

**EPPERSON RANCH II
COMMUNITY DEVELOPMENT DISTRICT**

FINAL AGENDA PACKAGE

**Thursday, August 7, 2025, at 6:00 p.m.
Meeting to be held at:**

**Watergrass 2 Club
32711 Windelstraw Dr.,
Wesley Chapel, Florida 33545**



313 Campus Street
Celebration, FL 34747
(813) 652-2454

Epperson Ranch II Community Development District

Board of Supervisors

Joseph Murphy, Chairman
Michele Frank, Vice Chairman
Miguel Casellas-Gil, Assistant Secretary
Michael Lawson, Assistant Secretary
Doug Draper, Assistant Secretary

Staff:

Kristee Cole, District Manager
Vasili Kostakis, District Engineer
Jere Earlywine, District Counsel
Shane Wumkes, Fieldstone
Kevin Riemensperger, Steadfast Alliance
Paul Young, Inframark

Meeting Agenda Thursday, August 7, 2025 – 6:00 p.m.

1. **Call to Order and Roll Call**
2. **Adoption of the Agenda**
3. **Audience Comments on Agenda Items – Three- (3) Minute Time Limit**
4. **Business Administration**
 - A. Consideration of the Regular Meeting Minutes of July 3, 2025..... Page 3
 - B. Review of the June 2025 Check Register Page 6
5. **Staff Reports**
 - A. Aquatic Maintenance Report Page 7
 1. Consideration of Pond 7 Fountain 1 Motor Pump Replacement Proposal Page 15
 - B. Field Inspection Report..... Page 16
 - C. Landscape Update
 - D. District Counsel
 1. Consideration of Beacon Epperson Pool Temporary Access Agreement..... Page 31
 - E. District Engineer
 1. Presentation of Ownership and Maintenance Map Page 39
 - F. District Manager
6. **Business Items**
 - A. Public Hearing on the Fiscal Year 2025-2026 Final Budget
 1. Consideration of Resolution 2025-08, Adopting the Fiscal Year 2025-2026 Final Budget Page 40
 - B. Public Hearing on Levying the O&M Assessment
 1. Consideration of Resolution 2025-09, Levying the O&M Assessment..... Page 48
 - C. Consideration of Resolution 2025-10, Adopting the Fiscal Year 2025-2026 Meeting Schedule Page 52
 - D. Consideration of Resolution 2025-11, Adopting the Goals and Objectives Page 54
 - E. Consideration of Reserve Study Proposals Page 59
 - F. Discussion Regarding Street Parking..... Page 88
 - G. Consideration of Meadow Ridge- Phase C Bill of Sale..... Page 89
7. **Audience Comments**
8. **Supervisor Requests**
9. **Adjournment**

The next meeting is scheduled for Thursday, September 4, 2025.

[Join the meeting now](#)

Meeting ID: 271 348 956 348 7

Passcode: Ae94Hw6G

Dial in by phone

[+1 646-838-1601](tel:+16468381601),942797931# United States, New York City

Phone conference ID: 942 797 931#

District Office:

313 Campus Street
Celebration FL 34747
<https://www.eppersonranch2cdd.org/>

Meeting Location:

Watergrass 2 Club
32711 Windelstraw Dr.,
Wesley Chapel, FL 33545

**MINUTES OF MEETING
EPPERSON RANCH II
COMMUNITY DEVELOPMENT DISTRICT**

The Regular Meeting of the Board of Supervisors of the Epperson Ranch II Community Development District was held on Thursday, July 3, 2025 at 6:00 p.m. at Watergrass 2 Club., 32711 Windelstraw Dr., Wesley Chapel, Florida, 33545.

FIRST ORDER OF BUSINESS – Roll Call

Ms. Cole called the meeting to order at 6:00 p.m. and conducted roll call.

Present and constituting a quorum were:

Joseph Murphy	Board Supervisor, Chairman
Michele Frank	Board Supervisor, Vice Chairman
Doug Draper	Board Supervisor, Assistant Secretary (via Teleconference)
Michael Lawson	Board Supervisor, Assistant Secretary (via Teleconference)
Miguel Casellas-Gil	Board Supervisor, Assistant Secretary

Also present were:

Kristee Cole	District Manager, Inframark
Alize Aninipot	District Manager, Inframark
Paul Young	Field Services, Inframark
Jere Earlywine	District Counsel, KutakRock (via Teleconference)
Kyle Magee	District Counsel, KutakRock
Vasili Kostakis	District Engineer, Stantec (via Teleconference)
Shane Wumkes	Representative, Fieldstone (via Teleconference)

SECOND ORDER OF BUSINESS

Adoption of the Agenda

On a MOTION by Ms. Frank, SECONDED by Mr. Casellas-Gil, WITH ALL IN FAVOR, the Board Approved the July 3, 2025, Final Agenda for the Epperson Ranch II Community Development District.

THIRD ORDER OF BUSINESS

Audience Comments

A resident asked for clarity regarding the proposed budget.

FOURTH ORDER OF BUSINESS

Business Administration

A. Consideration of the Regular Meeting Minutes of June 5, 2025

On a MOTION by Mr. Casellas-Gil, SECONDED by Mr. Murphy, WITH ALL IN FAVOR, the Board approved Regular Meeting Minutes of July 3, 2025, for the Epperson Ranch II Community Development District.

B. Consideration of May 2025 Financials and Check Register

On a MOTION by Mr. Murphy, SECONDED by Mr. Lawson, WITH ALL IN FAVOR, the Board **approved the May 2025 Financials** for the Epperson Ranch II Community Development District.

FIFTH ORDER OF BUSINESS

Staff Reports

A. Aquatic Maintenance Report

The Board would like all ponds to be in the reports going forward.

1. Consideration of Pond 8 Fountain Repair Proposal

Table until the October meeting.

B. Field Inspection Report

Mr. Young presented his report and noted that Steadfast has been actively cleaning out the ponds. Mr. Casellas-Gil observed that the weeds within the entrance plant beds require trimming. Additionally, it was reported that a street sign is down on Bower Bass and needs to be addressed.

Mr. Murphy will take the lead on reviewing the landscape near Metro Lagoon to assess and document any landscape damage.

The Board approved the proposal from Mike Signs for the installation of hearing-impaired signage in front of Abby Brooks Circle.

On a MOTION by Mr. Murphy, SECONDED by Ms. Frank, WITH ALL IN FAVOR, the Board **approved the Mike Signs proposal for the hearing-impaired signage**, for the Epperson Ranch II Community Development District.

1. Consideration of Dog Fence Repair Proposal

On a MOTION by Mr. Murphy, SECONDED by Mr. Casellas-Gil, WITH ALL IN FAVOR, the Board Appointed Ms. Frank as the liaison and approved the revised Dog Fence Repair Proposal outside of a meeting, with it being under the spending threshold of \$5,000, for the Epperson Ranch II Community Development District.

C. Landscape Update

Mr. Wumkes will address the weeds on Wednesday. He mentioned item #10 will be addressed on Wednesday.

On a MOTION by Ms. Frank, SECONDED by Mr. Murphy, WITH ALL IN FAVOR, the Board **approved Proposal #21492 from Fieldstone**, for the Epperson Ranch II Community Development District.

The palm pruning is scheduled for the 23rd or 24th.

On a MOTION by Ms. Frank, SECONDED by Mr. Murphy, WITH ALL IN FAVOR, the Board authorize Fieldstone to work with Mr. Casellas-Gil on the revised proposal for enhancements and much, for the Epperson Ranch II Community Development District.

The Board was informed that the Elam Road connection is still in progress.

It was noted that there are still utility pipes protruding from the ground, and Metro has contracted Site Master to address these areas. The Board further stated that a maintenance map must be provided prior to the next Board meeting.

Ms. Cole informed the Board that the next meeting will be held on August 7, 2025, and this will be the meeting where they adopt the budget.

A. Consideration of Fiscal Year 2024 Final Audit

On a MOTION by Mr. Murphy, SECONDED by Mr. Casellas-Gil, WITH ALL IN FAVOR, the Board accepted the Fiscal Year 2023-2024 Final Audit for the Epperson Ranch II Community Development District.

Ms. Sowani and Ms. Cole presented the budget to the Board and members of the audience, addressing and responding to all questions raised.

The residents requested a CDD 101 meeting for the November 2025 meeting.

Mr. Casellas-Gil discussed several items, including the gates at the DRB townhomes, the Meadow Ridge cost share, the free library, and the Beacon contract with the District.

Mr. Murphy noted that he would like to begin making adjustments to the District's website to allow residents better visibility into community activities and updates.

On a MOTION by Mr. Murphy, SECONDED by Ms. Frank, WITH ALL IN FAVOR, the Board **adjourned the meeting at 8:19 p.m.** for the Epperson Ranch II Community Development District.

EPPERSON RANCH II COMMUNITY DEVELOPMENT DISTRICT

Payment Register by Fund

For the Period from 06/01/2025 to 06/30/2025

(Sorted by Check / ACH No.)

Fund No.	Check / ACH No.	Date	Payee	Invoice No.	Payment Description	Invoice / GL Description	G/L Account #	Amount Paid
GENERAL FUND - 001								
001	1013	06/04/25	STANTEC CONSULTING SERVICES, INC.	2393038	District Engineer	ProfServ-Engineering	531013-51301	\$1,213.03
001	1014	06/04/25	GIG FIBER, LLC	4416	solar lights	Utility - StreetLights	543062-53908	\$1,905.50
001	1014	06/04/25	GIG FIBER, LLC	4412	STREET LIGHTS	Utility - StreetLights	543062-53908	\$1,133.00
001	1014	06/04/25	GIG FIBER, LLC	4413	STREET LIGHTS	Utility - StreetLights	543062-53908	\$875.50
001	1014	06/04/25	GIG FIBER, LLC	4414	STREET LIGHTS	Utility - StreetLights	543062-53908	\$772.50
001	1014	06/04/25	GIG FIBER, LLC	4415	STREET LIGHTS	Utility - StreetLights	543062-53908	\$721.00
001	1016	06/04/25	FIELDSTONE LANDSCAPE SERVICES, LLC	25318	Irrigation repair 4/23/25	IRR REPAIRS	546179-53908	\$277.20
001	1016	06/04/25	FIELDSTONE LANDSCAPE SERVICES, LLC	25177	Landscape Maintenance - April 2025	landscape maintenance	546300-53908	\$20,430.00
001	1016	06/04/25	FIELDSTONE LANDSCAPE SERVICES, LLC	25559	Irrigation repair 5/21/25	IRR REPAIRS	546179-53908	\$500.00
001	1016	06/04/25	FIELDSTONE LANDSCAPE SERVICES, LLC	25108	Irrigation repairs 3/31/25	IRR REPAIRS	546179-53908	\$2,905.00
001	1016	06/04/25	FIELDSTONE LANDSCAPE SERVICES, LLC	25423	Landscape maintenance May 25	landscape maintenance	546300-53908	\$20,430.00
001	1016	06/04/25	FIELDSTONE LANDSCAPE SERVICES, LLC	24713	Landscape maintenance Feb 2025	landscape maintenance	546300-53908	\$20,430.00
001	1016	06/04/25	FIELDSTONE LANDSCAPE SERVICES, LLC	25109	Irrigation repair 3/31/25	IRR REPAIRS	546179-53908	\$500.00
001	1016	06/04/25	FIELDSTONE LANDSCAPE SERVICES, LLC	25651	Landscape maintenance June 2025	landscape maintenance	546300-53908	\$20,430.00
001	1019	06/11/25	WATERGRASS CDD II	01389	Meeting room 6/5/25	meeting room	544004-51301	\$125.00
001	1020	06/11/25	WITHLACOOCHEE RIVER ELECTRIC	040825 4992	PUBLIC LIGHTING	Utility - Electric	543041-53908	\$2,794.02
001	1021	06/11/25	IPFS CORPORATION	060625 GAA-D60758	Insurance Balance Payoff FY2025	insurance	545020-53908	\$13,686.85
001	1022	06/30/25	FIELDS CONSULTING GROUP, LLC	3510	Signage Repairs	signage	549900-53908	\$750.00
001	1023	06/30/25	FIELDSTONE LANDSCAPE SERVICES, LLC	25831	IRRIGATION REPAIRS	IRR REPAIRS	546179-53908	\$518.81
001	1024	06/30/25	MIKE FASANO	061625	Postage Assessments	collection costs	549070-53908	\$209.51
001	1025	06/30/25	INFRAMARK (DE), LLC	152226	June 2025 District Management, Field Services, Dissemination Services and Assessment Services	Dissemination Services	531012-51301	\$666.67
001	1025	06/30/25	INFRAMARK (DE), LLC	152226	June 2025 District Management, Field Services, Dissemination Services and Assessment Services	Field Services	534163-53908	\$1,250.00
001	1025	06/30/25	INFRAMARK (DE), LLC	152226	June 2025 District Management, Field Services, Dissemination Services and Assessment Services	District Management	531027-51301	\$5,666.67
001	1025	06/30/25	INFRAMARK (DE), LLC	152226	June 2025 District Management, Field Services, Dissemination Services and Assessment Services	assessment roll	549070-51301	\$416.67
001	1026	06/30/25	COOPER POOLS, INC.	2025-206	FOUNTAIN SERVICE 03/25	fountain maintenance	546472-53908	\$450.00
001	1026	06/30/25	COOPER POOLS, INC.	2025-528	FOUNTAIN SERVICE 05/25	fountain maintenance	546472-53908	\$450.00
001	1026	06/30/25	COOPER POOLS, INC.	2025-342	FOUNTAIN SERVICE 04/25	fountain maintenance	546472-53908	\$450.00
001	1026	06/30/25	COOPER POOLS, INC.	2025-691	Fountain Maintenance June 2025	fountain maintenance	546472-53908	\$450.00
001	1027	06/30/25	BREEZE CONNECTED, LLC	20324	management contract	MANAGEMENT FEE	531027-51301	\$1,666.67
001	1028	06/30/25	WATERGRASS CDD II	011682	MEETING ROOM RENTAL	Rental - Meeting Room	544004-51301	\$125.00
Fund Total								\$122,198.60

Total Checks Paid \$122,198.60



Epperson Ranch II CDD Aquatics

Inspection Date:

7/30/2025 11:28 AM

Prepared by:

Matt Goldrick

Account Manager

STEADFAST OFFICE:

WWW.STEADFASTENV.COM
813-836-7940

Inspection Report

SITE: 1/2

Condition: Excellent Great Good ✓Poor ✓Mixed Condition Improving



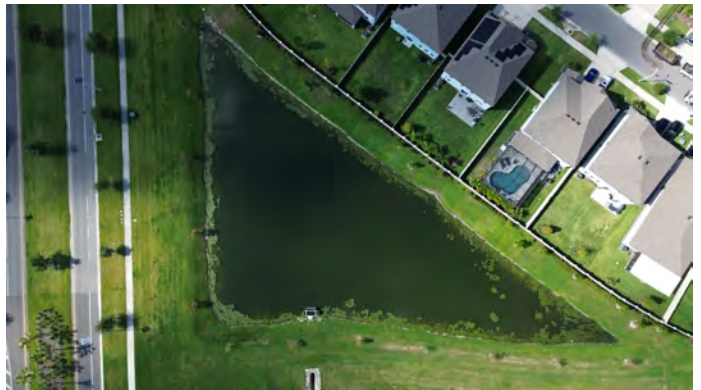
Comments:

Moderate planktonic algae coverage on both ponds. Pond 2 also has patches of filamentous algae growth. Most ponds on property is scheduled for a heavy algaecide treatment next visit. Couple this with daily rain events, and algae growth should greatly reduce in the coming weeks. No nuisance grass growth observed on either pond.

<u>WATER:</u>	<input checked="" type="checkbox"/> Clear	Turbid	Tannic
<u>ALGAE:</u>	N/A	Subsurface Filamentous	<input checked="" type="checkbox"/> Surface Filamentous
		<input checked="" type="checkbox"/> Planktonic	Cyanobacteria
<u>GRASSES:</u>	<input checked="" type="checkbox"/> N/A	Minimal	Moderate
<u>NUISANCE SPECIES OBSERVED:</u>			Substantial
	Torpedo Grass	Pennywort	Babytears
	Hydrilla	Slender Spikerush	Other: Chara

SITE: 3/4

Condition: Excellent Great Good ✓Poor Mixed Condition Improving



Comments:

Both ponds have filamentous algae growth around the perimeter. Pond 3 has a small patch of planktonic as well. The upcoming algae treatment will begin to clear both types of growth quickly. Nuisance grasses will also be addressed at that time.

<u>WATER:</u>	<input checked="" type="checkbox"/> Clear	Turbid	Tannic
<u>ALGAE:</u>	N/A	Subsurface Filamentous	<input checked="" type="checkbox"/> Surface Filamentous
		<input checked="" type="checkbox"/> Planktonic	Cyanobacteria
<u>GRASSES:</u>	N/A	<input checked="" type="checkbox"/> Minimal	Moderate
<u>NUISANCE SPECIES OBSERVED:</u>			Substantial
	<input checked="" type="checkbox"/> Torpedo Grass	Pennywort	Babytears
	Hydrilla	Slender Spikerush	Other: Primrose

Inspection Report

SITE: 5

Condition: Excellent Great ✓Good Poor Mixed Condition Improving



Comments:

Mild filamentous algae and nuisance grass growth present in the larger, eastern section. The shallow sections are prone to rapid growth, but have remained relatively free of any this month. Both sides will be treated for any nuisance growth during the next maintenance event.

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

SITE: 6/7

Condition: Excellent ✓Great Good Poor Mixed Condition Improving



Comments:

Pond 6 is has mild nuisance growth around the buffer zone, mainly dog fennel. Any filamentous algae present on pond 7 is decaying from a previous treatment. Technicians will ensure decay is progressing and re-treat if necessary. Nuisance grasses will also be addressed at that time.

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

Inspection Report

SITE: 8/9

Condition: Excellent Great Good Poor ✓ Mixed Condition Improving



Comments:

Pond 8 has filamentous algae growth gathering in one corner. This typically means it is decaying and being pushed by wind. A technician will address it next visit if rain has not cleared the growth.

Pond 9 has a small ring of decaying filamentous algae around the perimeter, and patches of planktonic algae and cyanobacteria. These will all be treated during the upcoming maintenance event.

Nuisance grasses will also be addressed at that time.

<u>WATER:</u>	<input checked="" type="checkbox"/> Clear	Turbid	Tannic
<u>ALGAE:</u>	N/A	Subsurface Filamentous	<input checked="" type="checkbox"/> Surface Filamentous
		<input checked="" type="checkbox"/> Planktonic	<input checked="" type="checkbox"/> Cyanobacteria
<u>GRASSES:</u>	N/A	<input checked="" type="checkbox"/> Minimal	Moderate Substantial
<u>NUISANCE SPECIES OBSERVED:</u>			
Torpedo Grass	Pennywort	Babytears	Chara
Hydrilla	Slender Spikerush	Other:	

SITE: 10/11

Condition: Excellent Great Good ✓ Poor ✓ Mixed Condition Improving



Comments:

Both ponds have filamentous algae growth around the perimeter. Pond 11 also has moderate planktonic coverage. Next visit's treatments will begin to clear both algal bloom.

Nuisance grasses will also be addressed at that time.

<u>WATER:</u>	<input checked="" type="checkbox"/> Clear	Turbid	Tannic
<u>ALGAE:</u>	N/A	Subsurface Filamentous	<input checked="" type="checkbox"/> Surface Filamentous
		<input checked="" type="checkbox"/> Planktonic	Cyanobacteria
<u>GRASSES:</u>	N/A	<input checked="" type="checkbox"/> Minimal	Moderate Substantial
<u>NUISANCE SPECIES OBSERVED:</u>			
<input checked="" type="checkbox"/> Torpedo Grass	Pennywort	Babytears	Chara
Hydrilla	Slender Spikerush	Other: Primrose	

Inspection Report

SITE: 12/13

Condition: Excellent Great ✓Good Poor Mixed Condition Improving



Comments:

Both ponds have filamentous algae growth around the perimeter. Pond 13 appears to have a planktonic bloom starting. Catching algal growth at these stages will yield good results and begin clearing the ponds quickly. Nuisance grasses will also be addressed during the next maintenance event.

<u>WATER:</u>	<input checked="" type="checkbox"/> Clear	Turbid	Tannic
<u>ALGAE:</u>	N/A	Subsurface Filamentous	<input checked="" type="checkbox"/> Surface Filamentous
		<input checked="" type="checkbox"/> Planktonic	Cyanobacteria
<u>GRASSES:</u>	N/A	<input checked="" type="checkbox"/> Minimal	Moderate
<u>NUISANCE SPECIES OBSERVED:</u>			Substantial
	Torpedo Grass	<input checked="" type="checkbox"/> Pennywort	Babytears
	Hydrilla	Slender Spikerush	Other:
			Chara

SITE: 14/15

Condition: Excellent Great Good ✓Poor Mixed Condition Improving



Comments:

Minimal filamentous algae coverage on pond 14 and no nuisance grass growth. Pond 15 has more notable filamentous coverage and a possible planktonic bloom. Both ponds will be included in the upcoming heavy algacide treatments.

