



Rizzetta & Company

Bexley Community Development District

**Board of Supervisors' Regular
Meeting
December 17, 2025**

**District Office:
5844 Old Pasco Road, Suite 100
Wesley Chapel, FL 33544
813-994-1001**

www.bexleycdd.org

BEXLEY
COMMUNITY DEVELOPMENT DISTRICT
16950 Vibrant Way, Land O'Lakes, Florida 34638

District Board of Supervisors	Joe Albert Stephen Babon Deneen Klenke Nancy Pettit Adam Saunders	Chairman Vice-Chairman Assistant Secretary Assistant Secretary Assistant Secretary
District Manager	Lisa Castoria	Rizzetta & Company, Inc.
District Counsel	Alyssa Wilson	Kutak Rock
District Engineer	Stephen Brletic	BDI

All cellular phones must be placed on mute while in the meeting room.

The Audience Comment portion of the agenda is where individuals may make comments on matters that concern the District. Individuals are limited to a total of three (3) minutes to make comments during this time.

Pursuant to provisions of the Americans with Disabilities Act, any person requiring special accommodations to participate in this meeting/hearing/workshop is asked to advise the District Office at least forty-eight (48) hours before the meeting/hearing/workshop by contacting the District Manager at (813) 994-1001. If you are hearing or speech impaired, please contact the Florida Relay Service by dialing 7-1-1, or 1-800-955-8771 (TTY) 1-800-955-8770 (Voice), who can aid you in contacting the District Office.

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

BEXLEY COMMUNITY DEVELOPMENT DISTRICT
DISTRICT OFFICE – Wesley Chapel, FL 813-994-1001
Mailing Address – 3434 Colwell Avenue, Suite 200, Tampa, FL 33614
WWW.BEXLEYCDD.ORG

December 10, 2025

Board of Supervisors
Bexley Community
Development District

FINAL AGENDA

Dear Board Members:

The regular meeting of the Board of Supervisors of the Bexley Community Development District will be held on **Wednesday, December 17, 2025, at 1:00 p.m.** at the Bexley Clubhouse, located at 16950 Vibrant Way, Land O' Lakes, Florida 34638. The following is the agenda for this meeting:

- 1. CALL TO ORDER/ROLL CALL**
- 2. AUDIENCE COMMENTS**
- 3. STAFF REPORTS**
 - A. Aquatic ReportTab 1
 - B. Landscape Inspection Report (under separate cover)
 - i. RedTree Response to LIS ReportTab 2
 - ii. RedTree Weekly UpdatesTab 3
 - iii. Discussion on Drip Line/Irrigation Report
 - iv. Discussion on Well Installation
 - C. District Engineer
 - i. Discussion on Pasco Road Maintenance
 - ii. Discussion on Stantec Mitigation Project
 - D. District Counsel
 - i. Discussion on Status of Juniper Items
 - ii. Discussion on Parcel Maintenance
 - E. General Manager Report.....Tab 4
 - F. District Manager Report.....Tab 5
- 4. BUSINESS ITEMS**
 - A. Consideration of RedTree Proposals Tab 6
 - B. Consideration of Reserve Study Proposals..... Tab 7
 - C. Discussion on Draft Resolution for Fishing Rules Change Tab 8
 - D. Update on Resident Park Survey
 - E. Discussion on Resident Communication Methods

5. BUSINESS ADMINISTRATION

- A. Consideration of the Minutes of the Board of Supervisors
Regular Meeting held on November 19, 2025.....Tab 9
- B. Consideration of Operation and Maintenance for
November 2025 (under separate cover)

6. SUPERVISOR REQUESTS

7. ADJOURNMENT

We look forward to seeing you at the meeting. In the meantime, if you have any questions, please do not hesitate to call us at (813) 994-1001.

Sincerely,
Lisa Castoria
Lisa Castoria
District Manager

Tab 1



Bexley Community Development District Waterway Inspection Report

Reason for Inspection:

Quality Assurance

Inspection Date:

12/2/2025

Prepared for:

Bexley
Community Development District

Prepared by:

Jacob Adams- Project Manager & Biologist
Doug Agnew- Senior Environmental Consultant

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Site Assessments

Pond 60

Comments:

Site Looks Good

The exposed sediment was previously treated for a minimal amount of Torpedograss or shoreline weeds. Positive results were observed from this treatment. No issues were observed with algae, submersed weeds, or shoreline weeds. The water level has continued to drop. An erosion spot filled in with mulch was observed, see left picture in the bottom.



Pond 62

Comments:

Site Looks Good

Pond 62 continues to look good. The water level has continued to drop. No issues were observed with algae, submersed weeds, or shoreline weeds. Previous shoreline weed treatments have been effective at minimizing invasive growth.



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Site Assessments

Pond 63

Comments:

Normal Growth Observed

A minimal amount of algae was observed around the shoreline perimeter. This growth was less than one bands. This new growth was recently treated and positive results were seen. No issues were observed with submersed weeds or shoreline weeds. The water level has continued to drop. A couple minor to mild erosion areas where observed.



Pond 64

Comments:

Site Looks Good

No issues were observed with algae, submersed weeds, or shoreline weeds. This site is clear of vegetation to allow water to flow freely. The water level is low.



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Site Assessments

Pond 65

Comments:

Site Looks Good

No issues were observed with algae, submersed weeds, or shoreline weeds. This site is clear of vegetation to allow water to flow freely. The water level is low.



Pond 66

Comments:

Site Looks Good

Previous treatments on this pond have targeted a minimal amount of Planktonic algae and shoreline weeds on the exposed sediment. These treatments have shown positive results. No issues were observed with algae, submersed weeds or shoreline weeds. Two couple minor erosion areas were observed along the southern and south eastern shoreline.



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Site Assessments

Pond 67

Comments:

Site Looks Good

Shoreline weeds and Torpedograss were targeted on previous treatments. No issues were observed with algae, submersed weeds, or shoreline weeds. This pond continues to look good and the water level is currently low. A minor erosion spot was observed in the south eastern corner of the pond.



Pond 68

Comments:

Normal Growth Observed

Overall pond 68 looks good. No issues were observed with algae, submersed weeds, or shoreline weeds. A very minimal amount of Slender Spike Rush was observed growing on the exposed sediment around the shoreline perimeter and was targeted for treatment recently. The water level is currently low.



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Site Assessments

Pond 69

Comments:

Site Looks Good

Previous treatment of minimal amounts of algae, Torpedograss, and shoreline weeds were targeted for treatment. Positive results have been seen from these treatments. No issues are currently observed with algae, submersed weeds, or shoreline weeds. The water level has continued to drop.



Pond 70

Comments:

Normal Growth Observed

A minimal amount of algae was observed on pond 70. This new growth will be targeted for treatment during the upcoming visits. No issues were observed with submersed weeds or shoreline weeds.



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Site Assessments

Pond 71

Comments:

Site Looks Good

A minimal amount of algae was treated previously and a reduction was seen. No issues were observed during this inspection. The water level has remained near a normal level. One minor erosion area was observed in the north western corner of the pond.



Pond 72

Comments:

Normal Growth Observed

A minor growth of Torpedograss, Pennywort, and a pod of Cattails was observed on pond 72. This new growth will be targeted for treatment during the upcoming December visits. No issues were observed with algae or submersed weeds. The water level has continued to drop.



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Site Assessments

Pond 73

Comments:

Site Looks Good

The ponds water level has continued to drop and is low, with many feet of exposed sediment around the shoreline. The perimeter native planting has shown slightly below expected growth. No issues were observed with algae, submersed weeds, or shoreline weeds. A few mild erosion areas were observed along the eastern shoreline.



Pond 74

Comments:

Site Looks Good

The large area of exposed sediment has been targeted for treatment of shoreline weeds while the water level is low. No issues were observed with algae, submersed weeds, or shoreline weeds.



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Site Assessments

Pond 75

Comments:

Site Looks Good

Pond 75 looks good overall. A minimal amount of algae is washed up on the exposed sediment. The water level is currently very low. No issues were observed with submersed weeds or shoreline weeds. The exposed sediment will continue to be targeted for Torpedograss and shoreline weeds. A Minor erosion area was observed in the south western corner.



Pond 76

Comments:

Site Looks Good

Algae was previously treated on pond 76 and positive results continue to be seen. The exposed sediment was received treatments for Torpedograss and other shoreline weeds. No issues were observed with algae, submersed weeds, or shoreline weeds. The water level is currently low.



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Site Assessments

Pond 77

Comments:

Site Looks Good

The previous algae treatments have maintained positive results in its reduction. The water level has continued to drop and as a result the exposed sediment will continue to be targeted for treatment of Torpedograss and other shoreline weeds. No issues were observed with algae, submersed weeds, and shoreline weeds.



Pond 78

Comments:

Site Looks Good

The water level has continued to drop on pond 78. The exposed sediment was treated previously for shoreline weeds and positive results were seen. Slender Spike Rush treatments performed previously have also continued to provide positive results. No issues were observed with algae, submersed weeds, or shoreline weeds.



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Site Assessments

Pond 79

Comments:

Normal Growth Observed

A new, minor growth of algae was observed around the shoreline perimeter. This new growth has been targeted for treatment. No other issues were observed with submersed weeds or shoreline weeds. The water level has remained low. A few mild erosion areas were observed along the northern and eastern bank.



