26/2025		
DM	Follow up with Blazing Star resident about sod and irrigation replacement by pool company	6/26/2025		
DM	Send roundabout punch list to District Counsel	6/26/2025		
DM	Reach out to homeowners with fences on easement regarding easement encroachment agreements.	6/26/2025		
DM	Follow up on pool contractor re-sod easement	5/22/2025		
DM	Follow up on the Edgemont punch list next week	5/22/2025		

Avalon Groves – Outstanding Action Items FY 2025
Completed action items have been archived
DM – District Manager (Kyle Darin/Heath Beckett, Vesta District Services)
DC – District Counsel (Bennett Davenport, Kutak Rock)
DE – District Engineer (Greg Woodcock, Stantec)
FM - Field Manager (Michael Bush, Vesta)

Assigned To:	Assignment	Date Assigned	Date Completed	Notes
DM	Process for adding GL Codes to the proposals presented on the agenda	5/22/2025		
DM	Heath to have lines of communication with KB Homes for grass and plant damage that occurred due to the irrigation lines not working for the last 2 plus years. Gene would like for us to build a case and submit to KB Homes	4/24/2025		5/22: Follow up with KB Homes regarding compensation for the landscape material lost as a result of the irrigation damage
DM	Confirm whether insurance will cover the shade structures	3/27/2025		
DM	Review coding of invoices assigned to Streetlights and Landscape Maintenance	2/27/2025		
DM	Check whether streetlight reports are available	2/27/2025		
FM	Submit a ticket to Lake County about sidewalks	7/24/2025		
FM	Discuss Recovered Energy options for solar outlets for Edgemont & Village 1 w/Mr. Mastrangeli	5/22/2025		
FM	Ask Recovered Energy to replace missing base on the streetlight damaged in last year's hurricane & adjust misaligned bases when completing the grounding project	5/22/2025		
FM	Notify Mr. Wolski of streetlight count	5/22/2025		
FM	Explore no trespassing signs for village 4	4/24/2025		
FM	St John's River water management company signs	4/24/2025		Required but not provided by SJRWMD
FM	Carl would like a no fishing sign on pond 3	4/24/2025		
FM	Evaluate monument condition and obtain repair quotes	10/28/2024		2/27/2025 Proposal request for pressure washing curbs & monuments & monument repairs
FM	Order no overnight parking signs for playground	8/22/2024		10/10 Apex contacted for quote 10/28 Follow up on no parking signs at playground & order 10 No fishing signs for village 3 and fountain pond 12/30 Follow up on style selection approval
FM	Include monuments / lighting and district signage on field report	8/22/2024		
FM	Re-document recent sidewalk repairs for both safety and aesthetics.	6/27/2024		
DTE	Connect with Brightview to discuss shared irrigation and schedules	5/22/2025		
DTE	Address missed section of CDD landscape on Blazing Star	5/22/2025		
DTE	Proposal for irrigation at ponds for budget discussion	3/27/2025		Pond 12 - trees & irrigation

Avalon Groves – Outstanding Action Items FY 2025
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Assigned To:	Assignment	Date Assigned	Date Completed	Notes
DTE	Report and proposal for the repairs and landscape replacement affected by the absence of the irrigation mainline	2/27/2025	Ongoing	Still waiting on KB contractor to set a schedule. 3/26/25 Phase 1 recovery proposal provided.
Steadfast	Attend the next meeting, provide material for residents	7/24/2025		
Board	Send staff edits on Wetland Conservation Communication	4/24/2025		
TICKLER - FUTURE DISCUSSIONS & CAPITAL IMPROVEMENT PROJECTS (BUDGET CONSIDERATIONS)				
BUDGET	Pond Erosion	5/15/2025		Review with DE annual report
BUDGET	Edgemont & Village 1 Outlets and Monument Lighting	5/15/2025		A) Klinger Electrical Services - $47,111.00 B) TPG Lighting - $68,665.20
BUDGET	Monument Solar Lighting	5/15/2025		A) Mr. Electric Monument Lighting Repair - $2,5650.00 B) TPG Lighting - $32,049.60
BUDGET	Landscape Replenishment	5/15/2025		Irrigation Around Ponds Tree Replacement Around Ponds Sawgrass Bay Blvd Beds Down To Earth Proposal #116725 - Sawgrass Bay Blvd Palms Replacements - $6,359.71
BUDGET	KB Homes - Replenishment Due to Irrigation Damage	5/15/2025		Sawgrass Bay Blvd Beds Down To Earth Proposal #114231 for Sod Replacement at Sawgrass Bay Blvd. Median (Sanctuary Irrigation Landscape Replacement Phase 1) - $24,731.77