<u>WATER:</u>	<input checked="" type="checkbox"/> Clear	Turbid	Tannic
<u>ALGAE:</u>	N/A	Subsurface Filamentous	<input checked="" type="checkbox"/> Surface Filamentous
		<input checked="" type="checkbox"/> Planktonic	Cyanobacteria
<u>GRASSES:</u>	<input checked="" type="checkbox"/> N/A	Minimal	Moderate
<u>NUISANCE SPECIES OBSERVED:</u>			Substantial
	Torpedo Grass	Pennywort	Babytears
	Hydrilla	Slender Spikerush	Other:
			Chara

Inspection Report

SITE: 16/17

Condition: Excellent Great Good Poor ✓ Mixed Condition Improving



Comments:

Pond 16 has filamentous algae growth around the perimeter. Technicians will address this during the next visit.
Pond 17 is relatively free of any nuisance growth. A technician will inspect and treat if needed.

<u>WATER:</u>	<input checked="" type="checkbox"/> Clear	Turbid	Tannic
<u>ALGAE:</u>	N/A	Subsurface Filamentous	<input checked="" type="checkbox"/> Surface Filamentous
		Planktonic	Cyanobacteria
<u>GRASSES:</u>	N/A	<input checked="" type="checkbox"/> Minimal	Moderate
			Substantial
<u>NUISANCE SPECIES OBSERVED:</u>			
	<input checked="" type="checkbox"/> Torpedo Grass	Pennywort	Babytears
	Hydrilla	Slender Spikerush	Other:
			Chara

SITE:

Condition: Excellent Great Good Poor Mixed Condition Improving

Comments:

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

MANAGEMENT SUMMARY



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, one of two things can happen. Water will push more nutrients into the pond from residential fertilizer and lawn runoff. Or the pond's appearance will improve dramatically as algae is pelted down after treatment and fill ponds, circulate water, and reset the pond's biology. The latter is always preferred, but technicians are prepared if the former does occur.

During today's visit, most ponds are in need of attention. Growing conditions in summer create a constant battle between technicians and algae. As mentioned above, the next visit will mainly consist of algacide focused treatments to begin clearing the ponds. Shoreline gasses are at a minimum and will continue to be monitored and treated.

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!

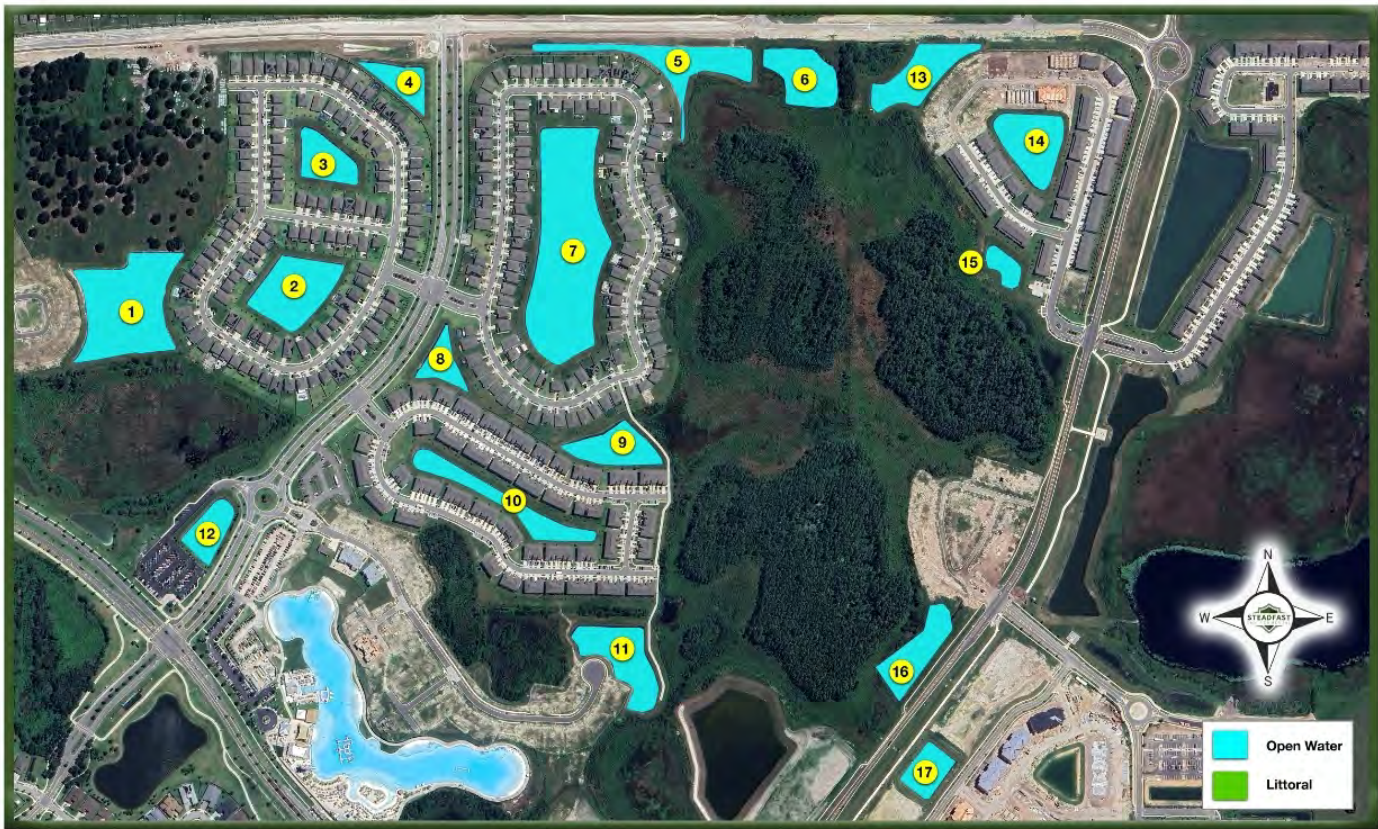
MAINTENANCE AREA



EPPERSON RANCH II CDD

Epperson Boulevard, Wesley Chapel

Gate Code:





Steadfast Alliance
30435 Commerce Drive
Suite 102
San Antonio FL 33576 US

ESTIMATE

DATE	DUE	ESTIMATE #
7/31/2025	8/30/2025	

BILL TO

Epperson Ranch II CDD
1540 International P
Lake Mary FL 32746

SHIP TO

DESCRIPTION	QTY	RATE	AMOUNT
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Scope: Purchase & install 5hp Grundfos motor, deluxe start box, and 400' of submersible motor cable for Fountain #1 in Epperson II CDD (pond 7, Bower Bass Circle).

Unit & control box recently diagnosed. Thermal overload previously removed during electrical service found that the start box has overloaded and was stuck. Motor and cable tested and both determined to be compromised & in need of replacement.	1.00	8,795.00	8,795.00
--	------	----------	----------

Warranty: 2 year from install date.

I HEREBY CERTIFY that I am the Client/Owner of record of the property which is the subject of this proposal and hereby authorize the performance of the services as described herein and agree to pay the charges resulting thereby as identified above.

TOTAL	8,795.00
--------------	-----------------

I warrant and represent that I am authorized to enter into this Agreement as Client/Owner.

Accepted this _____ day of _____, 20____.

Signature: _____

Printed Name and Title: _____

Representing (Name of Firm): _____

Paul Young
District Field Inspector

EPPERSON RANCH II CDD

Field Inspection Report - July - Fieldstone

Friday, July 18, 2025

Prepared For Board of Supervisors

23 Items Identified

Green - Completed

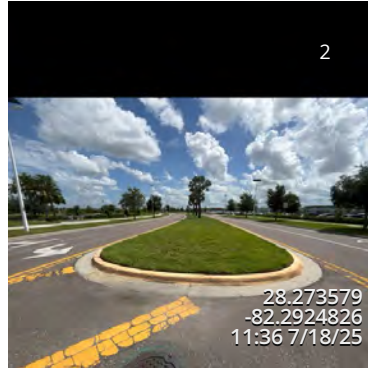
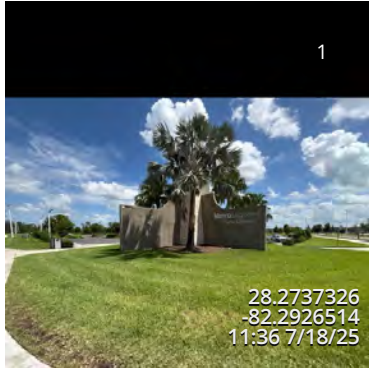
Red - Item has not been addressed

Orange - Monitoring / In progress

ITEM 1 - EPPERSON BLVD ENTRANCE

Assigned To: Fieldstone

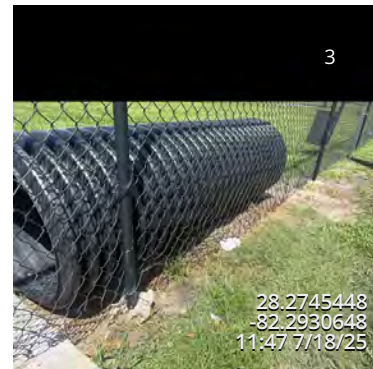
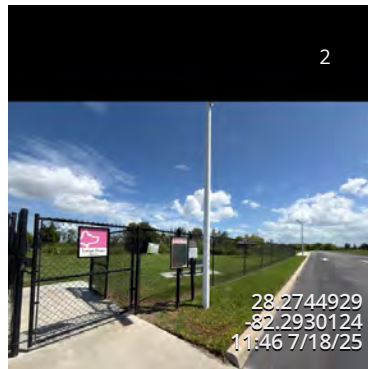
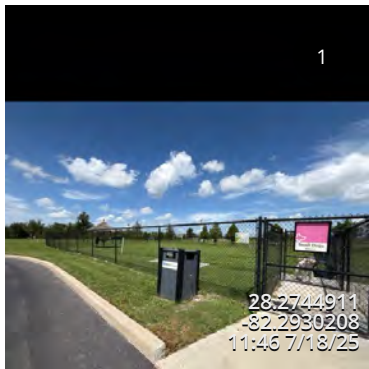
- 1). West entrance sign - Fieldstone has an approved proposal to trim Palms - **completed**
- 2). Center median is serviced by Fieldstone.
- 3). East entrance sign - **maintain weed control during every service visit.**



ITEM 2 - DOG PARK

Assigned To: Fieldstone

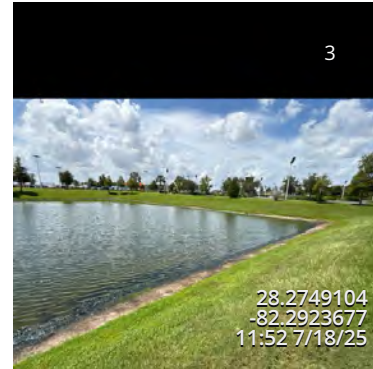
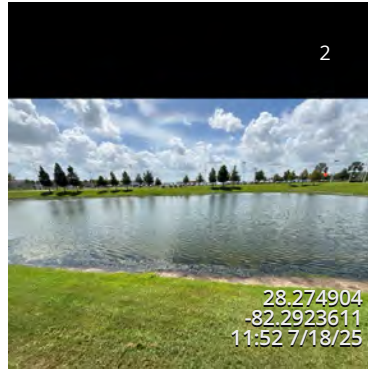
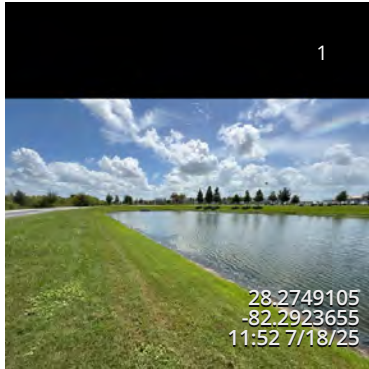
- 1) Small dog park is **well maintained.**
- 2). Large dog park is **well maintained.**
- 3). Dog park fence is **pending repair** - District



ITEM 3 - POND 12 - OVERFLOW LOT

Assigned To: Steadfast Aquatics

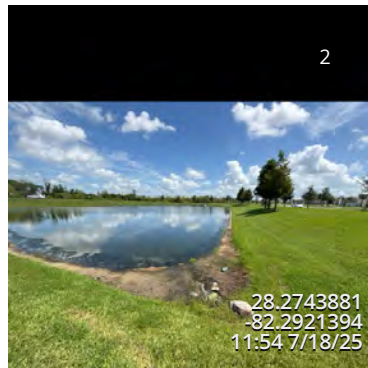
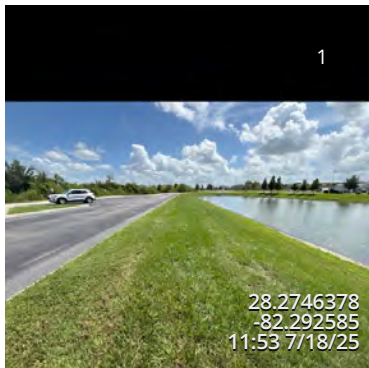
- 1). Algae forming and some trash is in the water - **scheduled**



ITEM 4 - POND 12 - BANK MOWING

Assigned To: Fieldstone

- 1). Bank mowing is **well maintained**.
- 2). Steadfast - remove trash along water's edge - **scheduled**
- 3). Fieldstone - remove dead tree - **scheduled**



ITEM 5 - EPPERSON BLVD ROUNDABOUT

Assigned To: Fieldstone

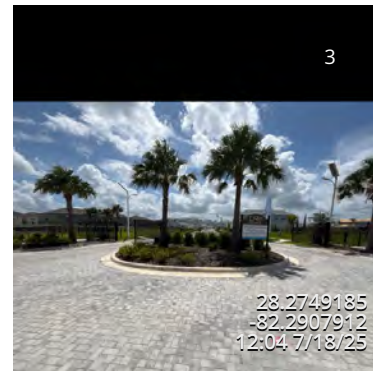
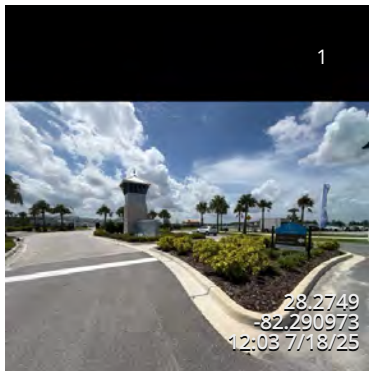
- 1). Epperson blvd north view - **well maintained.**
- 2). Center median is being serviced by Fieldstone.
- 3). Epperson blvd south view - **well maintained.**



ITEM 6 - ANCHOR POINT DRIVE

Assigned To: Fieldstone

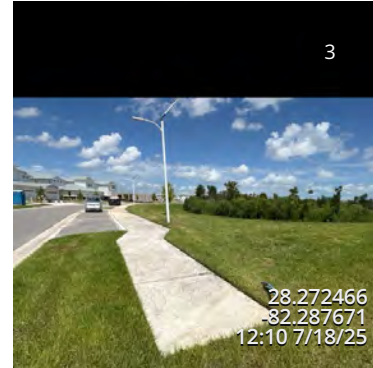
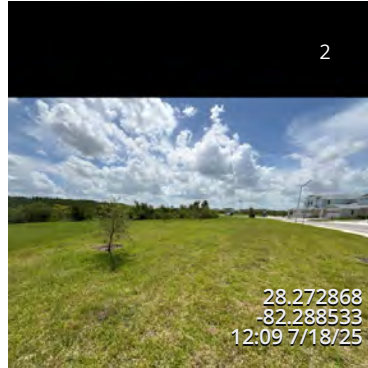
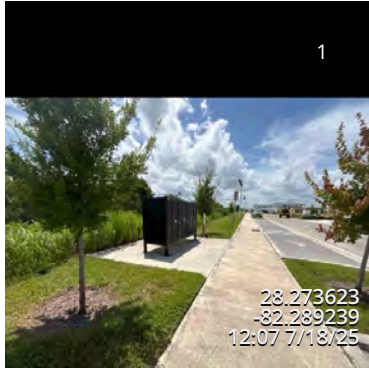
- 1). DRB Homes median bed - **scheduled**
- 2). Shape ligustrum trees - **scheduled**
- 3). Gate bed is **well maintained.**



ITEM 7 - BISCAYNE LAGOON LANE

Assigned To: Fieldstone

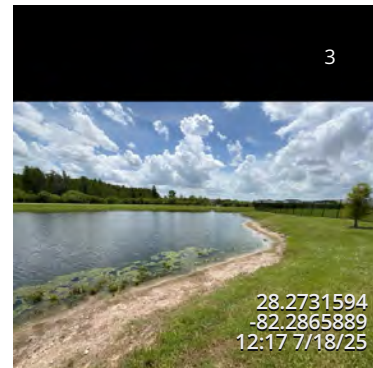
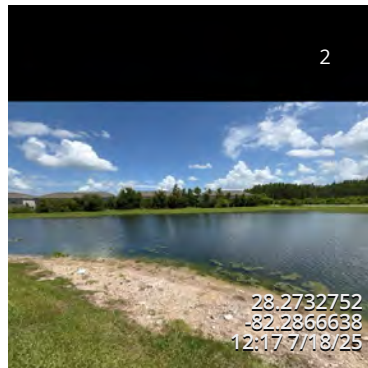
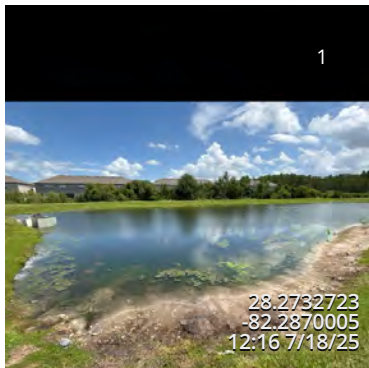
- 1). Mailbox is clean and orderly.
- 2). Stake leaning trees - **scheduled**.
- 3). CDD sidewalk is **well maintained**.



ITEM 8 - POND 11

Assigned To: Steadfast

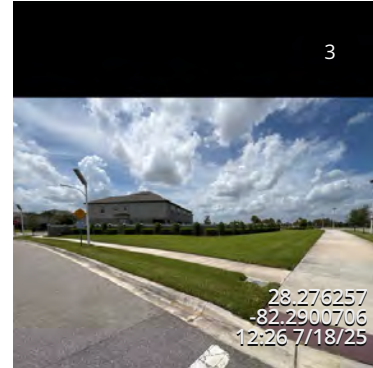
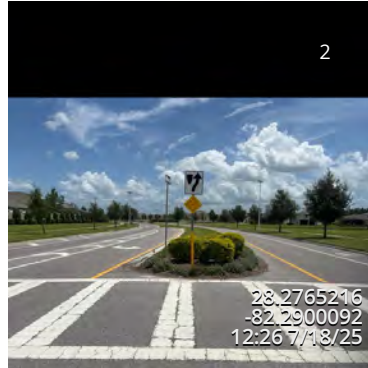
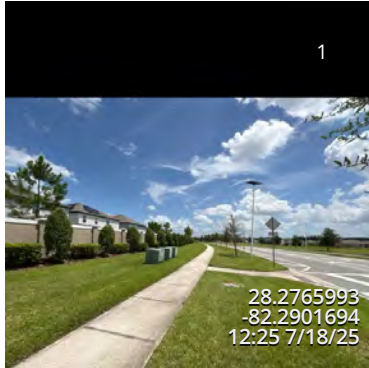
- 1). Pond 11 has algae forming on the edge - **scheduled**



ITEM 9 - N EPPERSON BLVD

Assigned To: Fieldstone

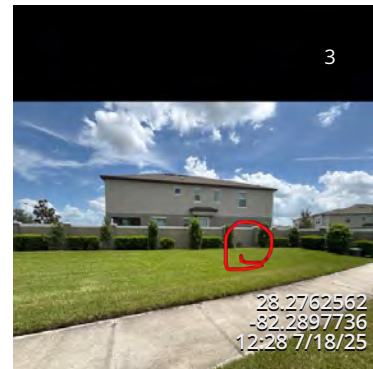
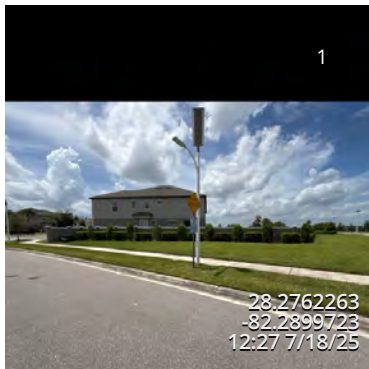
- 1). NE view is **well maintained**.
- 2). Center median well maintained - enhancement is **scheduled for week of 7/28-8/01**.
- 3). SE view is **well maintained**.