Pond 80

Comments:

Site Looks Good

Pond 80 has continued to look good after previous minor algae treatments. No issues were observed with shoreline weeds on the exposed sediment, algae, or submersed weeds. The water level has remained at a low level. At the southern tip of the pond a small erosion spot was observed.



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Site Assessments

Pond 81

Comments:

Site Looks Good

The water level on pond 81 is low. Shoreline weed treatments were performed recently and positive results were seen. No issues were observed with algae, submersed weeds, or shoreline weeds. Mild erosion areas were observed along the Southern shoreline.



Pond 82

Comments:

Site Looks Good

The water level on pond 82 has remained low. No issues were observed with algae, submersed weeds, or shoreline weeds. Previous treatments that have occurred on this pond have targeted shoreline weeds and these treatments have been effective.



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Site Assessments

Pond 83

Comments:

Site Looks Good

Pond 83 has continued to remain at a low water level. No issues were observed with algae, submersed weeds, or shoreline weeds. Previously a minimal amount of shoreline weeds and Torpedograss were targeted for treatment on the exposed sediment and positive results were seen.



Pond 84

Comments:

Site Looks Good

Pond 84 has continued to remain at a low water level. No issues were observed with algae, submersed weeds, or shoreline weeds. Previously a minimal amount of shoreline weeds and Torpedograss were targeted for treatment on the exposed sediment and positive results were seen.



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Site Assessments

Pond 85

Comments:

Site Looks Good

A minimal amount of algae was targeted for treatment previously and this algae growth has been reduced. The remaining algae is decaying and will be further reduced. No issues were observed on the exposed sediment with shoreline weeds or with submersed weed. The water level is low.





Management Summary/Recommendations

The overall state of condition for ponds 60-85, as a whole, have remained in excellent condition. Any new growth occurring is being maintained to minimal amounts. Only a few ponds in this section have experienced a moderate amount of Algae or Slender Spike Rush growth the past few months. A timely response to this new growth with treatment has kept growth to a minimum.

Even with the recent significant rainfall that occurred on December 7th-8th, the pond levels on the Bexley ponds can be expected to continue to recede until we begin to receive regular precipitation again next Spring and Summer. As we continue through winter, new growth of algae and submersed weeds will slow down and be minimal.

As the pond levels continue to recede, the exposed sediment areas around the pond perimeters will continue to develop growth. Treatments will continue to include focusing on the exposed sediment areas around the shoreline perimeters to maintain minimal growth of shoreline weeds. Monitoring of these large exposed sediment areas for erosion will also continue and we will report any erosion areas of concern.

Advanced Aquatic remains committed to being proactive and providing professional, proper, and timely treatments. As a results of this, our goal to keep new growth of algae and invasive weeds to a minimum, to maintain an overall excellent condition of the ponds within the entire Bexley CDD community.

Thank you for your continued partnership and allowing Advanced Aquatic Services to provide all your aquatic and wetland management needs.

The very best to the CDD Board of Supervisors, Staff and residents of Bexley CDD for a wonderful Holiday and a Blessed New Year!

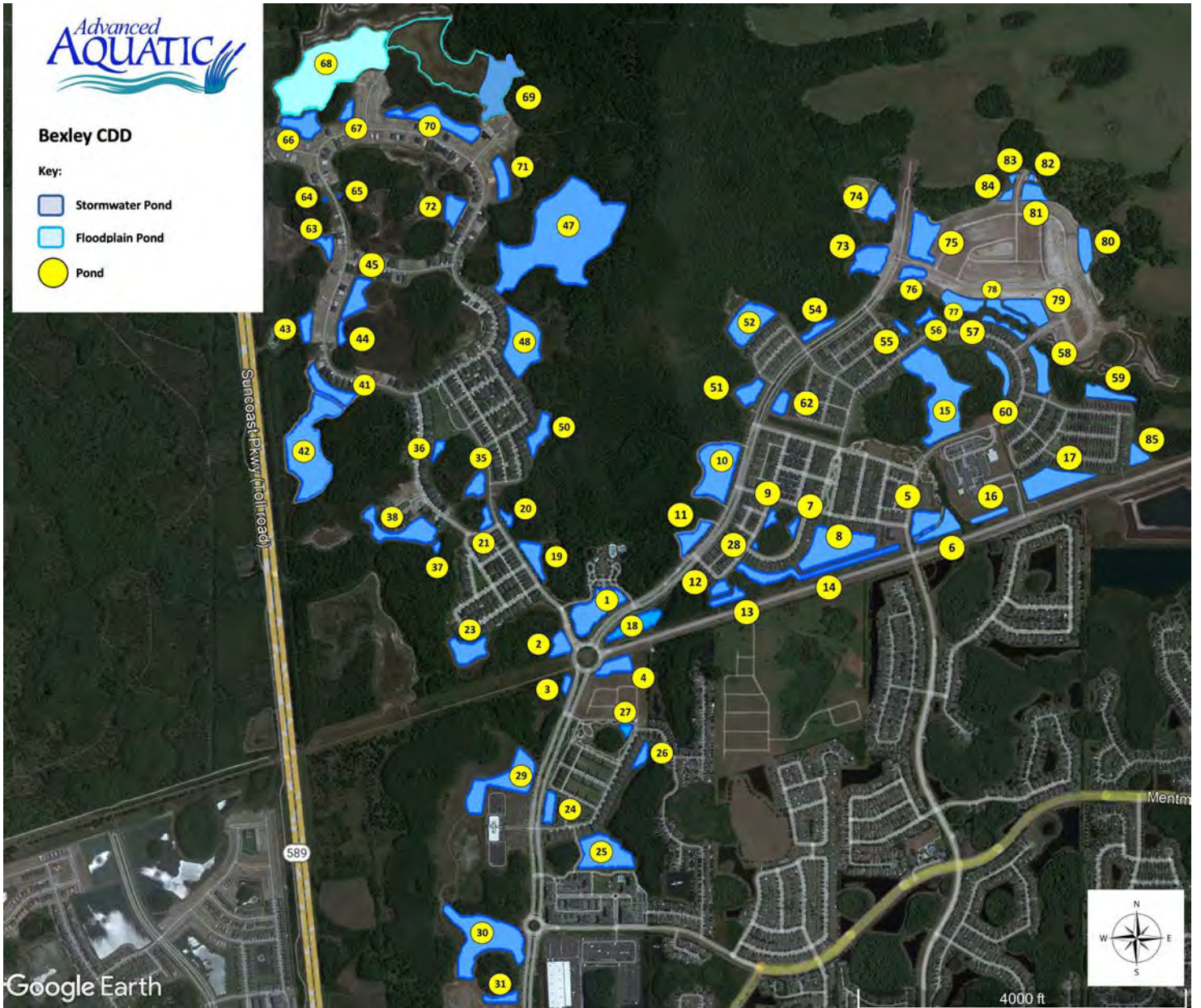
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Map



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Tab 2

BEXLEY

LANDSCAPE INSPECTION REPORT



November 7 & 9, 2025
Rizzetta & Company
John Toborg – Division Manager
Landscape Inspection Services



Rizzetta & Company
Professionals in Community Management

Summary, Upcoming Events, Bexley Village Drive, Mentmore

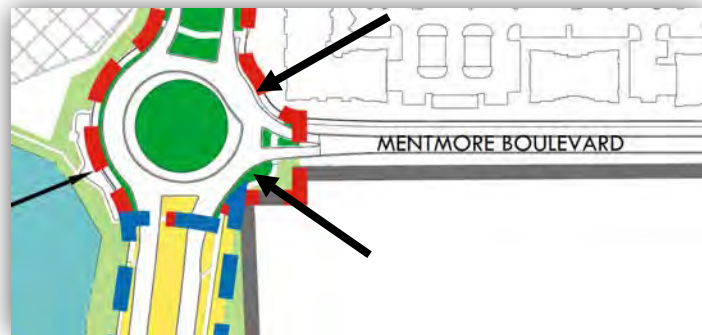
General Updates, Recent & Upcoming Maintenance Event

- During the month of November, RedTree shall apply: all Bermuda turf shall receive an application of 650 lbs. (13 - 50 lb. bags) of 19-3-7 fertilizer with a pre-emergent herbicide added. Additionally, all Palms shall receive an application of 1250 lbs. (25 – 50 lb. bags) of 8-2-12+4Mg fertilizer.
- Per contract, I request RedTree notify me and Staff at least five days ahead of each fertilization being applied and to check in with Staff the day of application so Staff can verify type, quantity and what the fertilizer is being applied to and then record this information on the label and scan it to me. PAYMENT FOR FERTILIZATION WILL NOT BE APPROVED WITHOUT PRIOR VERIFICATION.
- Extending compliments and my appreciation to RedTree for drastically improving the landscape throughout the entire community in a relatively short amount of time. The communication, performance and attention to detail of all staff involved is admirable and commendable.