ITEM 10 - SEA AIR DRIVE ENTRANCE

Assigned To: Fieldstone

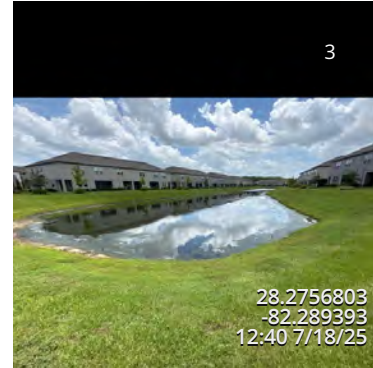
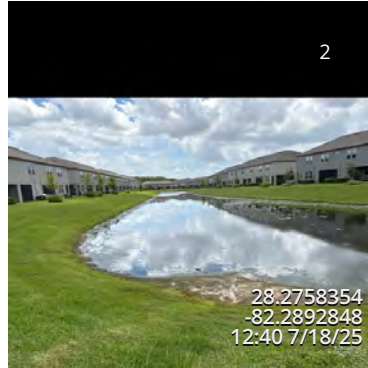
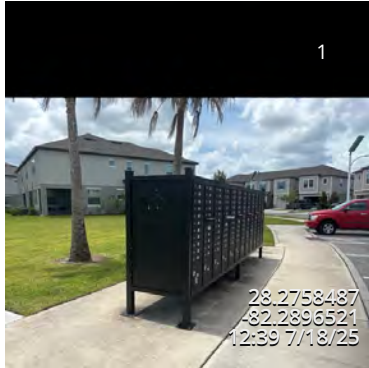
- 1). SE view is **well maintained**
- 2). Center median - continue weed control during service visits.
- 3). NE view - pull mingling weeds out of landscape - **scheduled**



ITEM 11 - BLUE PASSING LOOP

Assigned To: Steadfast

- 1). Mailbox kiosk is clean and orderly
- 2). Pond 10 has algae forming in the water's edge - **scheduled**

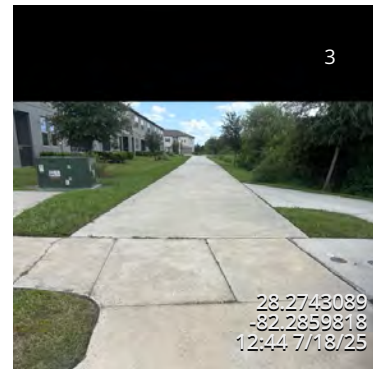
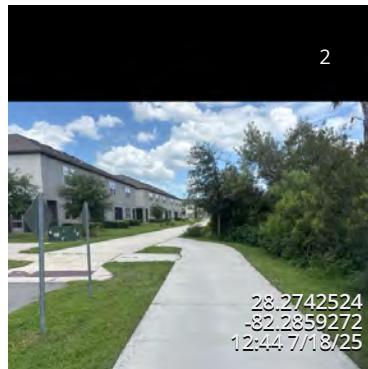
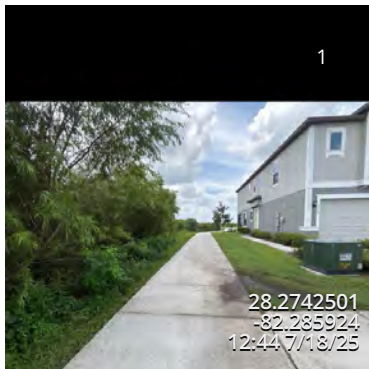


ITEM 12 - BLUE PASSING LOOP CART PARH

Assigned

To: Fieldstone

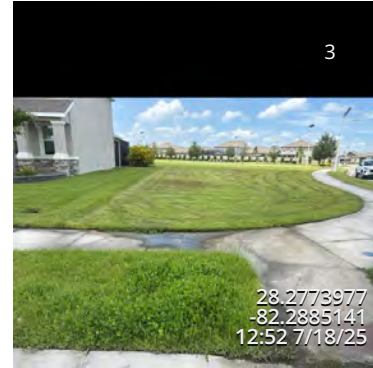
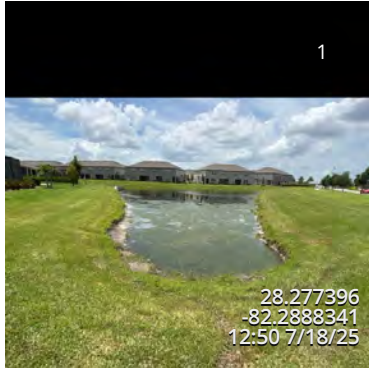
- 1). Path to Pond -(11)- is **well maintained**.
- 2). Cart path to Pond -(9)- is **well maintained**.
- 3). Treat crack weeds on next service visit - **scheduled**



ITEM 13 - BOWER BASS CIRCLE

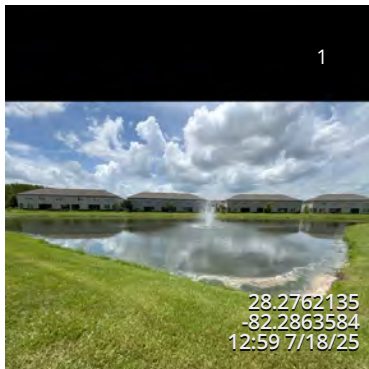
Assigned To: Fieldstone

- 1). Steadfast - Pond 8 has algae forming along the edges - **scheduled**
- 2). Entrance sod is saturated - **Fieldstone monitoring weed control.**
- 3). Line string corner if too wet for mowers weight - **completed**



ITEM 14 - POND 9 - BOWER BASS CIRCLE Assigned To: Fieldstone

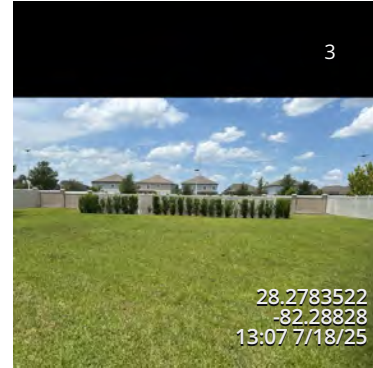
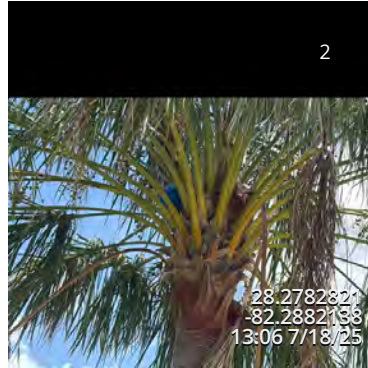
- 1). Pond 9 - **well maintained.**
- 2). Treat weeds at fountain power source - **scheduled**
- 3). Expose the edges of the CDD sidewalk - **scheduled**



ITEM 15 - BOWER BASS CIRCLE MAILBOX KIOSK

Assigned To: Fieldstone

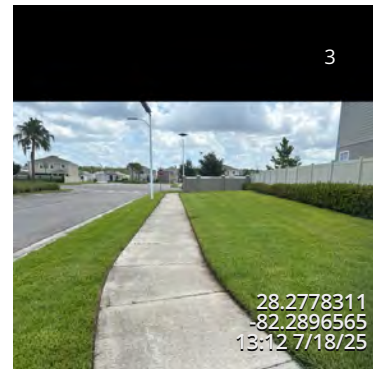
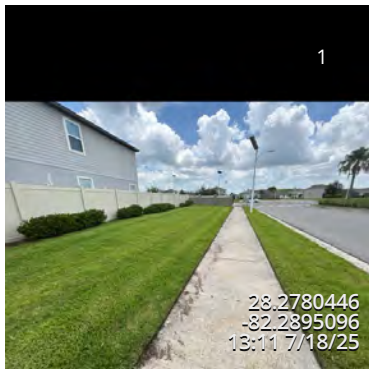
- 1). Mailboxes are clean and orderly.
- 2). Fieldstone will remove debris in Palms - **completed**
- 3). Sod is **well maintained**.



ITEM 16 - ABBY BROOK CIRCLE

Assigned To: Fieldstone

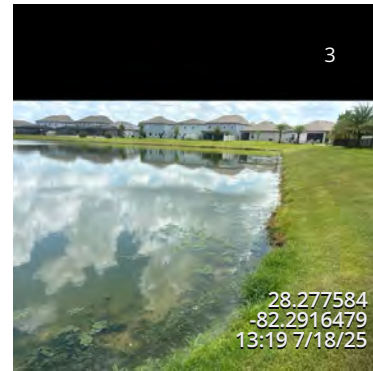
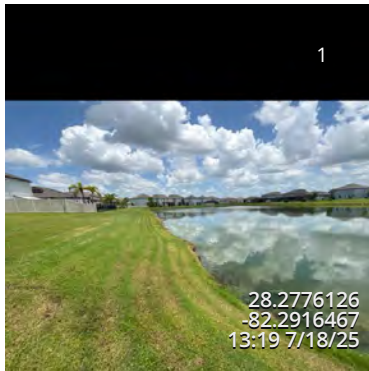
- 1). Entrance is **well maintained**
- 2). Continue to monitor weed control.
- 3). Treat crack weeds during service.



ITEM 17 - POND -2- ABBY BROOKS CIRCLE

Assigned To: Steadfast

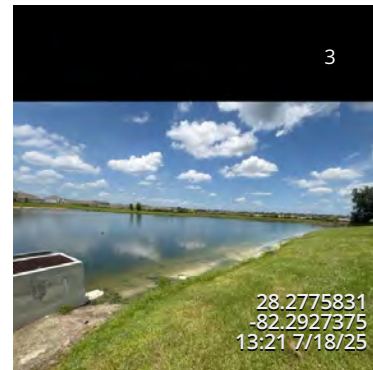
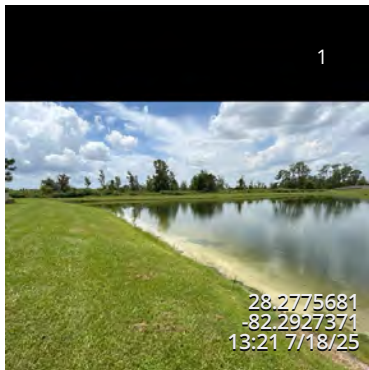
Algae forming on water's edge - **scheduled**



ITEM 18 - POND 1

Assigned To: Steadfast

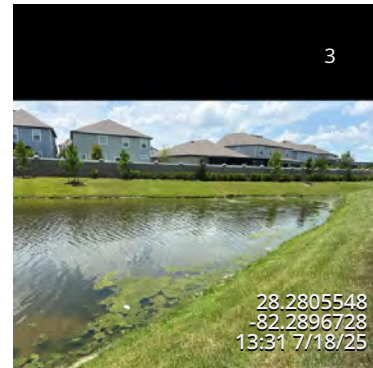
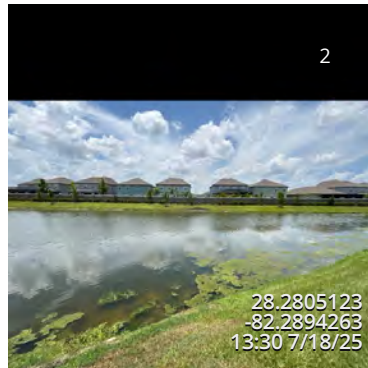
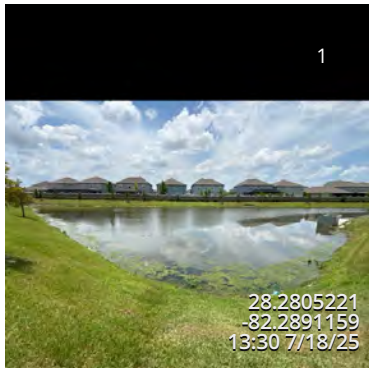
Pond 1 is **well maintained.**



ITEM 19 - EPPERSON BLVD POND 4

Assigned To: Steadfast

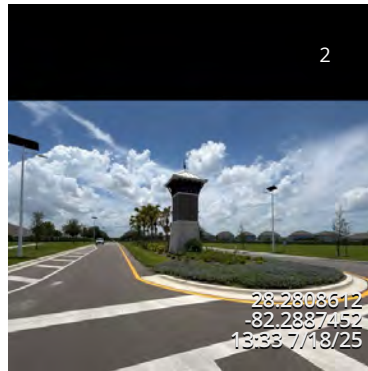
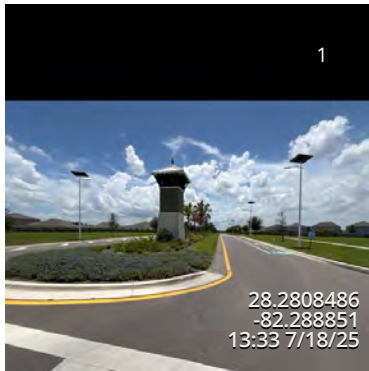
Algae forming on water's edge - **scheduled**



ITEM 20 - ELAM ROAD ENTRANCE

Assigned To: Fieldstone

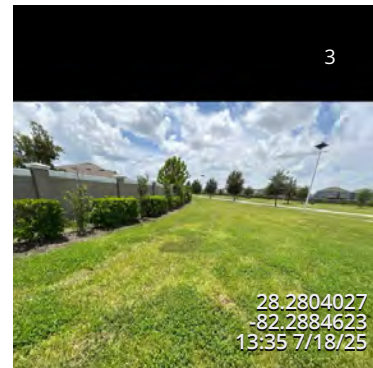
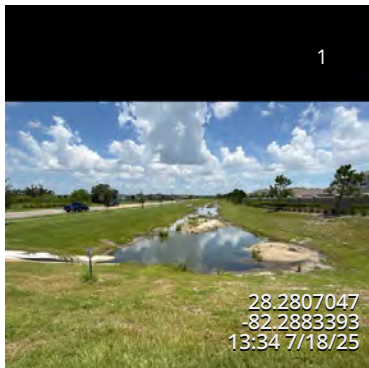
Entrance bed is **well maintained**.



ITEM 21 - POND 5

Assigned To: Fieldstone

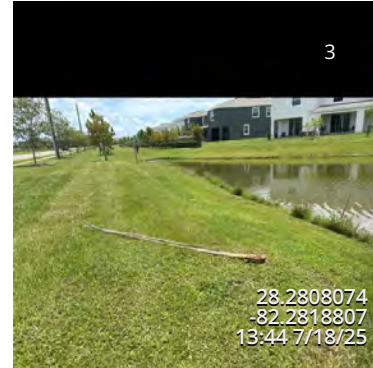
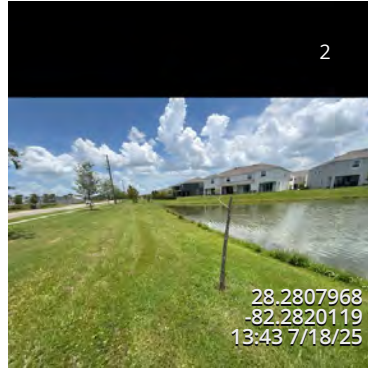
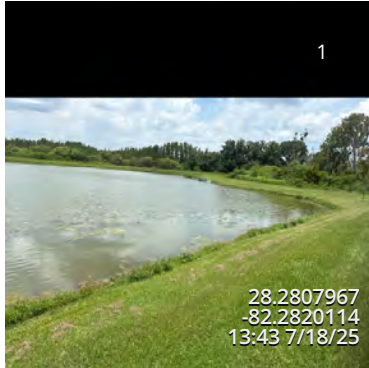
- 1). Steadfast - Water has receded and exposed growth is showing - **scheduled**
- 2). Fieldstone - Weed control along wall base - **scheduled**
- 3). Fieldstone - Sod has a lot of weeds - **scheduled**



ITEM 22 - POND 13

Assigned To: Fieldstone

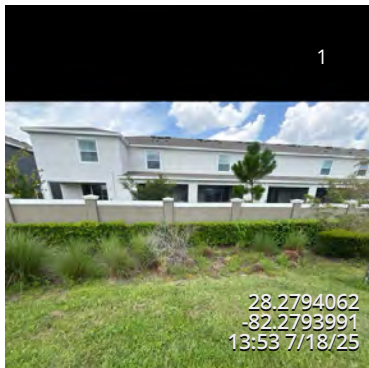
- 1). Pond 13 - **well maintained.**
- 2). Remove dead tree - **scheduled**
- 3). Remove fallen tree - **scheduled**



ITEM 23 - TURTLE GRACE LOOP

Assigned To: Fieldstone

Outside wall - **Fieldstone response on page 14.**



Fieldstone Responses

ITEM 1 - EPPERSON BLVD ENTRANCE

- 1). West entrance sign - Fieldstone has an approved proposal to trim Palms.
 - scheduled for 7/24

ITEM 4 - POND 12 - BANK MOWING

- 3). Fieldstone - remove dead tree.
 - spoke to Victor about starting some dead tree removals around the property over the next few visits. Will keep you updated on these.

ITEM 6 - ANCHOR POINT DRIVE

- 2). Shape ligustrum trees.
 - Will include in report to Victor and crew to complete

ITEM 7 - BISCAYNE LAGOON LANE

- 2). Stake leaning trees.
 - Will include in report to Victor and crew to complete

ITEM 9 - N EPPERSON BLVD

- 2). Center median well maintained - enhancement is scheduled for week of 7/21-7/25.
 - We had some weather issues recently so this is now tentatively scheduled for 7/28

ITEM 10 - SEA AIR DRIVE ENTRANCE

- 3). NE view - pull mingling weeds out of landscape.
 - Will do and we will have some replacement plants going in here next week I believe.

ITEM 12 - BLUE PASSING LOOP CART PARH

- 3). Treat crack weeds on next service visit.
 - Will include in report to Victor and crew to complete

ITEM 13 - BOWER BASS CIRCLE

- 2). Entrance sod is saturated - Fieldstone monitoring weed control.
 - Will treat this area again for turf weeds. It was treated but constant rain can delay and affect the success of the herbicide treatment.
- 3). Line string corner if too wet for mowers weight. Complete on next service visit.
 - Will add to report for Victor and crew

Fieldstone Responses Continued

ITEM 14 - POND 9 - BOWER BASS CIRCLE

- 2). Treat weeds at fountain power source.
 - Will add to report for Victor and crew
- 3). Expose the edges of the CDD sidewalk.
 - Will add to report for Victor and crew

ITEM 16 - ABBY BROOK CIRCLE

- 3). Treat crack weeds during service.
 - Will add to report for Victor and crew

ITEM 21 - POND 5

- 2). Weed control along wall base.
 - This is very labor intensive this time of year with the heat and soil moisture, especially without mulch in those beds to help regulate temperatures and suppress weed growth.
 - We plan to have much in shortly, but the Elam wall beds will be done at a different time. We removed the additional mulch from the estimate for budgetary reasons and sacrificed this area as it is a ton of mulch (wide beds), and far from the road/sidewalks... it is less visible than the other prioritized areas.
- 3). Sod has a lot of weeds.
 - Anthony to treat again next visit

ITEM 22 - POND -13

- 2). Remove dead tree.
 - Will add to report for Victor and crew
- 3). Remove fallen tree.
 - Will add to report for Victor and crew

ITEM 23 - TURTLE GRACE LOOP

- Outside wall - send scheduled date for servicing the landscape along the wall.
 - Needs immediate attention, will ask the crew to complete next service.
 - This is another area that can really benefit from some fresh mulch when the budget allows.

Steadfast Responses:

Item 3: Pond 12 algae forming & trash in water - Noted for the next service visit.

Item 4: Pond 12 trash along water's edge – Noted for the next service visit.

Item 8: Pond 11 algae forming on the edge – Noted for the next service visit.

Item 11: Pond 10 has algae forming in the water's edge – Noted for the next service visit.

Item 13: Pond 8 Algae forming - Noted for the next service visit.

Item 17: Pond 2 Algae forming on the water's edge - Noted for the next service visit.

Item 18: Pond 1 is well maintained – Thank you.

Item 19: Pond 4 algae is forming on water's edge – Noted for the next service visit.

Item 21: Pond 5 exposed growth – Noted for the next service visit.

Item 22: Pond 13 is well maintained – Thank you.

Additional Items:

Bower Bass Circle Fountains (Pond 7) – Electrician investigated the panels and found that the breakers controlling the lights are most likely tripping due to moisture entering the panel for the GFI.

Additionally, while onsite we discovered that the reset button for the Northern fountain had become stuck, which was causing the recent operation issues. It has been **disconnected for now. A proposal for repair is being assembled.**

Epperson Blvd Fountain (Pond 8) – A proposal for repair has been resubmitted.

TEMPORARY ACCESS AGREEMENT

This Temporary Access Agreement (“Access Agreement”) is made and entered into this 17th day of April 2025, by and between:

Epperson Ranch II Community Development District, a local unit of special-purpose government established pursuant to Chapter 190, *Florida Statutes*, being situated in Pasco County, Florida, and whose mailing address is 1540 International Parkway, Suite 2000, Lake Mary, FL 32746 (the “**District**”); and

Beacon Epperson Homeowners Association, Inc., a Florida not for profit corporation, whose mailing address is c/o American Realty Advisors, LLC 515 S. Flower Street, 49th Floor, Los Angeles, CA 90071 (the “**HOA**”).

WITNESSETH

WHEREAS, the District was established pursuant to the Uniform Community Development District Act of 1980, Chapter 190, *Florida Statutes*, as amended, by an ordinance of the Board of County Commissioners of Pasco County, Florida, and is validly existing under the Constitution and laws of the State of Florida; and

WHEREAS, HOA is the fee simple landowner of **Tract P1, Meadow Ridge Phase B, a subdivision according to the plat thereof recorded in Plat Book 85, Pages 142-153 in the Public Records of Pasco County, Florida**, marked as “P-1” on the attached **Exhibit A** (the “HOA’s Property”); and

WHEREAS, the District is the owner of right-of-way interests that surround **Tract P1, Meadow Ridge Phase B, a subdivision according to the plat thereof recorded in Plat Book 85, Pages 142-153 in the Public Records of Pasco County, Florida**, highlighted in Blue on the attached **Exhibit A** (the “District’s Property”); and

WHEREAS, HOA has requested that the District grant to them temporary access over the District’s Property for the purpose of placing a utility tie-in for the amenity center that will be constructed on the HOA’s Property. The District is agreeable to granting such an agreement on the terms and conditions set forth herein.

NOW, THEREFORE, in consideration of the sum of Ten and 00/100 Dollars (\$10.00) and other good and valuable consideration and the mutual covenants of the parties, the receipt and sufficiency of which are hereby acknowledged, the parties hereby agree as follows:

1. RECITALS. The foregoing recitals are true and correct and by this reference are incorporated as a material part of this Access Agreement.

2. GRANT OF ACCESS. The District hereby grants to HOA and its contractor temporary, non-exclusive access over, upon, under, through, and across the District’s Property for the purpose of HOA placing a utility tie-in for the construction of the HOA’s amenity center

(the "Access"). The location of the Access is highlighted in Yellow on the attached **Exhibit B**. The HOA shall only access and utilize the District's Property for purposes of placing the utility tie-in. All equipment, machinery, and materials are to be kept on the HOA's Property and are prohibited from being stored on the District's Property. HOA agrees and acknowledges that the District makes no representations or warranties that the District's Property is suitable for the HOA's needs. To the extent the District's Property is not suitable for the HOA's needs, the HOA assumes all risk and liability associated with any unauthorized use of the District's Property including damage to District's Property owned by third parties.

3. TERM. HOA and its contractor shall be permitted to use the Access until such time as construction of the pool is completed, at which time the Access shall terminate but not later than 90 days from the date of this Access Agreement.

4. RESTORATION. Prior to use of the District's Property, HOA shall submit photographs depicting the condition of the District's Property prior to HOA's use. On or prior to termination of this Access Agreement, HOA shall return the District's Property to the same condition prior to the construction. HOA shall use reasonable efforts to minimize disruption to the normal operation of any existing infrastructure of the District or any other owner and shall clean up after themselves or their contractors on a regular basis.

5. INDEMNIFICATION.

a. HOA agrees to indemnify and hold the District harmless from and against any and all damages, losses, or claims, including but not limited to legal fees and expenses, to the extent that such damages, losses, or claims are attributable to actions, omissions, or negligence in the use of the District's Property by HOA their agents, employees, or independent contractors.

b. HOA agrees that nothing contained in this Access Agreement shall constitute or be construed as a waiver of the District's limitations on liability set forth in Section 768.28, *Florida Statutes*, and other law.

6. DAMAGE. In the event there are damages to the District's Property or other property within the District's boundary resulting from the HOA or their respective employees, agents, assignees, or contractors (or their subcontractors, employees or materialmen) actions ("Damages"), HOA agrees to pursue the restoration of the District's Property and/or other property within the District's boundary and/or any of the improvements so damaged to the original condition and grade, including, without limitation, repair and replacement of any landscaping, hardscaping, plantings, ground cover, irrigation, roadways, driveways, sidewalks, parking areas, fences, walks, utility lines, stormwater facilities, pumping facilities, pumps and other structures, within thirty (30) days of the completion of the pool construction or termination of the term of this agreement whichever is first, and HOA shall allow no lien to attach to the District's Property or any improvements located on said property or other property within the District's property arising out of work performed by, for, or on behalf of HOA. HOA shall notify the District in writing that pool construction is complete within 5 business days of completion of pool construction. HOA restoration of Damages to the District's Property or improvements

located thereon shall be completed within thirty (30) days of the completion of the pool construction or termination of the term of this Access Agreement whichever is first. In the event such Damages are not restored to the sole satisfaction of the District, District may, in its sole discretion, undertake such repairs and remediations, and HOA shall pay to the District all such amounts within ten (10) days of receipt of such invoice.

8. DEFAULT. A default by either party under this Access Agreement shall entitle the other to all remedies available at law or in equity, which may include but not be limited to the right of actual damages, injunctive relief and/or specific performance.

9. ENFORCEMENT OF AGREEMENT. In the event that the District or HOA seeks to enforce this Access Agreement by court proceedings or otherwise, then the prevailing party shall be entitled to recover all fees and costs incurred, including reasonable attorneys' fees and costs for trial, alternative dispute resolution or appellate proceedings.

10. INSURANCE. HOA shall maintain or cause HOA's contractor(s) to maintain commercial liability insurance and casualty insurance in amounts not less than \$1,000,000.00. The foregoing insurance shall name the Epperson Ranch II Community Development District as additional insured for the pool construction job. HOA shall or cause HOA's contractors to provide a certificate of insurance evidencing the insurance coverage to the District Manager prior to commencing the construction work.

11. NOTICES. Whenever any party desires to give notice to the other party, it must be given by written notice, sent by email, certified United States mail with return receipt requested, or a nationally recognized express transportation company to the addresses below. In the event that any party undergoes a change in address or contact information, notification to the other party shall be made.

To HOA: Beacon Epperson HOAs Association, Inc.
c/o American Realty Advisors, LLC
515 S. Flower Street, 49th Floor
Los Angeles, CA 90071

To the District: Epperson Ranch II Community Development District
1540 International Parkway, Suite 2000
Lake Mary, Florida 32746
Attn: District Manager

12. THIRD PARTIES. This Access Agreement is solely for the benefit of the formal parties hereto, and no right or cause of action shall accrue upon or by reason, to or for the benefit of any third party not a formal party to this Access Agreement. Nothing in this Access Agreement expressed or implied is intended or shall be construed to confer upon any person or corporation other than the parties hereto any right, remedy, or claim under or by reason of this Access Agreement or any of the provisions or conditions hereof. The District shall be solely responsible for enforcing its rights under this Access Agreement against any interfering third

party. Nothing contained in this Access Agreement shall limit or impair the District's right to protect their rights from interference by a third party.

13. ASSIGNMENT. No party may assign, transfer or license all or any portion of its rights under this Access Agreement without the prior written consent of the other parties.

14. CONTROLLING LAW. This Access Agreement shall be construed, interpreted, and controlled according to the laws of the State of Florida with venue in the county the District is located.

15. PUBLIC RECORDS. As required under Section 119.0701, Florida Statutes, the HOA shall (a) keep and maintain public records that ordinarily and necessarily would be required by the District in order to perform the service, (b) provide the public with access to public records on the same terms and conditions that the District would provide the records and at a cost that does not exceed the cost provided by law, (c) ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law, (d) meet all requirements for retaining public records and transfer, at no cost, to the District all public records in possession of the HOA upon termination of this Agreement and destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. All records stored electronically must be provided to the District in a format that is compatible with the information technology systems of the District.

IF THE HOA HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE HOA'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS AGREEMENT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT 813.565.4663, BY EMAIL AT HELLO@BREEZEHOME.COM, OR BY REGULAR MAIL AT 1540 INTERNATIONAL PARKWAY, SUITE 2000, LAKE MARY, FL 32746.

16. SEVERABILITY. The invalidity or unenforceability of any one or more provisions of this Access Agreement shall not affect the validity or enforceability of the remaining portions of this Access Agreement, or any part of this Access Agreement not held to be invalid or unenforceable.

17. BINDING EFFECT. This Access Agreement and all of the provisions, representations, covenants, and conditions contained herein shall be binding upon and inure to the benefit of the parties hereto and their respective successors and permitted assigns.

18. AUTHORIZATION. By execution below, the undersigned represent that they have been duly authorized by the appropriate body or official of their respective entity to execute this Access Agreement, and that each party has complied with all the requirements of law and has full power and authority to comply with the terms and provisions of this instrument.

19. AMENDMENTS. Amendments to and waivers of the provisions contained in this Access Agreement may be made only by an instrument in writing which is executed by all parties hereto.

20. ENTIRE AGREEMENT. This instrument shall constitute the final and complete expression of the agreement between the parties relating to the subject matter of this Access Agreement.

(SIGNATURES APPEAR ON FOLLOWING PAGE)

IN WITNESS WHEREOF, the parties have caused this instrument to be executed by their duly authorized officers effective as of the day and year first above written.

ATTEST:

**EPPERSON RANCH II
COMMUNITY DEVELOPMENT DISTRICT**

Assistant Secretary

Joseph Murphy
Chair of the Board of Supervisors

ATTEST:

**BEACON EPPERSON
HOMEOWNERS ASSOCIATION, INC.**

Witness

By: _____
Name: _____
Title: _____

EXHIBIT A



Legend

Street (Labels)

Parcel (Lines)

Subdivision
(Boundaries and
Labels)

Parcels (Clickable Info)

Blocks (Boundaries and Labels)

Lot (Labels)

Lot (Lines)



Mike Wells
Property Appraiser
Proudly Serving Pasco County, Florida

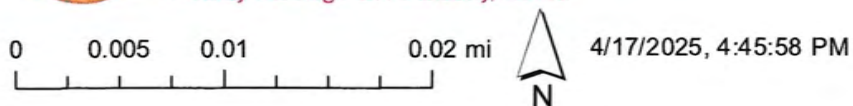
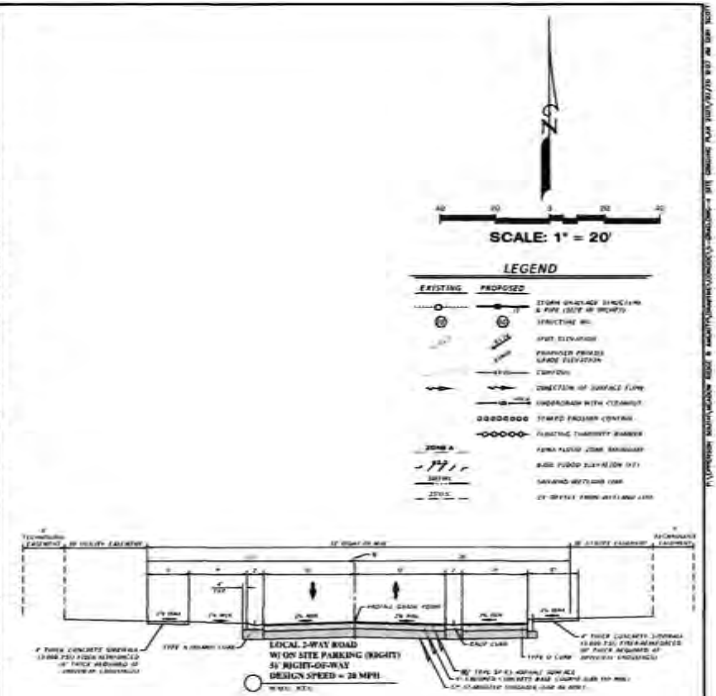
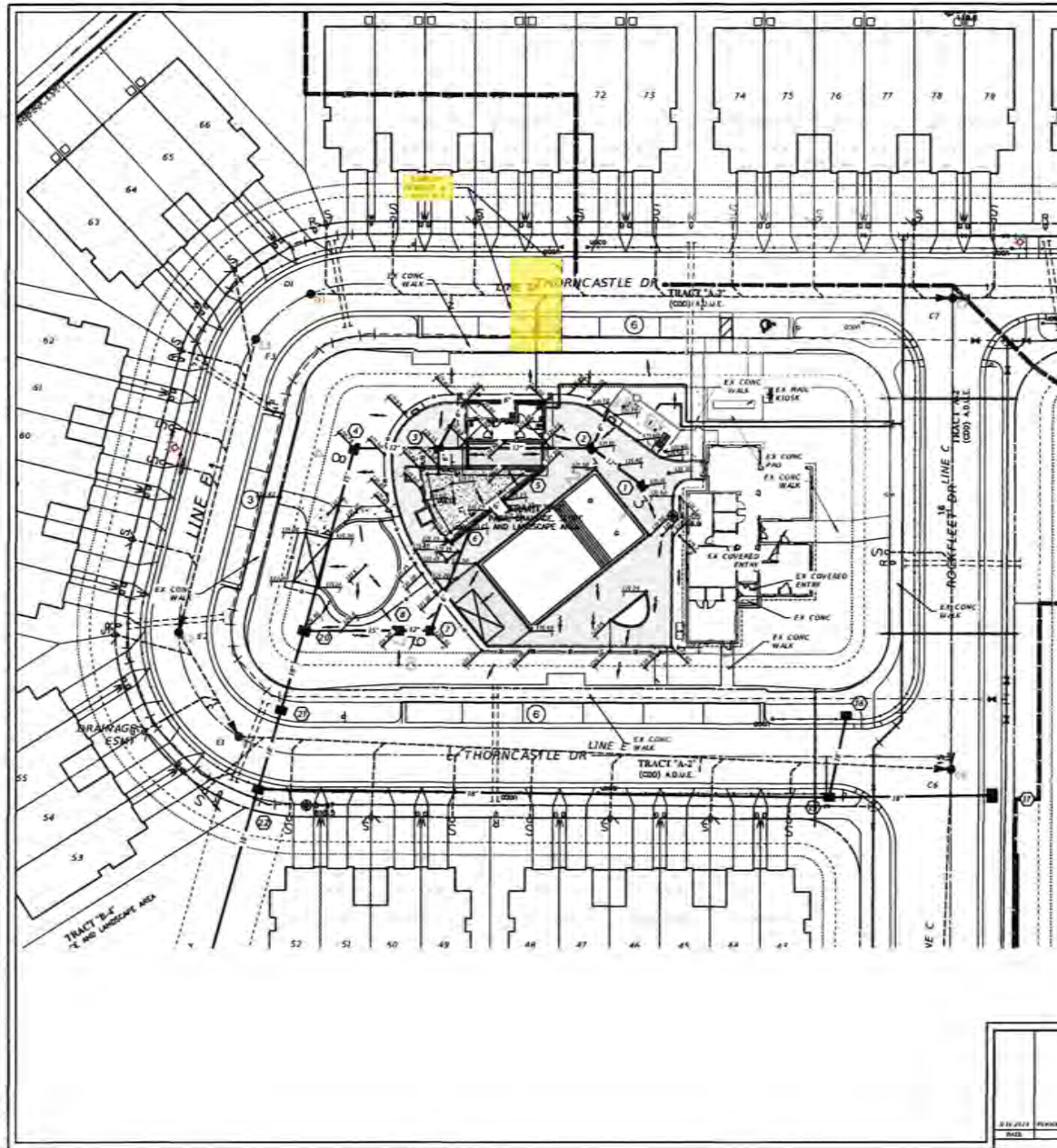
Pasco County Property Appraiser

EXHIBIT B



STORM STRUCTURE DATA									
NO.	TYPE & SIZE	TOP ELEV.	TYPE	DRAIN	SLOPE	LENGTH	SLOPE	ELEVATION	
								UPPER END	LOWER END
1	BOX DRAIN	107.12	MP	12	0.00	117.12	117.12	117.12	117.12
2	BOX DRAIN	107.12	MP	12	0.00	117.12	117.12	117.12	117.12
3	BOX DRAIN	107.12	MP	12	0.00	117.12	117.12	117.12	117.12
4	STI TYPE C	108.12	MP	12	0.00	117.12	117.12	117.12	117.12
5	BRICK DRAIN	107.12	MP	12	0.00	117.12	117.12	117.12	117.12
6	BRICK DRAIN	107.12	MP	12	0.00	117.12	117.12	117.12	117.12
7	ENLME DRAIN	107.12	MP	12	0.00	117.12	117.12	117.12	117.12
8	STI TYPE C	108.12	MP	12	0.00	117.12	117.12	117.12	117.12

Clearview
LAND DESIGN, P.L.
A General Practice of Professional Engineering
and Surveying
1000 N. W. 10th Ave., Suite 100
Fort Lauderdale, FL 33304

SITE GRADING PLAN

EPPELSON SOUTH
PARCEL B POOL

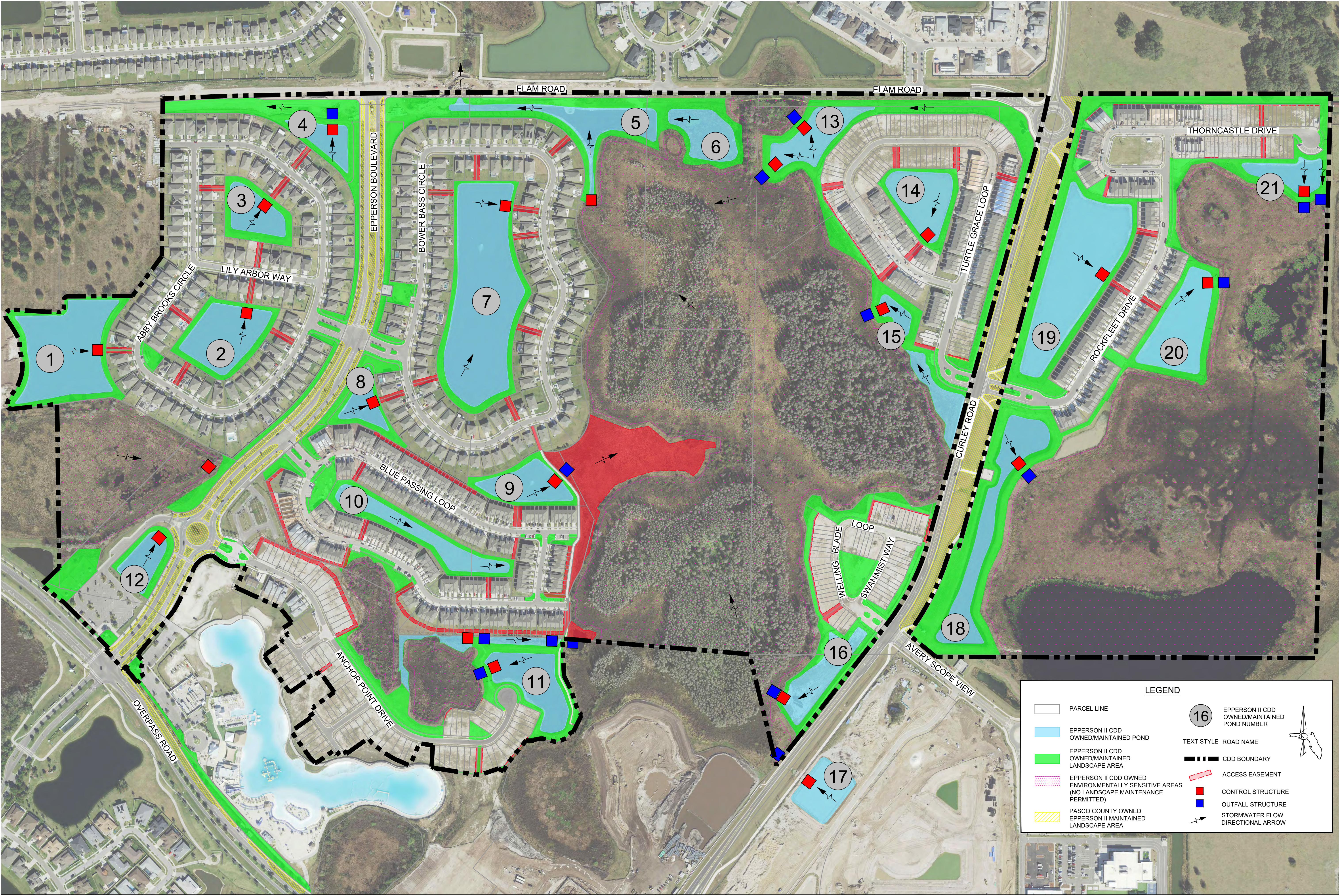
DATE: 02-26-2025

BY: JEFFERSON WILSON, P.E.