The following are action items for RedTree to complete. Please refer to the item # in your response listing action already taken or anticipated time of completion. **Red text** indicates deficient from previous report. **Bold Red text** indicates deficient for more than a month. **Green text** indicates a proposal has been requested. **Blue** indicates irrigation. **Orange** is for Staff. **Bold underlined is either info or questions for the BOS.**

1. I want to make sure RedTree understands that the perimeter beds surrounding the Bexley Village Drive (BVD)/Mentmore roundabout are included in the maintenance scope. During this inspection, it was noted these beds were quite weedy, particularly the bed on the SE quadrant. Although the narrow strip on the NE quadrant is not colored dark green on the maintenance exhibit, it is also included in the maintenance scope.

(Pic 1> & below) - **Noted.**



2. Make sure the Gator Bag attached to the Sweet Gum on the west ROW of BVD at Moss Tree Loop still has a working flood bubbler inserted and attached to the gator bag so the bag fills every time the irrigation zone runs. As a precaution, make sure the water truck fills this at least twice a week. (Pic 2>)

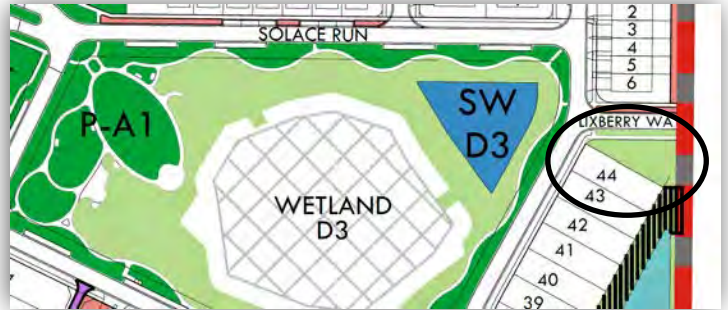
- In progress.

Bexley Village Drive, Lixberry, Balance Cove

3. Can we make sure there are no broken, misaligned irrigation heads on the southbound lanes side of the BVD median between Balance Cove and Moss Tree Loop. A large amount of water seems to be flowing over the curb. I noticed this last month as well. (Pic 3) - Weeping valve. Working on locating it



boundary graphic line covers up the eastern line of this area. There are vines in the hedges, and the bed lines are undefined. (Pic 6 & below) - Complete.



4. We may need to cut these Lantana at Balance Cove back. Make sure these get at least some water, although Lantana is pretty drought tolerant. (Pic 4>) - In progress.



5. How far will the water truck spray into parks, etc. I noticed that turf many of the parks are quite dry as well.

- The water truck sprays about 20 ft. anything further is handled with hoses.

6. Also, as a reminder, the triangular lawn and two hedges are the CDD's to maintain at Balance Cove & Lixberry. Unfortunately, the



7. Although this strip of land in Lot D is dark green on the maintenance exhibit, it is designated as Pasco County, meaning its maintenance responsibility falls on either the adjacent resident or the association. The graphic has been previously removed but reappeared at the last revision. (See >) - Noted.

Lot "D", Solace Run, Bud Bexley Parkway

8. Can RedTree implement a turf improvement program for the Lot "D" turf? It was allowed to decline over the past couple years. (Pic 8)



9. Along the Solace Run side of Gimme 10 Park, irrigation was running behind the curb and several heads were not popping up through the turf. (Pic 9) - In progress.



10. The recently cut Fakahatchee Grasses on the north side of BBP south of Yellow Brick Park are full of weeds. Now is a good time to eradicate them. (see below) - Complete.



11. For the record, someone has mowed the south ROW of BBP east of Ballantrae, but NOT the west side of Ballantrae between Ballantrae and Westwood. - In progress.

12. Now that the days are shorter and nights are cooler, warm season weeds will die off and the failed turf (here on the east ROW of Ballantrae) will become very apparent. (holdover) (Pic 12) - Noted.



Soccer Field, Aero Avenue, Jersey Pass

13. If there are any completely dead plants surrounding this weather station on the NW corner of the soccer field, please remove them. Then we can see what needs to be replaced. (Pic 13) - **Complete.**



14. Lift the trees adjacent to the walkway between the school and the homes on Cadence Loop. - **Complete.**

15. Has RedTree verified there is no fungal disease here in the middle of this Feijoa hedge by the lift station on Aero Avenue? (Pic 15) - **Complete.**



16. There are still tall weeds in the Feijoa on the south side of Lotus Lawn. - **Complete.**

17. Turf in the north ROW of Aero Avenue needs attention – insecticide? Fungicide? (see >) - **In progress.**

18. Can RedTree implement a turf improvement program for the turf in the sideyard turf adjacent to the resident at Jersey Pass & Ballantrae? It was allowed to decline over the past couple years. Poor turf continues all the way down the north side of Jersey Pass. (*holdover*) - **In progress.**

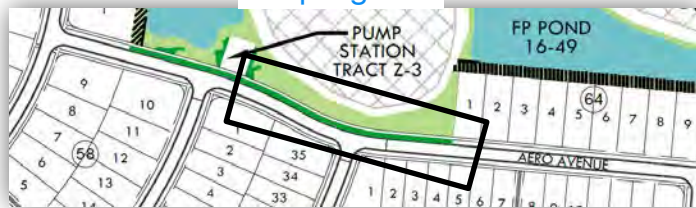
19. No improvement to the turf inside Ramble On Way south park. (*holdover*) - **Noted.**

20. Make sure the open mulch beds on the back side of Ramble On Way “pie park” are sprayed often. These were previously Perennial Peanut beds that remained flooded and died. (Pic 20) - **Complete and on going.**



21. As I thought, the previous vendor only line trimmed the weeds surrounding the lift station on Ramble on Way and they are back to taking over. RedTree to eradicate and remove these weeds. (Pic 21>) - **Complete.**

22. These Feijoa on the south side of Everlong approaching BVD still need to be removed, however, I would still like to know the reason for their decline ... Irrigation? Fungus? (Pic 22>) - **In progress.**



Wind Chime, Cruiser Bend/Tubular Run

23. Eradicate weeds and diagnose browning Juniper on the Wind Chime side of the “pie park”. - **Complete.**

24. Can RedTree flush cut and dispose of two declining Hollies in the Cruiser Bend buffer? Flush cut and invoice. (Pic 24>) - **Complete.**

25. The parallel parking space island beds along Cruiser Bend Park are very weedy. Trim back Jasmine behind the bench. (Pic 25>) - **In progress.**

26. For the record, the sideyard tract’s turf at Crusier Bend/Tubular Run is still awful looking. (*holdover*) However, I would like RedTree to confirm the Magnolias still have a working flood bubbler inserted into the Gator Bags and it is filling up every time the irrigation runs. (Pic 26>)



Bexley Village Dr. North

27. No turf improvement in the BVD median turf south of Breakaway. *(holdover)* (Pic 27)



32. Warm season weeds are dying and exposing the dreadful turf condition left behind by previous contractor – north ROW of Terrazzo. (Pic 32) - Noted.



28. No turf improvement in the BVD median & ROWs turf north of Everlong. *(holdover)* (Pic 28) - Noted.



29. Several of the BVD ROW landscape beds are being slowly overtaken by weeds and Torpedograss. (Pic 29>) - Complete.

30. Can the BOS approve paying someone to haul away this ever-growing debris pile at the northern end of BVD? (Pic 30>)

31. RedTree needs to make sure turf weeds are being treated on the BVD turf, bot on the median and ROWs. - Complete.



Game On Park, Balcony Breeze, Broad Porch Run

33. Please diagnose why the Feijoa is thinning at GameOn Park and treat accordingly.

- Complete.

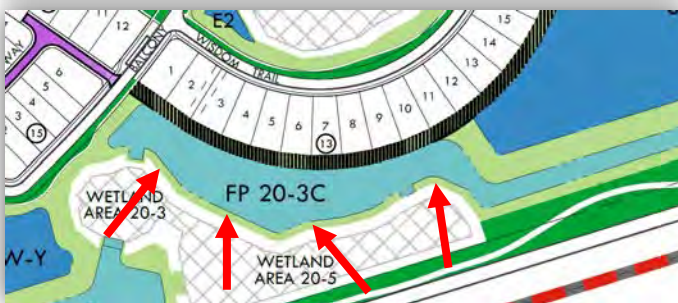
34. Please selectively prune the Ti Plants in the circular bed in Yellow Brick Park so that each clump has varying heights at all times.

- Complete.

35. Please make sure the south bank of Pond FP 20-3C east of Balcony Breeze, south of Wisdom Trail is mowed according to the scope of services – (weekly or bi-weekly, depending on the season. It was often neglected previously, and I do not want to see that happen again. (Pic 35 & below) - Complete.

38. Poor turf still exists on the west ROW of BPR north of Epic Cove (*holdover*) but declining turf is increasing on the east ROW as well. (Pic 38a & b)

- Noted.



36. Make sure all landscaping in the tract adjacent to the first home at the intersection of Courtyard Loop (south leg) and Broad Porch Run (BPR) are being maintained. Beds are still not very defined, are very weedy and tree rings are not being maintained. (Pic 36>)

- Complete.

37. Inspect defoliating landscape shrubs in the beds along BPR between the Courtyard Loops and treat accordingly. - Complete.



Broad Porch Run, Tour Trace, Winged Page Place

39. I can't imagine why there would be dollar weed in the BPR west ROW turf approaching BPR Park, but it is definitely there. Treat accordingly. - Treated.