Checkered based on Florida Department of Transportation (FDOT) 11-2015

Continued from SHEET 3 of 12 SHEETS

SHEET 4 OF 12 SHEETS



RESOLUTION 2025-08
[FY 2026 APPROPRIATION RESOLUTION]

THE ANNUAL APPROPRIATION RESOLUTION OF THE EPPERSON RANCH II COMMUNITY DEVELOPMENT DISTRICT ("DISTRICT") RELATING TO THE ANNUAL APPROPRIATIONS AND ADOPTING THE BUDGET(S) FOR THE FISCAL YEAR BEGINNING OCTOBER 1, 2025, AND ENDING SEPTEMBER 30, 2026; AUTHORIZING BUDGET AMENDMENTS; AND PROVIDING AN EFFECTIVE DATE.

WHEREAS, for the fiscal year beginning October 1, 2025, and ending September 30, 2026 ("**FY 2026**"), the District Manager prepared and submitted to the Board of Supervisors ("**Board**") of the Epperson Ranch II Community Development District ("**District**") prior to June 15, 2025, proposed budget(s) ("**Proposed Budget**") along with an explanatory and complete financial plan for each fund of the District, pursuant to the provisions of Section 190.008(2)(a), *Florida Statutes*; and

WHEREAS, at least sixty (60) days prior to the adoption of the Proposed Budget, the District filed a copy of the Proposed Budget with the local general-purpose government(s) having jurisdiction over the area included in the District pursuant to the provisions of Section 190.008(2)(b), *Florida Statutes*; and

WHEREAS, the Board set a public hearing on the Proposed Budget and caused notice of such public hearing to be given by publication pursuant to Section 190.008(2)(a), *Florida Statutes*; and

WHEREAS, the District Manager posted the Proposed Budget on the District's website in accordance with Section 189.016, *Florida Statutes*; and

WHEREAS, Section 190.008(2)(a), *Florida Statutes*, requires that, prior to October 1st of each year, the Board, by passage of the Annual Appropriation Resolution, shall adopt a budget for the ensuing fiscal year and appropriate such sums of money as the Board deems necessary to defray all expenditures of the District during the ensuing fiscal year.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE EPPERSON RANCH II COMMUNITY DEVELOPMENT DISTRICT:

SECTION 1. BUDGET

- a. The Proposed Budget, attached hereto as **Exhibit A**, as amended by the Board, is hereby adopted in accordance with the provisions of Section 190.008(2)(a), *Florida Statutes* ("**Adopted Budget**"), and incorporated herein by reference; provided, however, that the comparative figures contained in the Adopted Budget may be subsequently revised as deemed necessary by the District Manager to reflect actual revenues and expenditures.
- b. The Adopted Budget, as amended, shall be maintained in the office of the District Manager and at the District's Local Records Office and identified as "The Budget for the Epperson Ranch II Community Development District for the Fiscal Year Ending September 30, 2026."

- c. The Adopted Budget shall be posted by the District Manager on the District's official website in accordance with Chapter 189, *Florida Statutes*, and shall remain on the website for at least two (2) years.

SECTION 2. APPROPRIATIONS

There is hereby appropriated out of the revenues of the District, for FY 2026, the sum(s) set forth in **Exhibit A** to be raised by the levy of assessments and/or otherwise, which sum is deemed by the Board to be necessary to defray all expenditures of the District during said budget year, to be divided and appropriated as set forth in **Exhibit A**.

SECTION 3. BUDGET AMENDMENTS

Pursuant to Section 189.016, *Florida Statutes*, the District at any time within FY 2026 or within 60 days following the end of the FY 2026 may amend its Adopted Budget for that fiscal year as follows:

- a. A line-item appropriation for expenditures within a fund may be decreased or increased by motion of the Board recorded in the minutes, and approving the expenditure, if the total appropriations of the fund do not increase.
- b. The District Manager or Treasurer may approve an expenditure that would increase or decrease a line-item appropriation for expenditures within a fund if the total appropriations of the fund do not increase and if either (i) the aggregate change in the original appropriation item does not exceed the greater of \$15,000 or 15% of the original appropriation, or (ii) such expenditure is authorized by separate disbursement or spending resolution.
- c. Any other budget amendments shall be adopted by resolution and consistent with Florida law. The District Manager or Treasurer must ensure that any amendments to the budget under this paragraph c. are posted on the District's website in accordance with Chapter 189, *Florida Statutes*, and remain on the website for at least two (2) years.

SECTION 4. EFFECTIVE DATE. This Resolution shall take effect immediately upon adoption.

PASSED AND ADOPTED THIS 7TH DAY OF AUGUST 2025.

ATTEST:

**EPPERSON RANCH II COMMUNITY
DEVELOPMENT DISTRICT**

Secretary / Assistant Secretary

Chair/Vice Chair, Board of Supervisors

Exhibit A: FY 2026 Budget

Epperson Ranch II

Community Development District

Annual Operating and Debt Service Budget

Fiscal Year 2026
Final Budget

Prepared by:



EPPERSON RANCH II
Community Development District

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Summary of Revenues, Expenditures and Changes in Fund Balances
Fiscal Year 2026 Budget

ACCOUNT DESCRIPTION	ADOPTED	ACTUAL	PROJECTED	TOTAL		ANNUAL
	BUDGET	THRU	July-	PROJECTED	% +/-	BUDGET
	FY 2025	6/30/25	10/1/2025	FY 2025	Budget	FY 2026
REVENUES						
General Fund Revenues - Projected on Roll	738,662	726,514	12,148	738,662	0%	951,767
General Fund Revenues - Projected off Roll & Lot Closing	65,520	104,599	-	104,599	60%	-
Interest Income	-	340	-	340	0%	-
Developer Funding - Interim Operation	100,000	100,000	-	100,000	0%	-
Miscellaneous Revenue	-	19	-	19	0%	-
TOTAL REVENUES	\$ 904,182	\$ 931,472	\$ 12,148	\$ 943,620		\$ 951,767
EXPENDITURES						
Financial & Administrative						
Supervisors Compensation	12,000	5,600	6,400	12,000	0%	12,000
Payroll Taxes	918	428	490	918	0%	918
Payroll Service fees	715	550	165	715	0%	715
Management Consulting Fees	25,000	19,833	5,167	25,000	0%	68,000
Planning & Coordinating Services	34,000	17,000	17,000	34,000	0%	-
Travel Per Diem	500	225	275	500	0%	-
Administrative Services	6,000	3,000	3,000	6,000	0%	-
Meeting Room Rental	1,000	2,205	-	2,205	121%	1,500
Bank Fees	175	-	175	175	0%	175
Auditing Services	4,400	-	4,400	4,400	0%	4,400
Regulatory and Permit Fees	175	175	-	175	0%	175
Legal Advertisements	1,500	849	651	1,500	0%	1,500
Engineering Services	8,000	4,545	3,455	8,000	0%	8,000
Legal Services	12,000	23,157	-	23,157	93%	15,000
Assesment Collection Fee	150	567	-	567	278%	5,000
Website Development & Hosting	2,015	1,723	292	2,015	0%	1,515
Miscellaneous	100	13	87	100	0%	100
Insurance (Public Officials, General Liability, Property, Casualty & Crime)	41,540	40,499	1,041	41,540	0%	41,508
Total Financial & Administrative	\$ 150,188	\$ 120,369	\$ 42,598	\$ 162,967		\$ 160,506
Debt administration						
Dissemination Agent	8,000	9,167	\$ -	\$ 9,167	15%	8,000
Trustee Fees	8,082	7,408	674	8,082	0%	8,082
Developer Funding - Interim Operating	100,000	-	100,000	100,000	0%	-
Arbitrage	950	475	475	950	0%	950
Total Debt administration	\$ 117,032	\$ 17,050	\$ 101,149	\$ 118,199		\$ 17,032
Physical Environment Expenditures						
Comprehensive Field Tech Services	15,000	10,000	\$ 5,000	\$ 15,000	0%	15,000
Amenity Manager	5,000	2,917	2,083	5,000	0%	-
Utility - Electricity	8,024	7,677	347	8,024	0%	8,024
Utility - Streetlight	93,600	82,383	11,217	93,600	0%	93,600
Utility - Water	22,800	4,838	17,962	22,800	0%	22,800
Pet Waste Removal	7,000	-	7,000	7,000	0%	7,000
Lake/pond Maintenance & Inspection	14,940	16,830	-	16,830	13%	15,388
Landscape Maintenance	282,248	220,253	61,995	282,248	0%	252,515
Landscape Replacement	15,000	4,041	10,959	15,000	0%	15,000
Irrigation Repairs	18,000	29,957	-	29,957	66%	50,000
Pond Fountain Maintenance	5,000	4,050	950	5,000	0%	5,000
Key Fobs/Transmitters	1,000	-	1,000	1,000	0%	-
Biscayne Fountain Maintenance	5,400	2,250	3,150	5,400	0%	5,400
Maintenance Services	12,000	6,000	6,000	12,000	0%	-
Holiday Decorations	8,000	7,200	800	8,000	0%	8,000
Pressure Washing	9,225	-	9,225	9,225	0%	9,225
Midge Fly Treatments	7,565	7,565	-	7,565	0%	7,565
Contingency	107,160	34,044	73,116	107,160	0%	212,127
Total Physical Environment Expenditures	\$ 636,962	\$ 440,005	\$ 210,804	\$ 650,809		\$ 726,644
TOTAL EXPENDITURES	\$ 904,182	\$ 577,424	\$ 354,551	\$ 931,975	\$ -	\$ 904,182
Net change in fund balance	\$ -	\$ 354,048	\$ (342,403)	\$ 11,645		\$ 47,585
FUND BALANCE, BEGINNING	\$ 112,426	\$ 112,426	\$ -	\$ 112,426		\$ 124,071
FUND BALANCE, ENDING	\$ 112,426	\$ 466,474	\$ (342,403)	\$ 124,071		\$ 171,656

Summary of Revenues, Expenditures and Changes in Fund Balances
Series 2018 Bonds
Fiscal Year 2026

ACCOUNT DESCRIPTION	ADOPTED BUDGET FY 2025	ACTUAL THRU 6/30/2025	PROJECTED July- 9/30/2025	TOTAL PROJECTED FY 2025	ANNUAL BUDGET FY 2026
REVENUES					
Special Assmnts- Tax Collector	445,800	-	445,800	445,800	445,800
TOTAL REVENUES	\$ 445,800	\$ -	\$ 445,800	\$ 445,800	\$ 445,800
EXPENDITURES					
<i>Debt Service</i>					
Miscellaneous Collection Costs	\$ 9,288	\$ -	9,288	9,288	\$ 9,288
Principal Debt Retirement	115,000	-	115,000	115,000	120,000
Interest Expense	319,951	-	319,951	319,951	314,125
TOTAL EXPENDITURES	\$ 444,239	\$ -	\$ 444,239	\$ 444,239	\$ 443,413
Excess (deficiency) of revenues Over (under) expenditures	\$ 1,561	\$ -	\$ 1,561	\$ 1,561	\$ 2,387
Net change in fund balance	\$ 1,561	\$ -	\$ 1,561	\$ 1,561	\$ 4,774
FUND BALANCE, BEGINNING	\$ 445,756	\$ 447,317	\$ 447,317	\$ 445,756	\$ 447,317
FUND BALANCE, ENDING	\$ 447,317	\$ 447,317	\$ 448,878	\$ 447,317	\$ 452,091

Summary of Revenues, Expenditures and Changes in Fund Balances
Series 2020 Bonds
Fiscal Year 2026

ACCOUNT DESCRIPTION	ADOPTED BUDGET FY 2025	ACTUAL THRU 6/30/2025	PROJECTED July- 9/30/2025	TOTAL PROJECTED FY 2025	ANNUAL BUDGET FY 2026
REVENUES					
Interest - Investments	\$ -	\$ -	-	\$ -	\$ -
Special Assmnts- Tax Collector	281,835	-	281,835	281,835	281,835
TOTAL REVENUES	\$ 281,835	\$ -	\$ 281,835	\$ 281,835	\$ 281,835
EXPENDITURES					
<i>Debt Service</i>					
Miscellaneous Collection Costs	\$ 5,872	\$ -	5,872	5,872	\$ 5,872
Principal Debt Retirement	90,000	-	90,000	90,000	85,000
Interest Expense	182,683	-	182,683	182,683	162,353
TOTAL EXPENDITURES	\$ 278,555	\$ -	\$ 278,555	\$ 278,555	\$ 253,225
Excess (deficiency) of revenues Over (under) expenditures	\$ 3,280	\$ -	\$ 3,280	\$ 3,280	\$ 28,610
Net change in fund balance	\$ 3,280	\$ -	\$ 3,280	\$ 3,280	\$ 57,220
FUND BALANCE, BEGINNING	\$ 333,514	\$ 336,794	\$ 336,794	\$ 333,514	\$ 336,794
FUND BALANCE, ENDING	\$ 336,794	\$ 336,794	\$ 340,074	\$ 336,794	\$ 394,014

Assessment Summary
Fiscal Year 2026 vs. Fiscal Year 2025

ASSESSMENT ALLOCATION											
Series 2018 Bonds											
Product	Units	O&M Assessment				Debt Service		Total Assessments per Unit			
		FY 2026	FY 2025	Dollar Change	Percent Change	FY 2026	FY 2025	FY 2026	FY 2025	Dollar Change	
22' (townhome) (a) 50'	214	\$ 757.24	\$ 673.49	\$ 83.75	12%	\$ 581.68	\$ 581.68	\$ 1,338.92	\$ 1,255.17	\$ 83.75	
	257	\$ 1,682.76	\$ 1,496.65	\$ 186.11	12%	\$ 1,322.55	\$ 1,322.55	\$ 3,005.31	\$ 2,819.20	\$ 186.11	
	471										
Series 2020 Bonds											
Product	Units	O&M Assessment				Debt Service		Total Assessments per Unit			
		FY 2026	FY 2025	Dollar Change	Percent Change	FY 2026	FY 2025	FY 2026	FY 2025	Dollar Change	
22' (townhome) (a)	242	\$ 757.24	\$ 673.49	\$ 83.75	12%	\$ 638.30	\$ 638.30	\$ 1,395.54	\$ 1,311.79	\$ 83.75	
27' (phase 7)	102	\$ 1,009.66	\$ 897.99	\$ 111.67	12%	\$ 1,063.83	\$ 1,063.83	\$ 2,073.49	\$ 1,961.82	\$ 111.67	
22' TH Parcel b1	174	\$ 757.24	\$ 119.73	\$ 637.51	532%	\$ 702.13	\$ 702.13	\$ 1,459.37	\$ 821.86	\$ 637.51	
	518										

Notations:

(1) Contains 6% assessment gross up contemplating fees to the property appraiser and tax collector as well as a 4% early prepayment discount

RESOLUTION 2025-09
[FY 2026 ASSESSMENT RESOLUTION]

A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE EPPERSON RANCH II COMMUNITY DEVELOPMENT DISTRICT PROVIDING FOR FUNDING FOR THE FY 2026 ADOPTED BUDGET(S); PROVIDING FOR THE COLLECTION AND ENFORCEMENT OF SPECIAL ASSESSMENTS, INCLUDING BUT NOT LIMITED TO PENALTIES AND INTEREST THEREON; CERTIFYING AN ASSESSMENT ROLL; PROVIDING FOR AMENDMENTS TO THE ASSESSMENT ROLL; PROVIDING A SEVERABILITY CLAUSE; AND PROVIDING AN EFFECTIVE DATE.

WHEREAS, the Epperson Ranch II Community Development District ("**District**") is a local unit of special-purpose government established pursuant to Chapter 190, *Florida Statutes*, for the purpose of providing, operating and maintaining infrastructure improvements, facilities and services to the lands within the District, located in Pasco County, Florida ("**County**"); and

WHEREAS, the District has constructed or acquired various infrastructure improvements and provides certain services in accordance with the District's adopted capital improvement plan and Chapter 190, *Florida Statutes*; and

WHEREAS, for the fiscal year beginning October 1, 2025, and ending September 30, 2026 ("**FY 2026**"), the Board of Supervisors ("**Board**") of the District has determined to undertake various operations and maintenance and other activities described in the District's budget ("**Adopted Budget**"), attached hereto as **Exhibit A**; and

WHEREAS, pursuant to Chapter 190, *Florida Statutes*, the District may fund the Adopted Budget through the levy and imposition of special assessments on benefitted lands within the District and, regardless of the imposition method utilized by the District, under Florida law the District may collect such assessments by direct bill, tax roll, or in accordance with other collection measures provided by law; and

WHEREAS, in order to fund the District's Adopted Budget, the District's Board now desires to adopt this Resolution setting forth the means by which the District intends to fund its Adopted Budget.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE EPPERSON RANCH II COMMUNITY DEVELOPMENT DISTRICT:

1. **FUNDING.** The District's Board hereby authorizes the funding mechanisms for the Adopted Budget as provided further herein and as indicated in the Adopted Budget attached hereto as **Exhibit A** and the assessment roll attached hereto as **Exhibit B** ("**Assessment Roll**").
2. **OPERATIONS AND MAINTENANCE ASSESSMENTS.**
 - a. **Benefit Findings.** The provision of the services, facilities, and operations as described in **Exhibit A** confers a special and peculiar benefit to the lands within the District, which benefit exceeds or equals the cost of the assessments. The allocation of the assessments to the specially benefitted lands is shown in **Exhibit A** and **Exhibit B** and is hereby found to be fair and reasonable.

- b. **O&M Assessment Imposition.** Pursuant to Chapter 190, *Florida Statutes*, a special assessment for operations and maintenance (“**O&M Assessment(s)**”) is hereby levied and imposed on benefitted lands within the District and in accordance with **Exhibit A** and **Exhibit B**. The lien of the O&M Assessments imposed and levied by this Resolution shall be effective upon passage of this Resolution.
 - c. **Maximum Rate.** Pursuant to Section 197.3632(4), *Florida Statutes*, the lien amount shall serve as the “maximum rate” authorized by law for operation and maintenance assessments.
- 3. **DEBT SERVICE SPECIAL ASSESSMENTS.** The District’s Board hereby certifies for collection the FY 2026 installment of the District’s previously levied debt service special assessments (“**Debt Assessments**,” and together with the O&M Assessments, the “**Assessments**”) in accordance with this Resolution and as further set forth in **Exhibit A** and **Exhibit B**, and hereby directs District staff to affect the collection of the same.
- 4. **COLLECTION AND ENFORCEMENT; PENALTIES; INTEREST.** Pursuant to Chapter 190, *Florida Statutes*, the District is authorized to collect and enforce the Assessments as set forth below.

 - a. **Tax Roll Assessments.** To the extent indicated in **Exhibit A** and **Exhibit B**, those certain O&M Assessments (if any) and/or Debt Assessments (if any) imposed on the “**Tax Roll Property**” identified in **Exhibit B** shall be collected by the County Tax Collector at the same time and in the same manner as County property taxes in accordance with Chapter 197, *Florida Statutes* (“**Uniform Method**”). That portion of the Assessment Roll which includes the Tax Roll Property is hereby certified to the County Tax Collector and shall be collected by the County Tax Collector in the same manner and time as County property taxes. The District’s Board finds and determines that such collection method is an efficient method of collection for the Tax Roll Property.
 - b. **Future Collection Methods.** The District’s decision to collect Assessments by any particular method – e.g., on the tax roll or by direct bill – does not mean that such method will be used to collect special assessments in future years, and the District reserves the right in its sole discretion to select collection methods in any given year, regardless of past practices.
- 5. **ASSESSMENT ROLL; AMENDMENTS.** The Assessment Roll, attached hereto as **Exhibit B**, is hereby certified for collection. The Assessment Roll shall be collected pursuant to the collection methods provided above. The proceeds therefrom shall be paid to the District. The District Manager shall keep apprised of all updates made to the County property roll by the Property Appraiser after the date of this Resolution and shall amend the Assessment Roll in accordance with any such updates, for such time as authorized by Florida law, to the County property roll.

6. **SEVERABILITY.** The invalidity or unenforceability of any one or more provisions of this Resolution shall not affect the validity or enforceability of the remaining portions of this Resolution, or any part thereof.

7. **EFFECTIVE DATE.** This Resolution shall take effect upon the passage and adoption of this Resolution by the Board.

[CONTINUED ON NEXT PAGE]

PASSED AND ADOPTED THIS 7TH DAY OF AUGUST 2025.