40. Why are the landscape shrubs dying in the parallel parking space islands on the east side of BPR at Tuner Bend. Diagnose and treat accordingly. (Pic 40) - Treated.



41. All weeds need to be hand pulled from this parallel parking space island on the east side of BPR at Bravado. It is completely overrun! (Pic 41) - Complete.



42. Treat grassy weeds in the west ROW along BPR Park. - Complete.

43. Lift trees along the east side of BPR. - In progress.

44. Turf in the east ROW of Tour Trace (west leg) has been declining since long before the end of the previous vendor's tenure. Can RedTree identify the issue and treat accordingly? (holdover) - In progress.

45. Inspect these growing areas of bare turf in the lawn across from the Tour Trace lift station and treat accordingly. (Pic 45) -Treated.



46. Hand pull weeds from the Tour Trace lift station perimeter. - Complete.

47. Hand pull Spanish Needle from the Lacewood Ct. & Winged Page Place cul-de-sacs. - Complete.

48. Hand pull weeds from the Schilling's Holly in Chime After Chime Park. Make sure there is nothing more than foot traffic affecting this turf. (Pic 48) - In progress.

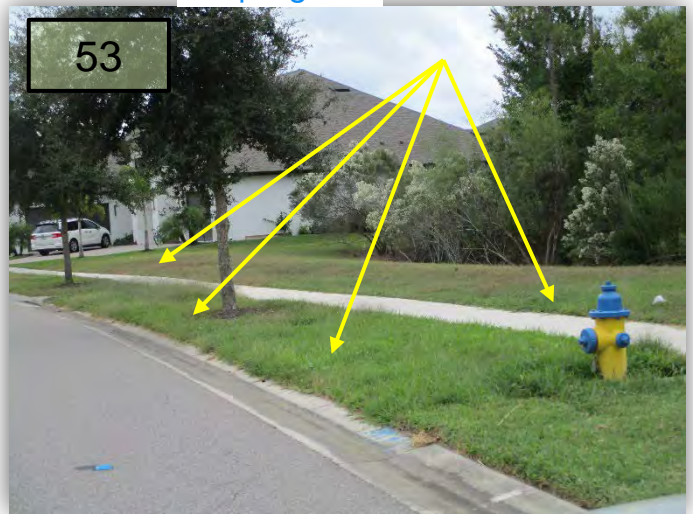


Frehley Way, Epic Cove, Acoustic Loop

49. We may need to inspect and treat for grubs in the turf across from Chime After Chime Park. There appears to be oddly spaced hog rutting. (Pic 49) - [treated](#).



53. This tract is still not being maintained on the west side of Epic Cove between Tour Trace and Acoustic Loop. This was in the previous report, but it was also called into RedTree. (Pic 53) - [In progress](#).



50. Inspect the brown Juniper in front of the mail kiosk. Diagnose (twig blight?) and treat accordingly and trim out the brown several inches into healthy wood. - [Treated](#).

51. Inspect the turf south of Chime After Chime, diagnose and treat accordingly. It is looking quite rough in the ROW as well as behind the sidewalk. (Pic 51) - [Treated](#).



54. Remove this tree bracing system on Acoustic Loop & de-moss trees. (Pic 54) - [Complete](#).



52. There is still the hill-valley-hill syndrome on the Frehley Way ROW turf causing fungus and scalping, however, there is also dollarweed. Alter mow patterns, mowers and treat for dollarweed. - [Treated](#).

55. There are still turf issues on both sides of Epic Cove leading to Blue Lantana. Poor turf continues onto Blue Lantana. (*holdover*) (Pics 55a & b>) - [In progress](#).

56. Turf on the south ROW of Blue Lantana Park is basically non-existent. This is an area that off and on has been in decline in the past. (Pic 56>) - [In progress](#).

Epic Cove, Blue Lantana Park

57. Although this is a (*holdover*) has anyone inspected this dead turf for mole crickets considering it is below a streetlight. (Pic 57>)

- In progress.

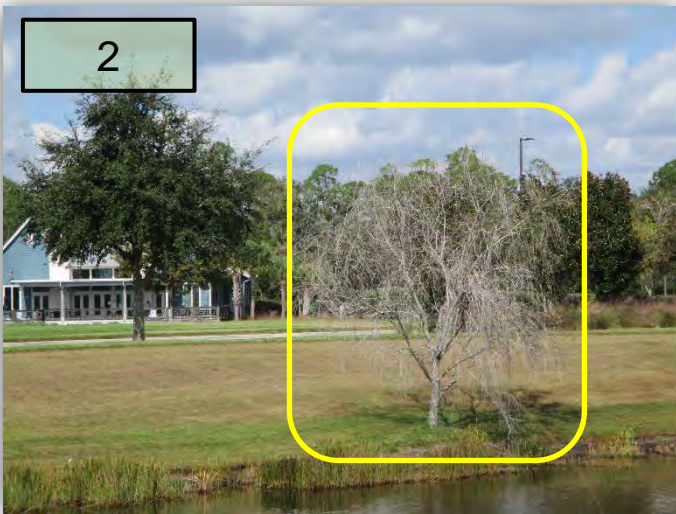


Proposals – (No, 23 in report is an Install & Invoice)

1. RedTree to provide a proposal to remove this dead Red Maple on the BVD median between Solace Run and Balance Cove and replace with a 3" caliper *Liquidambar styraciflua* 'Rotundiloba', Sweet Gum 'Rotundiloba'. Proposal must include a working flood bubbler, a 30 Gal. Gator Bag with the flood bubbler inserted through the top so the bag fills with every irrigation schedule. Bag must be placed inside an 8" – 10" earthen water saucer surrounding the rootball. (Pic 1)



2. RedTree to provide a proposal to completely remove this dead Weeping Willow on the pond bank between Bud Bexley Parkway (BBP) and BVD and replace with a 45 Gal., *Taxodium distichum*, Bald Cypress. Provide for a gator bag, flood bubbler and 8" – 10" level earthen saucer to retain water on a pond bank in the proposal. (Pic 2)



3. RedTree to provide two proposals:

The first proposal is to overseed the soccer field with winter rye seed once the evening temperatures are consistently in the 60's – (Thanksgiving ish.) We will need to email blast the community so that we can close the park for a couple weeks. So, we will need to have a specific date. **(do not apply any pre-emergent herbicide to this field any time soon)**

The second proposal is to core aerate the soccer field going into the spring so that soil amendments can be added once the core aeration has occurred and cores dragged out.

These proposals can be provided and approved simultaneously, but the core aeration is not to occur until spring – or we will have a polka dotted soccer field.

4. Since we never received the African Bush Daisy from the previous contractor at the Lotus Lawn mail kiosk planters, I am requesting a proposal from RedTree to install 3 Gal., FULL *Trachelospermum jasminoides*, Confederate Jasmine on 24" centers in this bed as well as the beds along Cadence Loop containing Crape Myrtles and an Oak. Once planted, everything needs to receive 1" of Pine Fines. (Pic 4)



Tab 3



The New Standard in Landscape Maintenance

RECAP REPORT

Client:	Bexley CDD
Week Of:	November 17th – 21st, 2025

Recipient Group			
Client Contacts		RedTree Contacts	
Lynn Hayes	LHayes@rizzetta.com	David Lucadano	daveluke@redtreelandscape.systems
Lisa Castoria	LCastoria@rizzetta.com	Pete Lucadano	peteluke@redtreelandscape.systems
John Toborg	JToborg@rizzetta.com	Robert Johnson	rjohnson@redtreelandscape.systems
		Service Desk	service@redtreelandscape.systems
		Office Admin	bchristensen@redtreelandscape.systems
		Ninoshka Torres	ntorres@redtreelandscape.systems

Service	ReCap
Mowing & Detailing	<ul style="list-style-type: none"> • Monday 11.17.25 <ul style="list-style-type: none"> - Trimmed Jasmines around and within the first roundabout. - Detailed the monument area at the main entrance off SR- 54 - Controlled trimming, Soft edging, burning out beds, weed spraying, and debris pickup at Gimme 10 Park and surrounding areas. • Tuesday 11.18.25 <ul style="list-style-type: none"> - Worked throughout the community parks and mail kiosk centers. - Trimmed hedges, soft-edged beds, burned out beds, and sprayed for weeds and crack weeds. - Mowing crew completed mowing in all areas scheduled for service, • Wednesday 11.19.25 <ul style="list-style-type: none"> - Began addressing areas listed in the inspection report (see Section 2 for details) - Completed trimming, soft edging, burning out beds, and weed control in all service areas. • Thursday 11.20.25 <ul style="list-style-type: none"> - Continued community-wide detailing alignment with inspection report tasks. - All areas serviced were trimmed, soft-edged, burned out, and sprayed for weeds and crack weeds.