ATTEST:

**EPPERSON RANCH II COMMUNITY
DEVELOPMENT DISTRICT**

Secretary / Assistant Secretary

By: _____

Its: _____

Exhibit A: Adopted Budget

Exhibit B: Assessment Roll

RESOLUTION 2025-10

A RESOLUTION OF THE EPPERSON RANCH II COMMUNITY DEVELOPMENT DISTRICT ADOPTING THE ANNUAL MEETING SCHEDULE FOR FISCAL YEAR 2025/2026

WHEREAS, the Epperson Ranch II Community Development District (the "District") is a local unit of special-purpose government organized and existing in accordance with Chapter 190, Florida Statutes, and situated entirely within Pasco County, Florida; and

WHEREAS, the District is required by Florida law to prepare an annual schedule of its regular public meetings, which designates the date, time, and location of the District's meetings; and

WHEREAS, the Board has proposed the Fiscal Year 2025/2026 annual meeting schedule as attached in **Exhibit A**;

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE EPPERSON RANCH II COMMUNITY DEVELOPMENT DISTRICT

1. The Fiscal Year 2025/2026 annual public meeting schedule attached hereto and incorporated by reference herein as Exhibit A is hereby approved and will be published and filed in accordance with the requirements of Florida law.

This Resolution shall become effective immediately upon its adoption.

PASSED AND ADOPTED THIS 7th DAY OF AUGUST 2025.

ATTEST:

**EPPERSON RANCH II
DEVELOPMENT DISTRICT**

Asst. Secretary

Chair / Vice Chair

EXHIBIT “A”

**BOARD OF SUPERVISORS MEETING DATES
EPPERSON RANCH II COMMUNITY DEVELOPMENT
DISTRICT FISCAL YEAR 2025/2026**

October 9, 2025
November 6, 2025
December 4, 2025
January 8, 2026
February 5, 2026
March 5, 2026
April 2, 2026
May 7, 2026
June 4, 2026
July 2, 2026
August 6, 2026
September 3, 2026

All meetings will be held at 6:00 p.m. at the WaterGrass Club, 32711 Windelstraw Drive, Wesley Chapel, Florida 33545

RESOLUTION 2025-11

A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE EPPERSON RANCH II COMMUNITY DEVELOPMENT DISTRICT ADOPTING GOALS, OBJECTIVES, AND PERFORMANCE MEASURES AND STANDARDS; PROVIDING A SEVERABILITY CLAUSE; AND PROVIDING AN EFFECTIVE DATE.

WHEREAS, the Epperson Ranch II Community Development District (the “District”) is a local unit of special-purpose government created and existing pursuant to Chapter 190, *Florida Statutes*; and

WHEREAS, effective July 1, 2024, the Florida Legislature adopted House Bill 7013, codified as Chapter 2024-136, Laws of Florida (“HB 7013”) and creating Section 189.0694, Florida Statutes; and

WHEREAS, pursuant to HB 7013 and Section 189.0694, Florida Statutes, beginning October 1, 2024, the District shall establish goals and objectives for the District and create performance measures and standards to evaluate the District’s achievement of those goals and objectives; and

WHEREAS, the District Manager has prepared the attached goals, objectives, and performance measures and standards and presented them to the Board of the District; and

WHEREAS, the District’s Board of Supervisors (“Board”) finds that it is in the best interests of the District to adopt by resolution the attached goals, objectives and performance measures and standards.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE EPPERSON RANCH II COMMUNITY DEVELOPMENT DISTRICT:

SECTION 1. The recitals so stated are true and correct and by this reference are incorporated into and form a material part of this Resolution.

SECTION 2. The District Board of Supervisors hereby adopts the goals, objectives and performance measures and standards as provided in **Exhibit A**. The District Manager shall take all actions to comply with Section 189.0694, Florida Statutes, and shall prepare an annual report regarding the District’s success or failure in achieving the adopted goals and objectives for consideration by the Board of the District.

SECTION 3. If any provision of this resolution is held to be illegal or invalid, the other provisions shall remain in full force and effect.

SECTION 4. This resolution shall become effective upon its passage and shall remain in effect unless rescinded or repealed.

PASSED AND ADOPTED this 7th day of August 2025.

ATTEST:

**EPPERSON RANCH II
COMMUNITY DEVELOPMENT DISTRICT**

Secretary/Assistant Secretary

Chair, Board of Supervisors

Exhibit A: Performance Measures/Standards and Annual Reporting

Exhibit A



**Epperson Ranch II Community Development District (“District”)
Performance Measures/Standards & Annual Reporting Form**

October 1, 2025 – September 30, 2026

1. Community Communication and Engagement

Goal 1.1: Public Meetings Compliance

Objective: Hold at least ten regular Board of Supervisors (“Board”) meetings per year to conduct District-related business and discuss community needs.

Measurement: Number of public Board meetings held annually as evidenced by meeting minutes and legal advertisements.

Standard: A minimum of ten Board meetings were held during the fiscal year.

Achieved: Yes ☐ No ☐

Goal 1.2: Notice of Meetings Compliance

Objective: Provide public notice of each meeting in accordance with Florida Statutes, using at least two communication methods.

Measurement: Timeliness and method of meeting notices as evidenced by posting to the District’s website, publishing in local newspaper of general circulation, and or via electronic communication.

Standard: 100% of meetings were advertised in accordance with Florida Statutes on at least two mediums (e.g., newspaper, District website, electronic communications).

Achieved: Yes ☐ No ☐

Goal 1.3: Access to Records Compliance

Objective: Ensure that meeting minutes and other public records are readily available and easily accessible to the public by completing monthly District website checks.

Measurement: Monthly website reviews will be completed to ensure meeting minutes and other public records are up to date as evidenced by District Management’s records.

Standard: 100% of monthly website checks were completed by District Management or third party vendor.

Achieved: Yes ☐ No ☐

2. Infrastructure and Facilities Maintenance

Goal 2.1: District Infrastructure and Facilities Inspections

Objective: District Engineer will conduct an annual inspection of the District’s infrastructure and related systems.

Measurement: A minimum of one inspection completed per year as evidenced by district engineer’s report related to District’s infrastructure and related systems.

Standard: Minimum of one inspection was completed in the fiscal year by the District’s engineer.

Achieved: Yes ☐ No ☐

3. Financial Transparency and Accountability

Goal 3.1: Annual Budget Preparation

Objective: Prepare and approve the annual proposed budget by June 15 and final budget was adopted by September 30 each year.

Measurement: Proposed budget was approved by the Board before June 15 and final budget was adopted by September 30 as evidenced by meeting minutes and budget documents listed on the District's website and/or within District records.

Standard: 100% of budget approval & adoption were completed by the statutory deadlines and posted to the District's website.

Achieved: Yes ☐ No ☐

Goal 3.2: Financial Reports

Objective: Publish to the District's website the most recent versions of the following documents: Florida Auditor General link (<https://flauditor.gov/>) to obtain current and past Annual audit, current fiscal year budget with any amendments, and most recent financials within the latest agenda package.

Measurement: Florida Auditor General link (<https://flauditor.gov/>) to the Annual audit, previous years' budgets, and financials are accessible to the public as evidenced by corresponding documents on the District's website.

Standard: District's website contains 100% of the following information: Department of Financial Services link to obtain Annual audit, most recent adopted/amended fiscal year budget, and most recent agenda package with updated financials.

Achieved: Yes ☐ No ☐

Goal 3.3: Annual Financial Audit

Objective: Conduct an annual independent financial audit per statutory requirements and publish the Florida Auditor General link (<https://flauditor.gov/>) to the results to the District's website for public inspection, and transmit to the State of Florida.

Measurement: Timeliness of audit completion and publication as evidenced by meeting minutes showing Board approval and annual audit is available on the District's website and transmitted to the State of Florida.

Standard: Audit was completed by an independent auditing firm per statutory requirements and results were posted to the District's website and transmitted to the State of Florida.

Achieved: Yes ☐ No ☐

SIGNATURES:

Chair/Vice Chair: _____

Date: _____

Printed Name: _____

Epperson Ranch II Community Development District

District Manager: _____

Date: _____

Printed Name: _____

Epperson Ranch II Community Development District



12407 N. Florida Avenue
Tampa, FL 33612
Phone: 813.932.1588
Fax: 813.388.4189
www.reservestudyfl.com

July 29, 2025

Epperson Ranch II CDD
c/o Inframark Community Management
313 Campus Street
Celebration, FL 34747

RE: Full Service Reserve Study with Site Inspection
Epperson Ranch II CDD
Epperson Blvd
Wesley Chapel, FL 33545

Dear Board of Supervisors:

We are providing this engagement letter to recognize your request for us to perform a full service reserve study with site inspection and recommendations for the property identified above. The reserve study will project costs and funding for a 30 year time frame for walls, stormwater drainage, ponds, fountains, CDD-owned sidewalks and any other items specified by you. The financial analysis portion of the study will include allowances for your interest income and projected changes in building costs. The pooled method and component method (if applicable) will be used and presented to derive the funding schedules.

Our fee for the assignment is \$4,000.00. We will provide you with electronic copies of the reserve study. Payment will be due at the time of reserve study completion and delivery of the reports. The reserve study will be completed within ten weeks of our firm receiving this engagement letter signed and faxed or emailed to our office.

Please call if you have any questions.

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:

Scope of Service

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

- Site inspection of common areas and improvements from a CAI-designated Reserve Specialist.
- 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 first 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 and site aerials.

Qualifications

Paul Gallizzi and Steven Swartz are professionals in the business of preparing reserve studies and insurance appraisals for community associations. We 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

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, reclaimed 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.

PREPARED FOR:

**Epperson Ranch II 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



Epperson Ranch II Community Development District Reserve Study Proposal

Alize Aninipot

Assistant District Manager

Epperson Ranch II Community Development District
Reference #1531

Epperson Blvd
Wesley Chapel, FL

30+
YEARS OF
EXPERIENCE

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.

Epperson Ranch II Community Development District Reserve Study Proposal

Benefits of a Custom Reserves Report

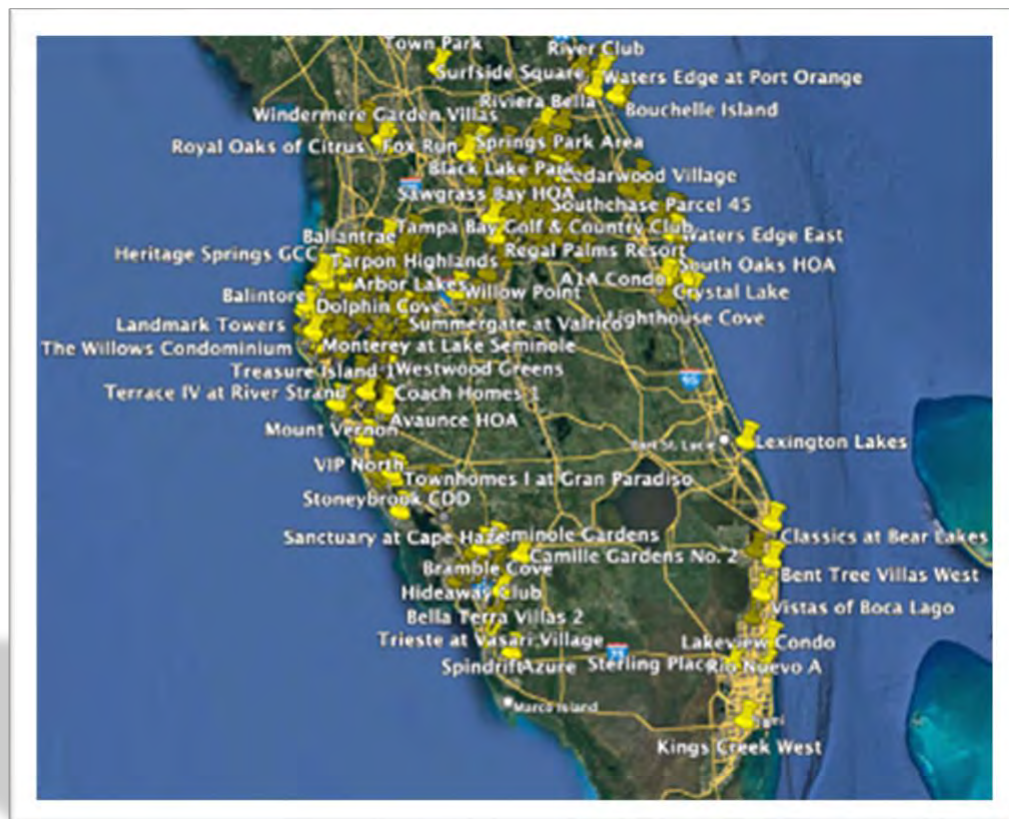
- **Proper and accurate** reserve planning for the future
- **Increased awareness** of upcoming major property repairs and replacements
- **Maximized** property and re-sale values when adequately funded
- **Increased** likelihood of loans being granted by lenders when adequately funded
- **Decreased**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

Click Here

For More Information



Florida Clients Served



Epperson Ranch II 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		COMMON COMPONENTS (X)			REMAINING COMPONENTS (O)	
COMPONENT		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				
Clubhouse, Windows and Doors		X				
Driveways at Cluster Homes					O	
Streets and Common Flatwork, Partial Replacement		X				
Light Fixtures, Serving Cluster Homes					O	
Walkways, Serving Cluster Homes					O	
Less Than \$7,000			X			
...						O
...				X		
and Associated Components						O
Downspouts, Serving Cluster Homes					O	
System Air Conditioners, Serving Cluster Homes					O	
Irrigation 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**

Epperson Ranch II 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.



Epperson Ranch II Community Development District

Reserve Study Proposal

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 losses, 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.

Epperson Ranch II Community Development District Reserve Study Proposal

[Click Here](#)
For Sample Report



Components Anticipated to be Included in Your Custom Reserve Study

Component Category	Component Name
Property Site	Asphalt Pavement Concrete Flatwork Fences Irrigation System Lighting Perimeter Walls Ponds Storm Water System Signage

Epperson Ranch II Community Development District Reserve Study Proposal

REF #: 1531

Confirmation of Services

Fee estimates are based on the components summarized in the previous table. The fee for this Full Reserve Study is ----- **\$3,400.**

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 District 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

Epperson Ranch II Community Development District Reserve Study Proposal

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:

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.

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.

The Groves Golf and Country Club Master Association is a planned unit development established in 2000 and located in Land O Lakes, FL. The Groves is responsible for the paint and roofs shared by 285 Club Homes, 273 Courtyard Homes and 123 Patio 1 Homes.

Suncoast Meadows Master Association is a planned unit development located in Land O' Lakes, FL and is responsible for the common elements shared by 487 property owners. Suncoast Meadows was established in 2007. The development contains 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.



Capital Reserve Advisors

14502 N Dale Mabry Hwy. Suite 200. Tampa, FL 33618
pierre@capitalreserveadvisors.com
www.capitalreserveadvisors.com
(813)444-8022

July 29, 2025

Alize Aninipot
Epperson Ranch II CDD
C/O Inframark
Wesley Chapel, FL 33545

Proposal for Reserve Study with On-Site Analysis

As you requested, we are submitting this proposal for reserve study services for **Epperson Ranch II CDD**. The site analysis will be scheduled as soon as we receive the signed agreement (attached) to proceed. Our report is issued as a Reserve Management Plan engagement and is intended to match your budget year and will be a 30-year projection for the 30-year period beginning **October 1, 2025**.

Since maintenance expenditures are often the most significant costs of an association, properly preparing a Reserve Study is one of the most important responsibilities for common interest organizations. An accurate and detailed analysis will minimize reserve assessments and reduce the risk of insufficient funds, while still maintaining the common areas. Some consider the reserve study simply as a budget tool. Others want a dynamic long-term replacement management tool. Either way, we can help.

Capital Reserve Advisors:

- **Local:** Located in Tampa, FL for your convenience and unrivaled customer service.
- **Experts:** Lynn Sallee, RS, CMM, PRA, and CPSI designations with 48 years of construction experience and 11 years of Reserve Study deliveries.
- Pierre del Rosario has provided financial services to condominium and homeowners associations clients since 2000.
- **Vetted:** Capital Reserve Advisors uses software specifically designed to prepare reserve studies that has been fully tested by a team of independent financial experts for calculation accuracy and certified to meet the strict ICBI software standards and is used by more than 3,000 satisfied clients worldwide.
- **Easy:** Reserve Study Reports that are usually less than 30 pages makes it easy for boards of directors and management professionals to read, digest and distribute. Our report provides actionable management information that is detailed enough to understand, but not so detailed that it overwhelms the reader. This report is supplemented by separately issued detail financial schedules to provide a complete reserve activity management system.
- **Affordable:** We believe in using the latest technology to our advantage. Because we have continued to evolve our business practices by staying ahead of the curve with our software, we are able to pass on the savings to our clients.
- **Full Service:** Each of our on-site analyses includes everything you have come to expect from reserve study providers. Full component detail lists with site or element photos, current and future replacement cost estimates, and anecdotal evidence and/or commentary where necessary.
- **Full Service +:** At no extra charge, we also prepare the report with the understanding that every association is unique. Our reports are prepared for the association but also, **by the association**. This includes open communication, *unlimited revisions, and *client-use software.

Fee Quotation

The fee for preparing the reserve study with on-site analysis for the fiscal period starting **October 1, 2025** is **\$ 5,950**.

If you would like us to proceed with your reserve study, please indicate your acceptance by signing the attached Reserve Study Services Agreement and returning it to us. The terms of this proposal will remain in effect for sixty days from the date of this proposal.

Pierre del Rosario, President

Attachment

*See attached agreement for terms of service
See attached brochure for complete information about our company



Capital Reserve Advisors

14502 N Dale Mabry Hwy. Suite 200. Tampa, FL 33618
pierre@capitalreserveadvisors.com
www.capitalreserveadvisors.com
(813)444-8022

July 29, 2025

Alize Aninipot
Epperson Ranch II CDD
C/O Inframark
Wesley Chapel, FL 33545

Reserve Study Services Agreement Reserve Study with On-Site Analysis

This Agreement is made between Capital Reserve Advisors ("CRA") and **Epperson Ranch II CDD**, (the "Association"). The Association has engaged Capital Reserve Advisors to perform and prepare an analysis and projection of the Association's replacement funding program ("Reserve Study") pursuant to the terms and conditions as set forth herein.

IT IS AGREED:

1. **Analysis Date and Period:** The Reserve Study will be a projection for the 30-year period commencing **October 1, 2025**.
2. **Date of Delivery of Requested Information:** A draft report will be available for review by the Association within two weeks from the date of CRA's receipt of the applicable documents, information, and materials requested, and completion of the site analysis by CRA. The Reserve Study will assume the most probable course of events in consideration of information supplied by the Association, CRA's research, and industry standards and guidelines. However, the Association acknowledges that actual replacement costs may vary from those set forth in the Reserve Study and such variations may be material. Accordingly, CRA does not, and shall not, guarantee that actual replacement costs and/or remaining lives will approximate those contained in the Reserve Study.

CRA hereby requests the information and documents described on Schedule A attached to this Agreement.

The Association covenants and agrees to provide CRA with all the information and documents set forth on Schedule A, and to cooperate with all reasonable requests of CRA in connection with this Agreement. Without limiting the foregoing, the Association shall ensure that its personnel are reasonably available to consult with CRA regarding replacement funding expenditures and the condition of the physical components of the common areas and shall allow CRA reasonable access to conduct periodic physical inspections of the Association's facilities and common areas.

3. **Date of Delivery of Final Report:** The final report will be issued within seven working days of receiving approval from the Association for issuance of such report. The Reserve Study shall be dated as of the date of delivery to the Association (the "Report Date"). If the Association does not inform CRA of any changes within 30 days of delivery of the draft report, then the draft report is considered to be approved as is, and CRA will issue the final report.

4. **Report Format:** The format of the Reserve Study will be similar to the sample report available on our web site at <http://www.capitalreserveadvisors.com>. The purpose of the Reserve Study is to assist the Association in properly managing replacement funds and common area property, so that future funds will be sufficient when expenditures are necessary and common area property can be maintained efficiently for the life of the project. The Reserve Study is intended only for the Association's internal use, and only for the purposes, and subject to the limitations described in this Agreement.
5. **Reserve Study Update:** CRA has no responsibility to update the final Reserve Study for events and circumstances occurring after the Report Date. CRA recommends that interim updates be performed at least annually and at more frequent intervals if there are material fluctuations in the rates of inflation and investment or when material changes in costs or in estimated lives of replacement fund items occur.
6. **Reserve Study Fee & Terms:** CRA's fee for preparing the Reserve Study, with site analysis, for the period beginning **October 1, 2025** is **\$ 5,950**. 50% of this fee will be billed upon authorization to proceed and is due and payable at that time. The remaining 50% will be billed upon delivery of the draft report and is due and payable within 30 days. If a draft report is not issued at the request of the Association, the remaining 50% is due and payable within 30 days of importing data into software.
7. **No Warranties:** The Association acknowledges and agrees that neither CRA, nor any officer, director, owner, employee, agent or affiliate of CRA, has made any representations, warranties, guarantees, or promises of any kind regarding CRA's services or deliverables except as expressly provided in this Agreement. CRA disclaims all warranties, including without limitation any warranty as to fitness of the Reserve Study for a particular purpose, whether express, implied or arising by operation of law. CRA shall not be liable to the Association for any incidental, consequential, or special damages whatsoever, including without limitation any lost revenues or lost profits, arising from or related to this Agreement and the services provided hereunder.