<p style="text-align: center;">Inspection Report Items Addressed</p>	<ul style="list-style-type: none"> • Monday – November 17 <ul style="list-style-type: none"> - Noted that the Jasmine in the first roundabout was listed as our responsibility in the inspection report; completed this task accordingly. • Wednesday – November 19 <ul style="list-style-type: none"> - Began working through items listed in the inspection report. - Areas addressed included: <ul style="list-style-type: none"> ○ Soccer Field ○ Aero Avenue ○ Jersey Pass ○ Bexley Village Drive ○ Lixberry ○ Balanced Cove - Tasks completed in these inspection-identified areas: trimming, soft edging, burning out beds, and spraying for weeds/crack weeds. • Thursday – November 20 <ul style="list-style-type: none"> - Continued progressing through remaining inspection report items across multiple sections of the community.
<p style="text-align: center;">Pest Control & Fertilization</p>	<ul style="list-style-type: none"> • Tuesday 11.18.25 <ul style="list-style-type: none"> - Sprayed beds and crack weeds throughout parks and mail kiosks. • Wednesday 11.19.20 <ul style="list-style-type: none"> - Sprayed for weeds and crack weeds in all inspection report areas serviced. • Thursday 11.20.25 <ul style="list-style-type: none"> - Continued weeds and crack weed treatments in all areas visited.
<p style="text-align: center;">Irrigation</p>	<ul style="list-style-type: none"> • Inspection and repairs performed at the Controller on Ballantrae Blvd. • Inspection reports have been submitted for the completed and repaired Controllers.
<p style="text-align: center;">Arbor Care</p>	<ul style="list-style-type: none"> • No arbor care was completed at this time.
<p style="text-align: center;">Landscape</p>	<ul style="list-style-type: none"> • No landscape proposals were submitted at this time.



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Land O Lakes, FL, United States
 Route on Way, Suncoast Pointe, Land O Lakes, FL 34638, United States
 Lat 28.225176, Long -82.522897
 11/19/2025 12:16 PM GMT-05:00
 Note - Captured by GPS Map Camera



Land O Lakes, FL, United States
 Route on Way, Suncoast Pointe, Land O Lakes, FL 34638, United States
 Lat 28.226171, Long -82.522995
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 Note - Captured by GPS Map Camera



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 Note - Captured by GPS Map Camera



Land O Lakes, FL, United States
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 Note - Captured by GPS Map Camera



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 Note - Captured by GPS Map Camera



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 Note - Captured by GPS Map Camera

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Land O Lakes, FL, United States
 Westwind Place Pt. Westwind Place Condo, Land O Lakes, FL 34638, United States
 Lat: 28.229487, Long: -82.540129
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 Note: Captured by GPS Map Camera



Odessa, FL, United States
 Broad Porth Run, Westwind Place Condo, Odessa, FL 34638, United States
 Lat: 28.214034, Long: -82.538558
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 Note: Captured by GPS Map Camera



Land O Lakes, FL, United States
 Broad Porth Run, Westwind Place Condo, Land O Lakes, FL 34638, United States
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 Note: Captured by GPS Map Camera



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 Westwind Place Pt. Westwind Place Condo, Land O Lakes, FL 34638, United States
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 Note: Captured by GPS Map Camera



Odessa, FL, United States
 Broad Porth Run, Westwind Place Condo, Odessa, FL 34638, United States
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 Note: Captured by GPS Map Camera



Land O Lakes, FL, United States
 Westwind Place Pt. Westwind Place Condo, Land O Lakes, FL 34638, United States
 Lat: 28.229486, Long: -82.540298
 11/20/2025 11:22 AM GMT-05:00
 Note: Captured by GPS Map Camera

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The New Standard in Landscape Maintenance

RECAP REPORT

Client:	Bexley CDD
Week Of:	November 24th-26th,2025

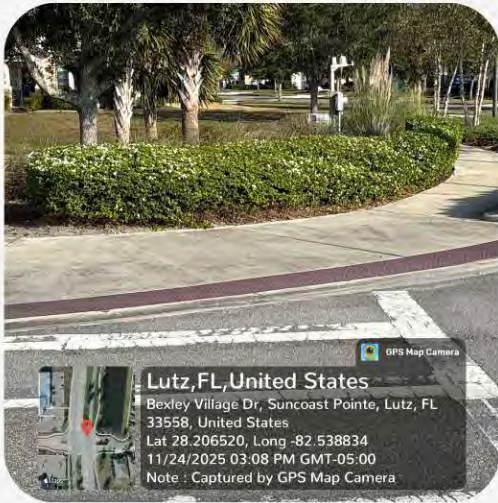
Recipient Group			
Client Contacts		RedTree Contacts	
Lynn Hayes	LHayes@rizzetta.com	David Lucadano	daveluke@redtreelandscape.systems
Lisa Castoria	LCastoria@rizzetta.com	Pete Lucadano	peteluke@redtreelandscape.systems
John Toborg	JToborg@rizzetta.com	Robert Johnson	rjohnson@redtreelandscape.systems
		Service Desk	service@redtreelandscape.systems
		Office Admin	bchristensen@redtreelandscape.systems
		Ninoshka Torres	ntorres@redtreelandscape.systems

Service	ReCap
Mowing & Detailing	<ul style="list-style-type: none"> Detailed high profile areas for better appearance during Thanksgiving week. <ul style="list-style-type: none"> Trimmed hedges Pulled weeds Burnt out beds Soft edged sprayed for weeds in beds and crack weeds along the road. Trimmed whipped burnt ends. Soft edged sprayed beds and crack weeds on Broad Porch Run and also the intersection of Bud Bexley Parkway and Ballantrae Boulevard.
Inspection Report Items Addressed	<ul style="list-style-type: none"> Fertilization concerns were addressed 11.26.25
Pest Control & Fertilization	<ul style="list-style-type: none"> IPM is being performed as needed.
Irrigation	<ul style="list-style-type: none"> Inspection and repairs performed at the Controller J on Terrazzo Way Inspection report have been submitted for the completed and repaired controllers Second roundabout zone is running

	<ul style="list-style-type: none"> • Soccer Field – irrigation running on field and more work to accomplish. Believe that there is a bad wire between zone 8 and 9 • Decoder changed across multiple controllers. • Watering truck reached hot spots throughout.
Arbor Care	<ul style="list-style-type: none"> • No arbor care was completed at this time.
Landscape	<ul style="list-style-type: none"> • No landscape proposals were submitted at this time.



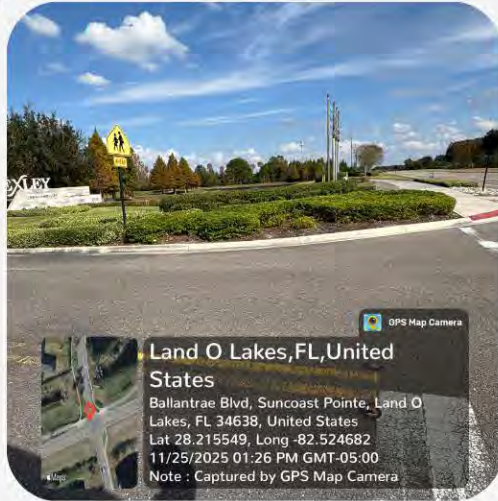
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Tab 4



**Bexley CDD
Board of Supervisors Meeting
12/17/2025**

General Manager's Report

Dear Board,

In November, the maintenance team made significant progress on various fronts, as detailed in Matt's attached report. I reviewed and approved the work plan at the start of the month, monitored progress through weekly check-ins, and confirmed all completed tasks.

Outstanding items have been prioritized for the upcoming period, but we are open to adjustments to align with the Board's priorities.

I wanted to share the proposed soccer field upgrades, where I've evaluated the Amazon estimate for replacement goals and a permanent backstop net totaling approximately \$901.01 (see attached estimate for details). This proactive approach ensures our facilities remain safe, functional, and enjoyable for all residents.

If you have any questions or require further discussion on these matters, please let me know.

Respectfully submitted by,

Jessica Rosa-Melendez, LCAM
General Manager

Enclosed November 2025 Maintenance Report
By Matt Browning

November Maintenance Report

Prepared by: Matt Browning

December 9, 2025

Dear Board of Supervisors,

This report summarizes the maintenance activities completed in the last week of October and the month of November, as well as outstanding items requiring attention. Ron and I addressed a range of tasks, and while progress was made, several larger projects remain pending. Below is a detailed overview.

Completed Tasks

- Stained the Broad Porch pergolas and swings. During the process, significant rot was identified in the wood beams, which were excised and replaced with new weather-treated lumber. Additionally, both 2x8 hinge mount boards on the Broad Porch pergola were replaced.

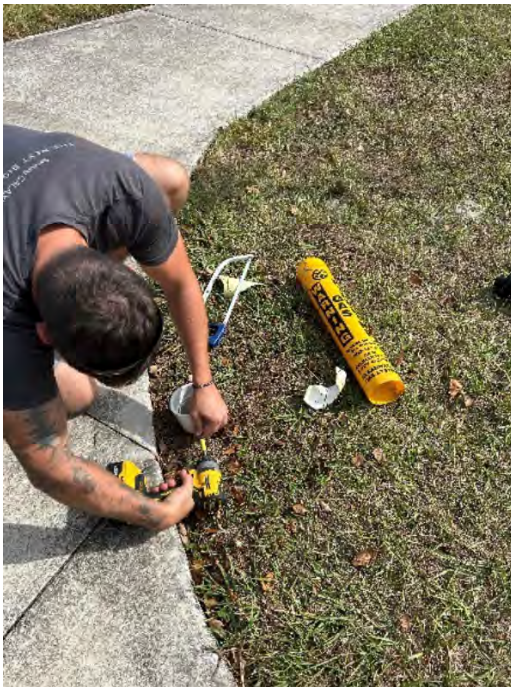




- Assisted Ron with repairs to the Café porch decking. Several additional issues with the deck were observed. I'll be assisting Ron with this project.
- Inspected the guard rail beams on Bexley Village Drive near the Amazon rotary. Due to rot, replacement beams will be ordered from Tibbetts; no external vendor is required as I'm partnering with Ron and we both feel we can do this project.
- Reorganized and cleaned the workshop, with all power tools inspected and confirmed operational. A new hose was ordered for the trailer-mounted pressure washer following an incident where the existing hose ruptured. An improved coiling system will be implemented to prevent future wear, and weekly quality control inspections will be mandated prior to equipment use.
- Conducted a post-Thanksgiving cleanup across Bexley, including removal of substantial trash at Broad Porch (e.g., boxes, cans, and bottles).
- Replaced the "Private Property" sign at the soccer field and repainted both signposts.