8. **Miscellaneous:**

- (a) Entire Agreement. This Agreement embodies the entire agreement and understanding between the parties with respect to its subject matter, and supersedes all prior agreements, whether written or oral, pertaining to such subject matter.
- (b) Governing Law. Disputes arising under this agreement (including the scope, nature and quality of services to be performed by us, our fees and other terms of the engagement) shall be submitted to mediation. A competent and impartial third-party, acceptable to both parties, shall be appointed to mediate, and each disputing party shall pay an equal percentage of the mediator's fees and expenses. No suit or arbitration proceedings shall be commenced under this agreement until at least 60 days after the mediator's first meeting with the involved parties. If the dispute requires litigation, the court shall be authorized to impose all defense costs against any non-prevailing party found not to have participated in the mediation process in good faith. This Agreement is governed by, and shall be construed in accordance with, the laws of the State of Florida. Venue for all legal or equitable actions relating to or arising from this Agreement shall be Hillsborough County, Florida.
- (c) Force Majeure. Notwithstanding anything to the contrary provided in this Agreement, CRA shall not be liable for any delay or failure to perform any of its obligations under this Agreement if such delay or failure is caused by an act of god, government requirements, fire, or any other cause or circumstance beyond its reasonable control. CRA shall use reasonable efforts to avoid, remove, or cure all such circumstances as soon as is reasonably feasible.
- (d) Third Party Actions. If there are any member or third party actions involving the Association which cause CRA to incur time charges or expenses other than for the initial preparation of the reserve study report, CRA is to be reimbursed by the Association for any costs or time charges incurred in connection therewith.

9. **Limitations of Reserve Study** Association understands and agrees that:

- (a) The Reserve Study is intended for the sole use of the Association and is not to be construed as a guarantee, warranty or an opinion on the advisability of purchase.
- (b) The information provided by the Reserve Study is effective for one year from the completion date of the report. An annual review and update of this Reserve Study is required to adjust known cost changes and to maintain accuracy.
- (c) CRA 's financial liability for errors and omissions is limited to the fees charged to Association to perform the Reserve Study.
- (d) The scope of the Reserve Study is expressly limited to the components included.
- (e) The remaining useful life estimates of the Reserve Study assumes normal weather conditions and does not factor in damage by flood, wind, storm, earthquake or other insurable events. The useful life estimates assume proper construction, installation, design plus adequate preventive maintenance. Improper construction, installation, design or failure to maintain will lead to shortened useful lives.
- (f) The cost estimates of the Reserve Study are based in current pricing for similar installations and materials and/or based in actual costs paid by Association. Future costs are subject to change according to supply and demand, material costs, effects of inflation and other forces which are not under CRA 's control.
- (g) The conclusions of the Reserve Study do not involve forensic or destructive testing of the components and were arrived at by either visual inspection and/or information provided by Association.
- (h) The Reserve Study is not intended to address or discover construction defects, asbestos, mold, water intrusion or lead paint. Association agrees to indemnify, defend and hold CRA harmless from all related claims.
- (i) Association warrants that the components, equipment and materials are constructed or assembled by qualified and licensed contractors according to manufacturer specifications and that the finished construction complies with all applicable building codes at the time of construction.

Approval of Agreement

Epperson Ranch II CDD:

By: _____

Date: _____

For Capital Reserve Advisors :

By:



Pierre del Rosario, President

July 29, 2025

Epperson Ranch II CDD- Schedule A Documents, Information, and Materials Requested

The table below provides a fairly comprehensive list of the documents and information we require in order to perform a comprehensive analysis for you and helps to improve the accuracy of the report. Our normal work process is:

- Phone call or email notification to schedule date for on-site analysis
- Summarize and evaluate data in my office, and research and estimate pricing of reserve activities
- Prepare a draft of the report and information for your edits and our discussion
- Conference call (if necessary) to discuss the data and report. This is your board's report and I want to walk you through it and make necessary adjustments so that you have the best information and a workable plan going forward.
- Edits based on our conference call and second draft (or final) report issued

#	Documents requested	Reason needed	Required	Done
1	A copy of the most recent prior reserve study, if available	This helps ensure that we will identify all components and may provide measurement information. It is also a good check for us on costing information.	No	
2	A copy of the most current financial statements of the Association that shows the current total of reserve funds, and the current budgeted amount to be transferred monthly to reserves	Necessary for us to know how much you are presently contributing to reserves, and to anticipate the following year's reserve contribution.	Yes	
3	A copy of the Association's budget for the most recent year	This is required UNLESS it is shown on the financial statements listed above (# 2)		
4	A copy of the Association's governing documents (CC&R's, etc.)	Only necessary if it discusses maintenance responsibility of Association		
5	Copies of prior paid invoices for repair and/or replacement of common area components	Very helpful information to help us make sure that cost data we reflect in the study represents actual, rather than estimated costs.		
6	Copies of bids solicited for repair and/or replacement of common area components, whether awarded or not	Very helpful information to help us make sure that cost data we reflect in the study represents actual, rather than estimated costs.		
7	A copy of your reserve policies	Required if you have specific reserve policies. If not, we will be happy to help you establish policies for your Association.		
8	A list of addresses and phone numbers for pertinent service contractors (landscape, pool, elevator, roof, paint, deck, etc.)	Very helpful information to help us make sure that we have accurate cost data and an understating of your maintenance plan.		
9	A copy of the plot map of the project or community showing phasing details and building shapes or styles	This is necessary for us to identify all components.	Yes	
10	Temporary use of keys, access devices or gate codes to enter upon the common areas, pool or recreation areas and equipment or storage areas	Necessary for us to gain access to restricted areas.	Yes	

Additional information may be requested once we have started our work.



Property Wellness Reserve Study Program Proposal Level I Reserve Study

201 E. Kennedy Boulevard, Suite 1150
Tampa, Florida
(800) 980-9881
reserveadvisors.com

Epperson Ranch II Community Development
District
Wesley Chapel, FL



Reserve Advisors

Your Property Wellness Consultants



Our Property Wellness Reserve Study Program

Your home is the most expensive personal property you will ever own. The responsibility for preserving its value reaches beyond your home to include the spaces you share with your neighbors. Structures, systems, streets and amenities must be maintained to protect the value of your investment. But the required responsibility often stretches beyond individual knowledge and expertise. That's why associations and districts turn to Reserve Advisors. As your property wellness consultants, our reserve study helps community development districts understand their assets, expected lifespans, and both the budgets and maintenance needed to keep them in great working order.



A Proactive Property Wellness Program

Our engineers provide a thorough evaluation of your property and shared assets, and create a strong, informed plan to maximize your community's physical and financial wellness for the long haul. Because proactive care ensures that your shared property is cared for the way you would care for your home. We have been helping communities thrive for over 30 years. But the job we are obsessed with is making sure you and your neighbors have what you need to protect your property today, and prevent costly and avoidable repairs tomorrow. It is the best way to care for the place that makes you feel welcome, safe, secure and proud.



Helping Communities Thrive for Over 30 Years

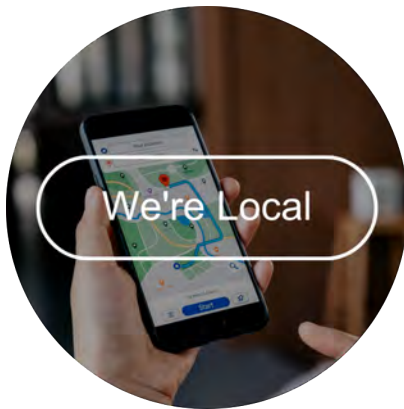
Reserve Advisors has prepared over 29,000 reserve studies for common interest realty associations nationwide. Our service area is one of the largest in the industry.

Through the leadership of our founders, John Poehlmann and Theodore Salgado, we helped pioneer the standards that all reserve study providers are measured by today. This success comes from our independence, extensive knowledge and experience. We pride ourselves on delivering unbiased recommendations that give community development districts the plans they need to ensure the future well-being of their property.

60+
ENGINEERS

29,000
RESERVE STUDIES CONDUCTED

300+
YEARS OF RESERVE STUDY EXPERIENCE



Local Conditions

Drawing upon our broad national experience, we recognize the profound impact local conditions have on the wear and tear of common property and subsequent replacement needs.

Local Costs

Our exclusive database of client project costs grants you real-time access to localized pricing, ensuring that your reserve study projections are not reliant on standardized costs.

Level I Full Reserve Study



	LEVEL I	LEVEL II	LEVEL III
	FULL RESERVE STUDY	RESERVE STUDY UPDATE WITH SITE-VISIT	RESERVE STUDY WITHOUT SITE-VISIT
		RESERVE STUDY PROCESS	
ONSITE VISUAL INSPECTION	✓	✓	
PRE-INSPECTION MEETING	✓	✓	
COMPONENT INVENTORY PLUS COMPONENT QUANTITIES & MEASUREMENTS	Established	Re-Assessed / Evaluated	Reflects prior study
CONDITION ASSESSMENTS	Based on visual observation	Based on visual observation	As reported by association
USEFUL LIFE ESTIMATES	Based on engineer's condition assessment	Based on engineer's condition assessment	Based on client's reported condition
VALUATION / COST ESTIMATES VIA PROPRIETARY BID DATABASE	Established for each reserve component	Re-evaluated for each reserve component	Re-evaluated for each reserve component
		KEY DELIVERABLES	
MEETS AND EXCEEDS CAI'S NATIONAL RESERVE STUDY STANDARDS	✓	✓	✓
PRIORITIZED LIST OF CAPITAL EXPENDITURES	✓	✓	✓
CUSTOMIZED RECOMMENDED FUNDING PLAN(S)	✓	✓	✓
RECOMMENDED PREVENTATIVE MAINTENANCE ACTIVITIES	✓	✓	
INCLUSION OF LONG-LIVED ASSETS	✓	✓	✓
ELECTRONIC REPORT	Comprehensive report with component detail	Comprehensive report with component detail	Executive summary overview
EXCEL SPREADSHEETS	✓	✓	✓
SUPPORT WITH IMPLEMENTATION OF REPORT	✓	✓	✓
COMPLIMENTARY REPORT REVISION	✓	✓	
UNCONDITIONAL POST-STUDY SUPPORT AT NO ADDITIONAL COST INCLUDING REPORT PRESENTATION	✓	✓	✓
	★ RECOMMENDED SERVICE LEVEL		

We are proposing a Level I Full Reserve Study. This service involves developing a component list and quantification of each item - a crucial aspect often overlooked by unqualified providers. This service is suitable for communities that have never undergone a reserve study, as well as those contemplating a change in reserve study providers. Conducting a Level I Reserve Study allows us to not only verify the accuracy of the component inventory and related quantities/measurements with certainty - the foundation of any reserve study - but to also present capital planning recommendations with unwavering confidence.

Property Wellness Reserve Study Program - Level I

Reserve Advisors will perform a Level I Reserve Study in accordance with Community Associations Institute (CAI) National Reserve Study Standards. Your reserve study is comprised of the following:

Physical Analysis: The reserve study consultant will develop a detailed list of reserve components, also known as a component inventory, and related quantities for each. We will complete a condition assessment or physical evaluation for each reserve component and the current condition of each will be documented with photographs. Life and cost estimates will be performed to determine estimated useful lives, remaining useful lives and current cost of repair or replacement.

Financial Analysis: The reserve study consultant will identify the current reserve fund status in terms of cash value and prepare a customized funding plan. The funding plan outlines recommended annual reserve contributions to offset the future cost of capital projects over the next 30 years.

Property Description

Epperson Ranch II Community Development District comprises 989 homes/lots. We've identified and will include the following reserve components:

Streets and Curbs, Irrigation System, Perimeter Walls/Fences, Post or Pole Lights, Sidewalks, Ponds (16), and other property specifically identified that you'd like us to include.

Scope of work includes all property owned-in-common as defined in your CDD's declaration and other property specifically identified that you'd like us to include.

Key Elements of Your Level I Property Wellness Reserve Study Program

Reserve Advisors' Exclusive Tools

Reserve Advisors' exclusive tools allow you to make informed decisions to maintain your CDD's long-term physical and financial health.



Reserve Expenditures

View your community's entire schedule of prioritized expenditures for the next 30-years on one easy-to read spreadsheet.

[View Example](#)

Funding Plan

Establishes the most stable and equitable recommended annual reserve contributions necessary to meet your future project needs.

[View Example](#)

Reserve Funding Graph

Highlights your community's current financial health and provides visibility to your projected cash flow over the next 30 years.

[View Example](#)

Component Specific Details

Including photographic documentation of conditions, project specific best practices outlining the scope of future projects, and preventative maintenance activities to maximize component useful lives.

[View Example](#)

Excel Spreadsheets

Empowering you to make more informed decisions by adjusting project schedules, future costs, and annual contributions in real time.

For Confidence in All Decisions

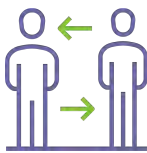


Personalized Experience Guarantee

As your trusted advisor, we are committed to providing clarity on the true cost of property ownership through a comprehensive reserve study solution and unmatched advisory services. If the experience we provide fails to live up to your expectations, contact us at any time for a refund.



Your property is your biggest investment. Here's why our solution is the best for your community:



Full Engagement

It's our job to understand your specific concerns and to discuss your priorities in order to ensure your reserve study experience exceeds expectations.



Detailed Understanding

We will do whatever it takes to ensure you have complete confidence in interpreting and putting into practice our findings and recommendations.



Ongoing Support

Unlike other firms, we provide current and future boards with additional insight, availability to answer questions and guidance well beyond report delivery.

The Time to Protect Your Property's Long-Term Health is Now

This proposal, dated 3/26/2025, for a Level I Property Wellness Reserve Study, is valid for 90 days.

To Start Your Property Wellness Level I Reserve Study Program Today:

1. Select the service options below to confirm scope of engagement

Service	Price
Reserve Study (Level I) This service includes a pre-project meeting to discuss your unique needs and priorities with our engineer. You'll receive: 1) a PDF report with 30-year expenditure and funding plan tables, 2) Excel spreadsheet with formulas, and 3) Complimentary support with implementation of your study and ongoing guidance. We provide ongoing, tailored support—at no additional cost. We'll meet with you to walk through your study, explain key recommendations, and answer any questions—ensuring you have the knowledge and confidence to make informed decisions for your community's long-term success.	\$6,600.00
Total	\$6,600.00

2. E-sign below

Signature: _____

Title: _____

Name: _____

Date: _____

For: Epperson Ranch II Community

Ref: 251236

Development District

3. Pay 50% retainer. An invoice will be emailed to you upon project authorization.

Mailing Address
Reserve Advisors, LLC
PO Box 88955
Milwaukee, WI 53288-8926

ACH
Send Remittances to 'accounting@reserveadvisors.com' at time of payment
Checking Account Number: 151391168
Routing Number: 075905787
Financial Institution: First Business Bank
17335 Golf Parkway, Suite 150 | Brookfield, WI 53045

You will receive your electronic report approximately four (4) weeks after our inspection, based on timely receipt of all necessary information from you. Authorization to inspection time varies depending on demand for our services. This proposal, dated 3/26/2025, is valid for 90 days, and may be executed and delivered by facsimile, portable document format (.pdf) or other electronic signature pages, and in any number of counterparts, which taken together shall be deemed one and the same instrument. One complimentary hard copy report is available upon request.

Professional Service Conditions

Our Services - Reserve Advisors ("RA" or "us" or "we") performs its services as an independent contractor in accordance with our professional practice standards and its compensation is not contingent upon our conclusions. The purpose of our reserve study is to provide a budget planning tool that identifies the current status of the reserve fund, and an opinion recommending an annual funding plan, to create reserves for anticipated future replacement expenditures of the subject property. The purpose of our energy benchmarking services is to track, collect and summarize the subject property's energy consumption over time for your use in comparison with other buildings of similar size and establishing a performance baseline for your planning of long-term energy efficiency goals.

Our inspection and analysis of the subject property is limited to visual observations, is noninvasive and is not meant to nor does it include investigation into statutory, regulatory or code compliance. RA inspects sloped roofs from the ground and inspects flat roofs where safe access (stairs or ladder permanently attached to the structure) is available. Our energy benchmarking services with respect to the subject property is limited to collecting energy and utility data and summarizing such data in the form of an Energy Star Portfolio Manager Report or any other similar report, and hereby expressly excludes any recommendations with respect to the results of such energy benchmarking services or the accuracy of the energy information obtained from utility companies and other third-party sources with respect to the subject property. The reserve report and any energy benchmarking report (i.e., any Energy Star Portfolio Manager Report) (including any subsequent revisions thereto pursuant to the terms hereof, collectively, the "Report") are based upon a "snapshot in time" at the moment of inspection. RA may note visible physical defects in the Report. The inspection is made by employees generally familiar with real estate and building construction. Except to the extent readily apparent to RA, RA cannot and shall not opine on the structural integrity of or other physical defects in the property under any circumstances. Without limitation to the foregoing, RA cannot and shall not opine on, nor is RA responsible for, the property's conformity to specific governmental code requirements for fire, building, earthquake, occupancy or otherwise.

RA is not responsible for conditions that have changed between the time of inspection and the issuance of the Report. RA does not provide invasive testing on any mechanical systems that provide energy to the property, nor can RA opine on any system components that are not easily accessible during the inspection. RA does not investigate, nor assume any responsibility for any existence or impact of any hazardous materials, such as asbestos, urea-formaldehyde foam insulation, other chemicals, toxic wastes, environmental mold or other potentially hazardous materials or structural defects that are latent or hidden defects which may or may not be present on or within the property. RA does not make any soil analysis or geological study as part of its services, nor does RA investigate vapor, water, oil, gas, coal, or other subsurface mineral and use rights or such hidden conditions, and RA assumes no responsibility for any such conditions. The Report contains opinions of estimated replacement costs or deferred maintenance expenses and remaining useful lives, which are neither a guarantee of the actual costs or expenses of replacement or deferred maintenance nor a guarantee of remaining useful lives of any property element.

RA assumes, without independent verification, the accuracy of all data provided to it. Except to the extent resulting from RA's willful misconduct in connection with the performance of its obligations under this agreement, you agree to indemnify, defend, and hold RA and its affiliates, officers, managers, employees, agents, successors and assigns (each, an "RA Party") harmless from and against (and promptly reimburse each RA Party for) any and all losses, claims, actions, demands, judgments, orders, damages, expenses or liabilities, including, without limitation, reasonable attorneys' fees, asserted against or to which any RA Party may become subject in connection with this engagement, including, without limitation, as a result of any false, misleading or incomplete information which RA relied upon that was 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 or to whom you provided the Report. NOTWITHSTANDING ANY OTHER PROVISION HEREIN TO THE CONTRARY, THE AGGREGATE LIABILITY (IF ANY) OF RA WITH RESPECT TO THIS AGREEMENT AND RA'S OBLIGATIONS HEREUNDER IS LIMITED TO THE AMOUNT OF THE FEES ACTUALLY RECEIVED BY RA FROM YOU FOR THE SERVICES AND REPORT PERFORMED BY RA UNDER THIS AGREEMENT, WHETHER ARISING IN CONTRACT, TORT (INCLUDING NEGLIGENCE), STRICT LIABILITY OR OTHERWISE. YOUR REMEDIES SET FORTH HEREIN ARE EXCLUSIVE AND ARE YOUR SOLE REMEDIES FOR ANY FAILURE OF RA TO COMPLY WITH ITS OBLIGATIONS HEREUNDER OR OTHERWISE. RA SHALL NOT BE LIABLE FOR ANY SPECIAL, INDIRECT, INCIDENTAL, CONSEQUENTIAL, PUNITIVE OR EXEMPLARY DAMAGES OF ANY KIND, INCLUDING, BUT NOT LIMITED TO, ANY LOST PROFITS AND LOST SAVINGS, LOSS OF USE OR INTERRUPTION OF BUSINESS, HOWEVER CAUSED, WHETHER ARISING IN CONTRACT, TORT (INCLUDING NEGLIGENCE), BREACH OF WARRANTY, STRICT LIABILITY OR OTHERWISE, EVEN IF RA HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. IN NO EVENT WILL RA BE LIABLE FOR THE COST OF PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES. RA DISCLAIMS ALL REPRESENTATIONS AND WARRANTIES WHATSOEVER, EXPRESS OR IMPLIED OR OF ANY NATURE, WITH REGARD TO THE SERVICES AND THE REPORT, INCLUDING, WITHOUT LIMITATION, MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE.