- Removed multiple instances of roadkill from Bexley Village Drive. Residents are encouraged to reduce speed for safety.
- Repaired the trash can at Gimme 10 Park near the mail kiosk.
- Cleared mower clippings from Blue Lantana Lane and removed damaged tree supports affected by mowing equipment.
- Removed debris at the Bexley Village dead end, including vehicle rims, cones, and miscellaneous items. We
- Cleaned the truck bed and performed the monthly quality control inspection (tires, fluids, brakes, suspension, air filter, cabin filter, lights), with all components in satisfactory condition.
- Cleaned the Phase 4 pool storage closet. We will use this area for CDD materials. A more efficient lumber storage solution is recommended, such as constructing a small shed behind the Main lap pool near the double-door gate for secure, accessible storage.
- Replaced the dog-waste station at Clay Pot / Tea Leaf Alley. We believe that many of the trash containers are being damaged by the riding mowers. Many are found with dents in areas consistent with damage created by riding equipment.
- Repaired the irrigation control panel on Courtyard Loop, addressing bent side panels and broken hinges that had been left open by Red Tree.
- Completed with Ron's assistance, repairs to the gas line, fiber optic pylons throughout the community. See attached photos.



- Replacement of downed pylon on Bexley Village Drive & Frehley Run / Tour Trace.

- Repairs of the Dog Park trash can.



- The soccer field goals are currently chained together but exhibit rust and jagged edges, posing a safety hazard. I recommend replacing both goals and nets prior to reopening the field.



Options reviewed on Amazon include a pair of Vallerta Match 24 x 8 FT official regulation soccer goals at \$345.51 each and a Stop That Ball backstop net system for \$209.99, totaling \$901.01 for the three items. A permanent backstop net installation could also be considered to prevent balls from escaping the area and prevent additional damage to the BMX park fence.

- The soccer field benches were found vandalized and broken following field closure; temporary repairs have been made, but new wood will be required in the near future.



Benches Repaired:



- Graffiti on a utility box requires attention; pressure washing is not advisable due to safety concerns. Clarification is needed on whether we can proceed with painting or do we must notify the county/utility provider.



Please let me know if additional details are required or if we should discuss prioritization of these items.

Best regards,

Matt Browning

Shopping Cart

Price



Stop That Ball™ Backstop Net Systems |
Multi-Sport Ball Stop Net & Posts | Pop-Up,

\$209.99

In Stock

Shipped from: [Net World Sports USA](#)

\$41.99 delivery **Dec 22 - 30**

Style: Socketed

Size: 10ft

1

Delete

Save for later

Share



Vallerta® Match 24 X 8 FT. Official Regulation
Size Soccer Goal. Strongest Heavy Duty 2"

\$345.51

[Business Price](#)

In Stock

Shipped from: [Petra Sports & Leisure](#)

FREE delivery **Mon, Dec 15**

Style: (1 NET) 24' X 8' Match Goal

Buy 5, save 5%

2

Delete

Save for later

Share

Subtotal (3 items): **\$901.01**

The price and availability of items at Amazon.com are subject to change. The Cart is a temporary place to store a list of your items and reflects each item's most recent price. [Learn more](#)

Tab 5



Rizzetta & Company

UPCOMING DATES TO REMEMBER

- **Next Regular Meeting:** January 28, 2026 @ 1:00 PM

**District
Manager's
Report**

December 17

2025

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<u>FINANCIAL SUMMARY</u>	<u>10/31/2025</u>
General Fund Cash & Investment Balance:	\$1,377,459
Reserve Fund Cash & Investment Balance:	\$585,114
Debt Service Fund Investment Balance:	<u>\$3,610,754</u>
Total Cash and Investment Balances:	\$5,573,327
General Fund Expense Variance: \$5,386	Under Budget



Rizzetta & Company

- Fallen tree in pond removed
- Overseeding project completed
- Shade repair completed
- CDD share drive created
- Reserve study examples disseminated

Tab 6



The New Standard in Landscape Maintenance

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5532 Auld Lane, Holiday FL 34690

**REVISED: MULCH & PINE STRAW INSTALLATION PROPOSAL
FOR
Bexley CDD**

Attention: Lisa Castoria, District Manager

December 9, 2025

Scope of Work: As referenced in the existing Landscape Maintenance Contract:

INSTALLATION OF MULCH

After prior approval by the Board of Supervisors, Contractor shall top dress all currently landscaped areas as shown on the maintenance map (landscaped beds & tree rings) with Medium Pine Bark Mulch, Shredded Hardwood Dark Brown Mulch or Pine Straw Mulch up to twice per year during the months of April and October. In doing so, Contractor shall ensure that all mulched areas are brought to a minimum depth of three (3) inches **after compaction**. Match mulch to what is currently present in landscape beds or tree rings.

Contractor is responsible for all necessary clean up related to this procedure.

Contractor agrees to provide reasonably neat and defined lines along edges of all mulched areas. This is done to facilitate mechanical edging of these areas. Additionally, Contractor shall properly trench all bed lines adjacent to concrete surfaces. Trenches shall be 3" deep and beveled. Mulched beds on slopes adjacent to turf shall also be trenched to a depth of 3" & beveled to reduce mulch washout. Mulch shall not be piled around tree trunks or bases of plants. Any mulch "volcanoes" around tree trunks shall be corrected immediately at no additional cost to Owner. Labor for trenching shall be included in the unit cost of the mulch.

Contractor agrees to ensure that mulch caught in plant material will be shaken or blown from plants, so that upon completion there is no plant material left covered with mulch.

If, after installation is complete and it is determined that additional mulch is required to attain the required 3" depth, sufficient mulch shall be supplied by Contractor at no additional cost to District.

This item will not be included in the contract amount and shall be invoiced separately the month after service is rendered. Contractor shall provide a price per cubic yard/bale and estimated quantities to be installed per top dressing (based on his own field measurements) and shall submit with bid.

The CDD reserves the right to subcontract out any and all mulching events.

Pricing – Pine Bark Mulch:

PART 4

Based on quantities determined by Contractor's field measurements at time of bidding, Contractor shall install:

275 _____ CY Medium Pine Bark Mulch per specs for the first top-dressing at \$ **65.00** _____ /CY
(app. October) \$ **17,875.00** /installation

And

275 _____ CY Medium Pine Bark Mulch per specs for the second top-dressing at \$ **65.00** _____ /CY
(app. April) \$ **17,875.00** _____ /installation

Installation of Pine Bark Mulch (medium) (All labor and materials) \$ **35,750.00** _____ /yr.
(if both topdressings are performed - do not include in Grand Total)

Additionally, based on quantities determined by Contractor's field measurements at time of bidding, Contractor shall install:

275 _____ CY Shredded Hardwood Dark Brown Mulch at \$ **65.00** _____ / CY
(app. October) \$ **17,875.00** /installation

And

275 _____ CY Shredded Hardwood Dark Brown Mulch at \$ **65.00** _____ / CY
(app. April) \$ **17,875.00** /installation

Pricing – Pine Straw:

Additionally, based on quantities determined by Contractor's field measurements at time of bidding, Contractor shall install:

1600 _____ Bales Pine Straw Mulch per specs for the first top-dressing at \$ **10.00** _____ /bale
(app. October) \$ **16,000.00** installation

And

1600 _____ Bales Pine Straw Mulch per specs for the second top-dressing at \$ **10.00** _____ /bale
(app. April) \$ **16,000.00** /installation

Installation of Pine Straw Mulch (All labor and materials) \$ **32,000.00** _____ /yr.
(if both topdressings are performed - do not include in Grand Total)

Each top-dressing shall leave all beds with a depth of 3"

Total Billing:

Pine Bark: \$17, 875.00 + Pine Straw: \$16,000.00 = **\$33,875.00**

Authorized Signature to Proceed

_____/_____/_____
Date of Authorization

Proposal submitted by Robert Johnson, Account Manager
rjohnson@redtreelandscape.systems / Cell phone: (727)-599-3306



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5532 Auld Lane, Holiday FL 34690

REVISED SOUTH ROW OF BUD BEXLEY PARKWAY

CLEAN-UP OF OVERGROWN FIELD AREAS PROPOSAL for BEXLEY CDD

Attention: Lisa Castoria, District Manager

November 19, 2025

Scope of Work:

Initial clean-up of overgrown field areas, south ROW of Bud Bexley Parkway, north of Ballantrae, on both sides of Ballantrae, as indicated on the map below. (Does not include the south side of Bud Bexley East of Ballantrae Blvd.).