Professional Service Conditions - Continued

Report - RA will complete the services in accordance with the Proposal. The Report represents a valid opinion of RA's findings and recommendations with respect to the reserve study and is deemed complete. RA will consider any additional information made available to RA within 6 months of issuing the Report and issue a revised Report based on such additional information if a timely request for a revised Report is made by you. RA retains the right to withhold a revised Report if payment for services was not tendered in a timely manner. All information received by RA and all files, work papers or documents developed by RA during the course of the engagement shall remain the property of RA and may be used for whatever purpose it sees fit. RA reserves the right to, and you acknowledge and agree that RA may, use any data provided by you in connection with the services, or gathered as a result of providing such services, including in connection with creating and issuing any Report, in a de-identified and aggregated form for RA's business purposes.

Your Obligations - You agree to provide us access to the subject property for an on-site visual inspection. You agree to provide RA all available, historical and budgetary information, the governing documents, and other information that we request and deem necessary to complete the Report. Additionally, you agree to provide historical replacement schedules, utility bills and historical energy usage files that RA requests and deems necessary to complete the energy benchmarking services, and you agree to provide any utility release(s) reasonably requested by RA permitting RA to obtain any such data and/or information from any utility representative or other third party. You agree to pay actual attorneys' fees and any other costs incurred to collect on any unpaid balance for RA's services.

Use of Our Report - Use of the Report is limited to only the purpose stated herein. You acknowledge that RA is the exclusive owner of all intellectual property rights in and relating to the Report. You hereby acknowledge that any use or reliance by you on the Report for any unauthorized purpose is at your own risk and that you will be liable for the consequences of any unauthorized use or distribution of the Report. Use or possession of the Report by any unauthorized third party is prohibited. The Report in whole or in part is not and cannot be used as a design specification for design engineering purposes or as an appraisal. You may show the Report in its entirety to the following third parties: members of your organization (including your directors, officers, tenants and prospective purchasers), your accountants, attorneys, financial institutions and property managers who need to review the information contained herein, and any other third party who has a right to inspect the Report under applicable law including, but not limited, to any government entity or agency, or any utility companies. Without the written consent of RA, you shall not disclose the Report to any other third party. By engaging our services, you agree that the Report contains intellectual property developed (and owned solely) by RA and agree that you will not reproduce or distribute the Report to any party that conducts reserve studies or energy benchmarking services without the written consent of RA.

RA will include (and you hereby agree that RA may include) your name in our client lists. RA reserves the right to use (and you hereby agree that RA may use) property information to obtain estimates of replacement costs, useful life of property elements or otherwise as RA, in its sole discretion, deems appropriate.

Payment Terms, Due Dates and Interest Charges - If reserve study and energy benchmarking services are performed by RA, then the retainer payment is due upon execution of this agreement and prior to the inspection by RA, and any balance is due net 30 days from the Report shipment date. If only energy benchmarking services are performed by RA, then the retainer payment is due upon execution of this agreement and any balance is due net 30 days from the Report shipment date. In any case, any balance remaining 30 days after delivery of the Report shall accrue an interest charge of 1.5% per month. Unless this agreement is earlier terminated by RA in the event you breach or otherwise fail to comply with your obligations under this agreement, RA's obligations under this agreement shall commence on the date you execute and deliver this agreement and terminate on the date that is 6 months from the date of delivery of the Report by RA. Notwithstanding anything herein to the contrary, each provision that by its context and nature should survive the expiration or early termination of this agreement shall so survive, including, without limitation, any provisions with respect to payment, intellectual property rights, limitations of liability and governing law.

Miscellaneous - Neither party shall be liable for any failures or delays in performance due to fire, flood, strike or other labor difficulty, act of God, act of any governmental authority, riot, embargo, fuel or energy shortage, pandemic, wrecks or delays in transportation, or due to any other cause beyond such party's reasonable control; provided, however, that you shall not be relieved from your obligations to make any payment(s) to RA as and when due hereunder. In the event of a delay in performance due to any such cause, the time for completion or date of delivery will be extended by a period of time reasonably necessary to overcome the effect of such delay. You may not assign or otherwise transfer this agreement, in whole or in part, without the prior written consent of RA. RA may freely assign or otherwise transfer this agreement, in whole or in part, without your prior consent. This agreement shall be governed by the laws of the State of Wisconsin without regard to any principles of conflicts of law that would apply the laws of another jurisdiction. Any dispute with respect to this agreement shall be exclusively venued in Milwaukee County Circuit Court or in the United States District Court for the Eastern District of Wisconsin. Each party hereto agrees and hereby waives the right to a trial by jury in any action, proceeding or claim

brought by or on behalf of the parties hereto with respect to any matter related to this agreement. We reserve the right to limit or decline refunds in our sole discretion. Refunds vary based on the applicable facts and circumstances.

On-Street Parking Permit No. _____

**PASCO COUNTY
PARKING PERMIT APPLICATION**

Mail To:

Building Construction Services Department
Central Permitting Division
West Pasco Government Center
8731 Citizens Drive, Suite 230
New Port Richey, FL 34654-5598

Telephone No. (727) 847-2411
Ext. 7802
Fax No. (727) 815-7000

Parking Permit for: _____
Reason/Event

Permission is hereby granted to: _____
Name

Of _____
Address of Permittee

Subdivision: _____	Telephone: _____
Date of Event(s): _____	Time(s): _____
_____	_____
_____	_____
_____	_____

No. of Vehicles: _____ From/To

Distance to Nearest Corner: _____

Is There a Fire Station within 150 feet? Yes: ☐ No: ☐

Is There a Fire Hydrant within 10 feet? Yes: ☐ No: ☐

The Board of County Commissioners (BCC) may place official signs prohibiting parking upon certain County rights-of-way or other areas under its jurisdiction upon the passage of a resolution, which designates the right-of-way or other area where such conduct is prohibited. Any individual, group, or organization holding an event may petition the County, through the County Administrator, for a permit to allow street parking for a specified number of automobiles and a specified amount of time. The permit shall not be for more than four days in any one calendar year and the Street-Parking Permit shall not be granted for the purpose of providing parking for a nonpermitted use in a residential district. Each petition shall be reviewed for compliance with traffic safety standards and traffic-circulation control, as well as for compliance with all County ordinances. The BCC has established a nonrefundable permit fee of \$30.00.

Signature: _____

Print Name

Parking is restricted to one side of the street only, and no driveways, roadways, or roadway intersections will be blocked. Parking of any vehicle shall not be in violation of Section 316.1945, Florida Statutes, Stopping or Standing Outside of Municipalities, and the Pasco County Land Development Code, Sections 106.32, 106.33, and 106.34 (attached).

Parking in any restricted area may be subject to enforcement procedures and will cause automatic revoking of the On-Street Parking Permit. It is the applicant's responsibility to ensure that parking is maintained in accordance with the above requirements.

PLEASE POST PERMIT BOARD IN AREA OBVIOUS TO LAW ENFORCEMENT PERSONNEL

Special Conditions: _____

Approved By: _____

Fee: \$30.00

BCS/CP Review: _____

Paid: _____

Check No. _____

BILL OF SALE

PROJECT: Meadow Ridge, Phase C

PCU PROJECT NO.: PCU04-102.64

PROJECT LOCATION: Curley Road & Welling Blade Loop

Meadow Ridge Owner, LLC (Grantor), in the County of Pasco, State of Florida, for
(Name of Developer)

valuable consideration, the receipt of which is hereby acknowledged, does hereby grant, sell, transfer, and deliver unto Pasco County (Grantee) the following:

All water and wastewater facilities to the point of delivery or connection, including water, sewer, reclaimed water lines, pipes, and related equipment (listed in Exhibit B) constructed in and for the development of Meadow Ridge, Phase C
(Name of the Project), located in the public rights-of-way and easements contained within the property described in the attached Exhibit A (which includes a legible legal description and sketch of the property on which the improvements are located). The said water and wastewater facilities are tabulated on the attached Exhibit B.

To have and to hold the same to Pasco County, Florida, and its successors and assigns, to their use forever.

And the Grantor hereby covenants with the Grantee that the Grantor is the lawful owner of the said goods, that they are free from all encumbrances, that the Grantor has good right to sell the same as aforesaid, and that the Grantor will warrant and defend the same against the lawful claims and demands of all persons.

IN WITNESS WHEREOF, the said Grantor has caused these presents to be executed, and hereunto set my hand, on this 25 day of July, 2025.

Signed, sealed, and delivered in the presence of:

GRANTOR:


NAME: Jennifer L. Batts

BY: 

NAME: _____
Print

NAME: John Ryan


NAME: KyAndre Holifield
Print

TITLE: Authorized Person

STATE OF FLORIDA }
 }ss:
COUNTY OF PASCO }

PROJECT NAME: MEADOW RIDGE PHASE C

PCU#04-102.64

PROJECT DEVELOPER/OWNER: MEADOW RIDGE OWNER, LLC

COMMUNITY DEVELOPMENT DISTRICT: EPPERSON RANCH II COMMUNITY DEVELOPMENT DISTRICT

I, Boyan V Pargov, P.E., a Professional Engineer registered in the State of Florida, with Registration No. 67706 acting as the engineer of record for the subject property located in Section 26, Township 25 South, Range 20 East, Pasco County, Florida; hereby certify that I have examined the construction plans and utility costs as shown below, and have determined that they are accurate for the purpose of determining the amount for Maintenance Guarantee required by the Pasco County Land Development Code.


(Attached Schedules Incorporated by Reference)

Schedule I	Amount
"A" - Water Distribution	\$115,285.67
"B" - Sanitary Sewer	\$186,669.42
"C" - Reclaimed Water Distribution	\$62,581.26
Total	\$364,536.35

Maintenance Bond Amount \$364,536.35 x 0.15 = **\$54,680.45**

Approved by:

Kyle Conard
Pasco County Utilities Service Department

**boyan v
pargov** 
Digitally signed by boyan v pargov
DN: C=US, O=Unaffiliated, dnQualifier=
A01410D000001917FB48DDA00044F7E,
CN=boyan v pargov
Reason: I am the author of this document
Location:
Date: 2024.12.05 14:47:57-05'00'
Foxit PDF Editor Version: 13.0.1
(SEAL)
Professional Engineer

12/30/2024

Date

Boyan V. Pargov, State of Florida,
Professional Engineer, License No. 67706

This item has been digitally
signed and sealed by
Boyan V. Pargov, P.E. on the date
indicated here.

Date

Printed copies of this document
are not considered signed and
sealed and the signature must be
verified on any electronic copies.

5-Dec-24

ENGINEERS ESTIMATE

PROJECT NAME: MEADOW RIDGE PHASE C

SCHEDULE: I A Water Distribution

UNIT	QUANTITY	DESCRIPTION	UNIT PRICE	TOTAL AMOUNT
LF	1574	8" PVC Water Main	\$21.63	\$34,045.62
LF	45	16" Steel Casing	\$755.56	\$34,000.20
EA	1	16" x 8" Tapping Sleeve and Valve	\$9,260.00	\$9,260.00
EA	6	8" Gate Valve	\$1,583.63	\$9,501.78
EA	20	8" MJ Fitting	\$335.00	\$6,700.00
EA	2	Fire Hydrant Assembly	\$4,365.19	\$8,730.38
EA	10	Single Service (Short)	\$307.66	\$3,076.60
EA	19	Double Service (Short)	\$410.23	\$7,794.37
EA	2	Single Service (Long)	\$371.83	\$743.66
EA	2	Double Service (Long)	\$456.00	\$912.00
EA	1	Blow-Off Assembly	\$521.06	\$521.06
SCHEDULE I A				\$115,285.67

ENGINEERS ESTIMATE

PROJECT NAME: MEADOW RIDGE PHASE C

SCHEDULE: I B Sanitary Sewer

UNIT	QUANTITY	DESCRIPTION	UNIT PRICE	TOTAL AMOUNT
LF	56	20" Steel Casing	\$1,855.36	\$103,900.16
LF	652	8" PVC Gravity (0'-6' Cut)	\$24.50	\$15,974.00
LF	110	8" PVC Gravity (6'-8' Cut)	\$24.95	\$2,744.50
LF	331	8" PVC Gravity (8'-10' Cut)	\$25.26	\$8,361.06
LF	94	8" PVC Gravity (10'-12' Cut)	\$27.11	\$2,548.34
EA	5	Sanitary Manhole (0'-6' Cut)	\$2,751.61	\$13,758.05
EA	2	Sanitary Manhole (6'-8' Cut)	\$2,938.15	\$5,876.30
EA	1	Sanitary Manhole (8'-10' Cut)	\$3,417.05	\$3,417.05
EA	1	Sanitary Manhole (10'-12' Cut)	\$3,667.56	\$3,667.56
EA	1	Sanitary Manhole Drop (0'-6' Cut)	\$4,205.25	\$4,205.25
EA	4	Single Service Connection	\$607.85	\$2,431.40
EA	25	Double Service Connection	\$791.43	\$19,785.75
SCHEDULE I B				\$186,669.42

ENGINEERS ESTIMATE

PROJECT NAME: MEADOW RIDGE PHASE C

SCHEDULE: I C Reclaimed Water Distribution

UNIT	QUANTITY	DESCRIPTION	UNIT PRICE	TOTAL AMOUNT
LF	1017	6" PVC Reclaimed Water Main	\$17.13	\$17,423.24
LF	56	12" Steel Casing	\$607.15	\$34,000.40
EA	1	16" x 8" Tapping Sleeve and Valve	\$2,611.00	\$2,611.00
EA	2	6" Gate Valve	\$1,060.72	\$2,121.44
EA	15	6" MJ Fitting	\$240.50	\$3,607.50
EA	3	Single Service (Short)	\$297.32	\$891.96
EA	4	Single Service (Long)	\$361.50	\$1,446.00
EA	1	Blow-Off Assembly	\$479.72	\$479.72
SCHEDULE I C				\$62,581.26

BILL OF SALE

PROJECT: _____

PCU PROJECT NO.: _____

PROJECT LOCATION: _____

(Name of Developer) (Grantor), in the County of Pasco, State of Florida, for

valuable consideration, the receipt of which is hereby acknowledged, does hereby grant, sell, transfer, and deliver unto Pasco County (Grantee) the following:

All water and wastewater facilities to the point of delivery or connection, including water, sewer, reclaimed water lines, pipes, and related equipment (listed in Exhibit B) constructed in and for the development of _____
(Name of the Project), located in the public rights-of-way and easements contained within the property described in the attached Exhibit A (which includes a legible legal description and sketch of the property on which the improvements are located). The said water and wastewater facilities are tabulated on the attached Exhibit B.

To have and to hold the same to Pasco County, Florida, and its successors and assigns, to their use forever.

And the Grantor hereby covenants with the Grantee that the Grantor is the lawful owner of the said goods, that they are free from all encumbrances, that the Grantor has good right to sell the same as aforesaid, and that the Grantor will warrant and defend the same against the lawful claims and demands of all persons.

IN WITNESS WHEREOF, the said Grantor has caused these presents to be executed, and hereunto set my hand, on this _____ day of _____, _____.

Signed, sealed, and delivered in the presence of:

GRANTOR:

BY: _____

NAME: _____
Print

NAME: _____

TITLE: _____

NAME: _____
Print

EXHIBIT A - SKETCH



THIS PROJECT LIES IN FLOOD ZONE "A, AE & X" ACCORDING TO FLOOD INSURANCE RATE MAPS FOR PASCO COUNTY, FLORIDA, FEDERAL EMERGENCY MANAGEMENT AGENCY (FEMA) - FLOOD INSURANCE RATE MAP (FIRM) COMMUNITY PANEL NO. 12101C0268F, DATED SEPTEMBER 26, 2014, AND ISSUED BY THE FEDERAL EMERGENCY MANAGEMENT AGENCY.

NOTE:
THIS EXHIBIT WAS PREPARED FOR ILLUSTRATIVE PURPOSES ONLY.
THE LATEST AVAILABLE DIGITAL AERIAL FILES HAVE BEEN USED
HOWEVER THIS MAY NOT ACCURATELY DEPICT CURRENT SITE
CONDITIONS. ADDITIONAL ENGINEERING, ENVIRONMENTAL
REVIEWS, FIELD SURVEYING AND DATA COLLECTION ARE
NECESSARY TO CORRECTLY PORTRAY ACTUAL SITE CONDITIONS.
THIS EXHIBIT IS SUBJECT TO CHANGE WITHOUT NOTICE BASED
ON THE ABOVE.

DATE OF PHOTO: 2017

DESCRIPTION: A PARCEL OF LAND LYING IN SECTIONS 26 AND 35,
TOWNSHIP 25 SOUTH, RANGE 20 EAST, PASCO COUNTY, FLORIDA, AND
BEING MORE PARTICULARLY DESCRIBED AS FOLLOWS:

COMMENCE AT THE SOUTHWEST CORNER OF SAID SECTION 26, RUN
THENCE ALONG THE SOUTH BOUNDARY OF SAID SECTION 26,
S. 89°49'22"E., A DISTANCE OF 1310.61 FEET TO THE POINT OF BEGINNING;
THENCE S. 00°54'21"E., A DISTANCE OF 2632.19 FEET TO A POINT ON THE
SOUTH BOUNDARY OF SAID SECTION 26, THENCE ALONG SAID
SOUTH RIGHT OF WAY LINE, S. 89°49'45"E., A DISTANCE OF 1359.82 FEET
TO A POINT ON THE WESTERLY RIGHT OF WAY LINE OF CURLEY ROAD;
THENCE ALONG SAID WESTERLY RIGHT OF WAY LINE THE FOLLOWING
CURVED COURSE, FIRST A TANGENT CURVE TO THE LEFT HAVING A
NON-TANGENT CURVE TO THE RIGHT HAVING A RADIUS OF 2831.79
FEET AND A CENTRAL ANGLE OF 04°16'08" (CHORD BEARING
S.13°11'55"W., 210.93 FEET), S.1°15°19'59"W., A DISTANCE OF 1958.20 FEET,
S.3°00'42"E., 431.82 FEET ALONG THE ARC OF A TANGENT
TO THE RIGHT HAVING A RADIUS OF 1041.61 FEET AND A CENTRAL
ANGLE OF 22°13'32" (CHORD BEARING S.26°26'55"W., 429.11
FEET); S.47°33'30"W., A DISTANCE OF 1041.61 FEET; THENCE
N.00°54'21"E., A DISTANCE OF 675.87 FEET TO A POINT ON THE
SOUTH BOUNDARY OF SAID SECTION 26, THENCE ALONG SAID
SOUTH BOUNDARY, N.89°40'12"W., A DISTANCE OF 20.00 FEET TO
THE POINT OF BEGINNING.

CONTAINING 65.385 ACRES, MORE OR LESS.

[illegible]

IS HEREBY GRANTED SPECIFICALLY TO GOVERNMENTAL AGENCIES TO REPRODUCE THIS DOCUMENTATION IN COMPLIANCE WITH F.S. CHAPTER 119.

Exhibit A – Legal Description

LEGAL DESCRIPTION:

A parcel of land lying in Sections 26 and 35, Township 25 South, Range 20 East, Pasco County, Florida and being more particularly described as follows:

COMMENCE at the Southeast corner of EPPERSON RANCH PHASE 6-1, according to the plat thereof, as recorded in Plat Book 81, Pages 1 through 10 inclusive, of the Public Records of Pasco County, Florida, for a **POINT OF BEGINNING**, also being a point on the North boundary of said Section 35, run thence along the East boundary of said EPPERSON RANCH PHASE 6-1, N.00°54'21"E., 1084.38 feet to the Southwest corner of MEADOW RIDGE PHASE A-1, according to the plat thereof, as recorded in Plat Book 85, Pages 93 through 99 inclusive, of the Public Records of Pasco County, Florida; thence along the Southerly boundary of said MEADOW RIDGE PHASE A-1, S.74°40'01"E., 934.70 feet to the Southeast corner of said MEADOW RIDGE PHASE A-1, also being the Westerly boundary of the (PUBLIC) Right-of-way for Curley Road (County Road 577), according to Florida Department of Transportation (F.D.O.T.) Right-of-way Map Section 1455-250; thence along said Westerly boundary of the (PUBLIC) Right-of-way for Curley Road (County Road 577), the following three (3) courses: 1) S.15°19'59"W., 314.32 feet to a point of curvature; 2) Southwesterly, 431.82 feet along the arc of a curve to the right having a radius of 1112.92 feet and a central angle of 22°13'52" (chord bearing S.26°26'55"W., 429.11 feet) to a point of tangency; 3) S.37°33'50"W., 832.63 feet; thence N.15°00'00"W., 528.25 feet to the **POINT OF BEGINNING**.

Containing 20.324 acres, more or less.