Total Cost: \$2,500.00

Authorized Signature to Proceed

Date of Authorization

Proposal submitted by John Burkett - Client Care Specialist jburkett@redtreelandscape.com / Cell phone: (727) 267-2059



The New Standard in Landscape Maintenance

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5532 Auld Lane, Holiday FL 34690

REVISED SOUTH ROW OF BUD BEXLEY PARKWAY

MAINTENANCE OF FIELD AREAS PROPOSAL for BEXLEY CDD

Attention: Lisa Castoria, District Manager

November 19, 2025

Scope of Work:

Monthly maintenance of field areas, south ROW of Bud Bexley Parkway, north of Ballantrae, on both sides of Ballantrae, as indicated on the map below. (Does not include the south side of Bud Bexley East of Ballantrae Blvd.).



Total Cost: \$1,200.00 per month

Authorized Signature to Proceed

Date of Authorization

Proposal submitted by John Burkett - Client Care Specialist jburkett@redtreelandscape.com / Cell phone: (727) 267-2059



The New Standard in Landscape Maintenance

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5532 Auld Lane, Holiday FL 34690

December 10, 2025

Landscape Enhancement Proposal

For

Bexley CDD

Attention: John Toborg- Division Manager
jtoborg@rizzetta.com

Target Area:

- Lotus Lawn

Scope of Work:

- Install (210) 3-gallon Confederate Jasmine.
- Install (3) yards of Pine Fines.
- Labor, materials, debris disposal, hauling, and dumping fees included.

Total: \$6,105.00

Authorized By:

Date:

Proposal submitted by Kevin Smith – Senior Landscape Designer / Advisor
ksmith@redtreelandscape.com / Cell phone: (727) 426.3679



The New Standard in Landscape Maintenance

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5532 Auld Lane, Holiday FL 34690

December 10, 2025

Landscape Enhancement Proposal

For

Bexley CDD

Attention: John Toborg- Division Manager
jtoborg@rizzetta.com

Target Area:

- Candence Loop

Scope of Work:

- Install (140) 3-gallon Confederate Jasmine.
- Install (1) yard of Pine Fines.
- Labor, materials, debris disposal, hauling, and dumping fees included.

Total: \$3,995.00

Authorized By:

Date:

Proposal submitted by Kevin Smith – Senior Landscape Designer / Advisor
ksmith@redtreelandscape.com / Cell phone: (727) 426.3679



The New Standard in Landscape Maintenance

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5532 Auld Lane, Holiday FL 34690

December 10, 2025

Red Maple Tree Removal Proposal

For

Bexley CDD

Attention: John Toborg- Division Manager
jtoborg@rizzetta.com

- Remove a dead Red Maple tree on the BVD median between Solace Run and Balance Cove.
- Install a 3" caliper Sweet Gum tree.
- Install a Gator Bag with the flood bubbler inserted through the top, allowing the bag to fill with water during every irrigation schedule. The Gator Bag must be placed inside an 8"-10" earthen water saucer surrounding the root ball.
- Labor, materials, debris disposal, hauling, and dumping fees included.

Total: \$1,525.00

Authorized By:

Date:

Proposal submitted by Kevin Smith – Senior Landscape Designer / Advisor
ksmith@redtreelandscape.com / Cell phone: (727) 426.3679



The New Standard in Landscape Maintenance

1.888.RED.TREE

www.redtreelandscape.com

5532 Auld Lane, Holiday FL 34690

December 10, 2025

Weeping Willow Tree Proposal

For

Bexley CDD

Attention: John Toborg- Division Manager
jtoborg@rizzetta.com

- Remove a dead Weeping Willow tree on the pond bank between Bud Bexley Parkway (BBP and BVD).
- Install a 45-gallon Bald Cypress tree.
- Install a Gator Bag with the flood bubbler inserted through the top, allowing the bag to fill with water during every irrigation schedule. The Gator Bag must be placed inside an 8"-10" earthen water saucer surrounding the root ball.
- Labor, materials, debris disposal, hauling, and dumping fees included.

Total: \$1,650.00

Authorized By:

Date:

Proposal submitted by Kevin Smith – Senior Landscape Designer / Advisor
ksmith@redtreelandscape.com / Cell phone: (727) 426.3679

Tab 7



October 27, 2025

Bexley CDD
c/o Rizzetta and Company
5844 Old Pasco Rd, Suite 100
Wesley Chapel, FL 33544

RE: Full Service Reserve Study with Site Inspection
Bexley CDD
16950 Vibrant Way
Land O Lakes, FL 34638

Dear Board of Supervisors:

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

Bexley CDD commenced operations in 5/2015. The community started home construction soon after and construction has been gradual up to current times. The community is comprised of single family homes and townhomes. The CDD consists of 938.717 acres and is located in Land O Lakes, Pasco County, Florida. After a review of plats, aerials, and county records, we recommend the following reserve items be included in the report:

- **Stormwater Drainage**
- **Retention Ponds**
- **Entry Monuments**
- **Alleys**
- **CDD-Owned Sidewalks**
- **Pavilions**
- **Fencing**
- **Trail**
- **Parks**
- **Mail Pavilions**
- **Dog Parks**
- **Any Other Items Specified by You**

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



Scope of Service

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

- Site inspection of common areas and improvements with both a Certified General Contractor and a CAI-designated Reserve Specialist (Both are degreed engineers).
- Our user-friendly reserve study report that includes narrative, photographs, pooled method cash flow plan, component method plan (if applicable), reserve item component cost, remaining life, and useful life inventory. The report projects costs and funding for 30 years using localized costs.
- Percent Funded Analysis. This compares what you have in reserve funds to what the ideal amount should be, something many reserve studies do not include.
- One site meeting with management or the board on the day of inspection, if requested.
- Electronic copies of the report. Electronic copies can also be requested any time in the future by email. A hard copy is available free of charge upon request.
- Revisions or amendments of reports for up to 90 days from the first submission of the report. We welcome all feedback. (It is not uncommon for there to be one or two refinements of the report to meet your specific requirements).
- Accessibility. Call, write, or email us any time and you will receive prompt follow-up. We aim to exceed expectations and consider customer service our top priority.
- 30 year cash flow plan in the report.
- Review of plats, drawings, and site aerials.



Qualifications

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

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

A partial list of our clients include:

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



Experience

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

Fishhawk CDD I, CDD II, CDD III, & CDD IV, Lithia, Florida

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

Heritage Harbour South CDD, Bradenton, Florida

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

Venetian CDD, Venice, FL

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

Riverwood CDD, Port Charlotte, FL

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

Two Creeks CDD, Middleburg, FL

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



Services

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

Full Reserve Study with Site Inspection (Level-1) \$4,800

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

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

Sincerely,

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

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

Accepted by Signature:

Date

Accepted by Printed Name: _____



Long-term thinking. Everyday commitment.

Matt Kuisle, Regional Executive Director

(813) 536-7201

matt@reserveadvisors.com

Property Wellness Reserve Study Program Proposal Level I Reserve Study

Bexley Community Development District
Land O' Lakes, Florida



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 turn to Reserve Advisors. As your property wellness consultants, our reserve study helps associations 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.



Threshold Funding Strategy

The most stable and equitable approach to funding reserves, this strategy aggregates all future expenditures and calculates annual reserve contributions such that the reserve balance never falls below a minimum threshold.

Helping Communities Thrive for Over 30 Years

With a team of 60+ engineers whose engineering backgrounds include civil, structural, mechanical, and more, we have over 350 years of combined experience conducting reserve studies for common interest realty associations nationwide. Our service area is one of the largest in the industry, and we pride ourselves on delivering unbiased recommendations that give communities the plans they need to ensure the future well-being of the property.

37,000+
RESERVE STUDIES CONDUCTED

19,000+
ASSOCIATIONS SERVED

3,950,000+
RESIDENTS SERVED

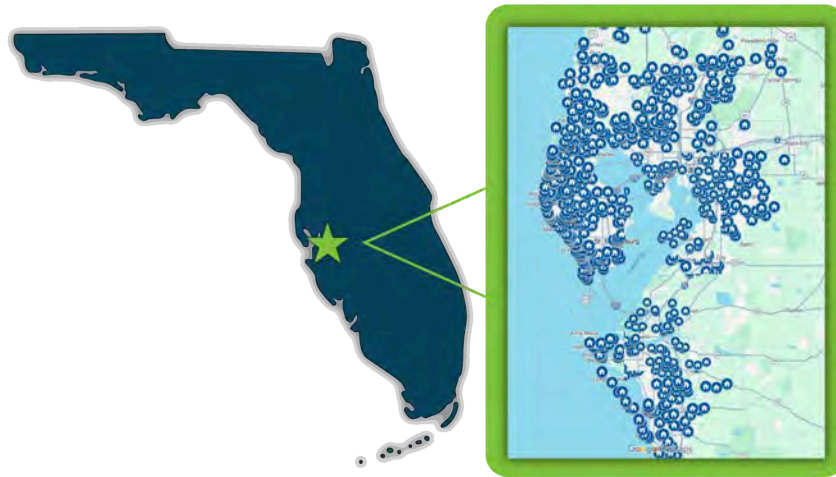
Industry Leadership

We were instrumental in pioneering the Community Association Institute's (CAI) Reserve Study Standards, and were influential in revising these standards in 2023 through our participation in an industry task force. This diverse group included reserve specialists, professional managers, community board members, attorneys, and accountants. Additionally, we continue to shape best practices in the field through active involvement with the Foundation for Community Association Research (FCAR), including chairing the Reserve Study Best Practices Report.

As a national member of CAI, we are actively involved in over 30 chapters nationwide, regularly supporting the organization's members through structured education, speaking engagements, and publications for managers and board members. Our leadership team members, Michelle Baldry and Matt Kuisle, are board members of FCAR and CAI, respectively. In addition to complying with legislative requirements specific to reserve studies, we are compliant with and/or accredited by:

- Association of Professional Reserve Analysts (APRA)
- Community Associations Institute (CAI)
- American Institute of Certified Public Accountants (AICPA)

Your Trusted Neighborhood Partner



Hear What Our Clients Say



"Tamara is very communicative and easy to talk to. She always answers my questions and continues to take my calls. She showed authentic empathy for our homeowners and worked with us to adjust the report due to the upcoming work we have going on at my property. Based on my experience with her alone, I would recommend Reserve Advisors."



Keanna Moss, General Manager
Ventana Condominium Association, Inc.
Tampa, Florida



"This is our second reserve study (update) with Reserve Advisors. They are professional and very thorough. They helped the Association get on track with reserves and to develop a plan that covers the state mandated SIRS with realistic costs. We plan to continue to use them in future studies."

Lisa Duritsch, Board President
The Beacon on 3rd Street Condominium Association, Inc.
St. Petersburg, Florida

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	
ON-SITE 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

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

Bexley Community Development District comprises 1,644 homes. We've identified and will include the following reserve components:

- ~72 ponds
- Wetlands
- Landscaping
- Irrigation
- Sidewalks
- Alleys
- Dog park
- Fences
- Utility vehicle
- Mailbox kiosks
- Signage

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

Key Elements of Your Property Wellness Reserve Study Program

Reserve Advisors' Exclusive Tools

Reserve Advisors' exclusive tools allow you to make informed decisions to maintain your association'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.

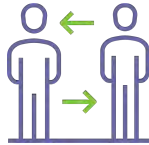
For Confidence in All Decisions



Personalized Experience Guarantee

As your trusted advisor, we are committed to providing clarity on the true cost of property ownership through a comprehensive capital planning 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 we're the right partner to protect it.**



Full Engagement

It's our job to understand your specific concerns and to discuss your priorities in order to ensure your 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.



RA is comprised of a highly professional team with the depth of knowledge, access to extensive research resources, and sensitive interpersonal skills needed to collaborate with our community group comprised of board members and ad-hoc committee members to produce a detailed and relevant reserve study vital to keeping our community in a strong fiscal position as we plan for the future. Our engineer did an excellent job preparing the community for the site visit, listening to and incorporating information shared by our stakeholders, and leading them through a virtual meeting review of the completed study, answering questions and noting tweaks needed to finalize the reserve study for the community.

Ellen C. | Treasurer



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

To Start Your Property Wellness Reserve Study Program Today:

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

Service	Price
Reserve Study (Level I)	\$8,550.00
Your Reserve Study Includes: <ul style="list-style-type: none"> • Pre-project Collaboration: Meeting with management and the board on community priorities and goals. • Unlimited Virtual Support: Free Study Presentation after report delivery. Available for the lifetime of your community. • Excel Financial Management Tool: Fully editable spreadsheet to run scenarios & track actual expenditures. • Preventative Maintenance Guidance: Clear maintenance schedules and practical steps your team can implement right away. • Revision Period: One complimentary update within 6 months of delivery. • Dedicated Expertise: Your community is supported by a full-time Reserve Advisors engineer, backed by our quality assurance team to ensure accuracy and peace of mind. 	
Optional Items - Check to Authorize	
<p>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.</p>	

Total **\$8,550.00**

2. Sign below

Signature: _____

Title: _____

Name: _____

Date: _____

For: Bexley Community Development District

Ref: 254081

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 10/29/2025, 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, LLC ("RA") 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. The purpose of our Milestone Phase I is to evaluate the structural integrity of the building on the subject property and provide an inspection report summarizing our findings related to structural issues, or lack thereof. The purpose of our Insurance Appraisal is to identify the reconstruction cost value to ensure appropriate property insurance coverage.

In each case, 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. Our Milestone Phase I inspections are limited to a visual examination of habitable and uninhabitable areas of the building, including the primary structural members and systems. The inspection aims to determine the presence of substantial structural deterioration, and unsafe or dangerous conditions with the structure. The reserve report, Milestone Phase I 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 subject 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 any invasive testing whatsoever (including, without limitation, 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 may contain 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 or Milestone Phase I, as applicable, 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 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 and Your Name - 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 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 - The retainer payment for any reserve study, Milestone Phase I inspection, and/or combined services 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. We reserve the right to limit or decline refunds in our sole discretion. Refunds vary based on the applicable facts and circumstances.

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.

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

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

Traditional Reserve Study Proposal
Bexley Community Development District
November 4, 2025

Proposal Number: 25.11.04.456

20+ Years Combined Experience	7,901 Components Evaluated	\$2,193,019,666 Funding Guidance Provided
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An aerial photograph of a residential street intersection. The central focus is a circular tree pit containing a single green tree. The surrounding area includes a paved road, sidewalks, and landscaped greenery with various trees and shrubs. In the upper left, a house with a red roof and a swimming pool is visible. The overall scene is well-maintained and suburban in style.

Thank You.

THANK YOU FOR YOUR TRUST

November 4, 2025

Bexley Community Development District
C/O Lisa Castoria, District Manager
Rizzetta & Company
16950 Vibrant Way
Land O' Lakes, FL 34638

Dear Ms. Castoria:

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

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

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

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

Sound fair and reasonable?

Sincerely,



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



EXECUTIVE SUMMARY

Introduction

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

Objective

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

Methodology

A reserve study may include:

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

A reserve study does not include:

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

Findings

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

Recommendations

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

Fee For Service

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

When Needed.



EXECUTIVE AND SENIOR PROFESSIONALS



GLENN M. TYNDALL JR., CPA
Founder & CEO



MICHAEL H. RUSS JR.
Senior Reserve Study Analyst

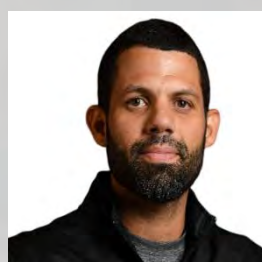
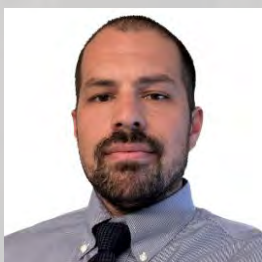
Founder: Glenn Tyndall, Jr., CPA
B.B.A, University of North Florida

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

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

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

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



How We Help You.



TODAY'S HIGHLIGHTS

- Brief Introduction
- Financial Strategy
- Principles on Building Wealth
- Spending Habits of Millennials
- Practical Steps to Retire Early
- Setting Money
- Maximizing the Investment
- Final Words

Discussion Outline

BASED ON A SURVEY

55.00%

Of millennials do not have a savings account and do not have a 401(k)

Presented by [Name]

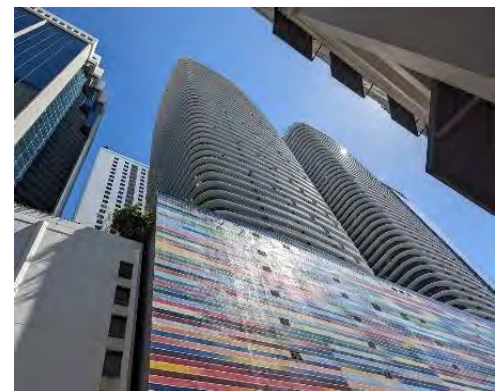
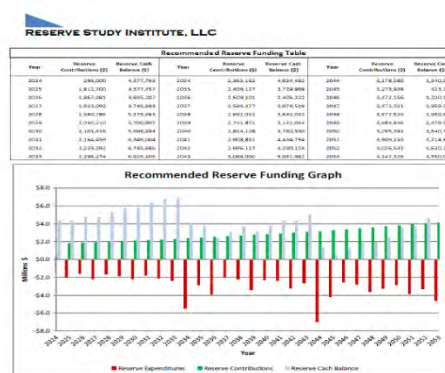
85.00%

Discussion Outline

- Introduction
- Financial Strategy
- Principles on Building Wealth
- Spending Habits of Millennials
- Practical Steps to Retire Early
- Setting Money
- Maximizing the Investment
- Final Words

HOW DOES OUR COMPANY HELP YOU

- 1 **Comprehensive Expertise:** Benefit from our comprehensive expertise, including a CPA on staff for financial insight and field analysts with backgrounds in the construction or related industries. The firm is a member of the Association of Professional Reserve Analysts (APRA).
- 2 **Conservative Estimates:** Rely on our commitment to providing conservative estimates, ensuring a productive approach to financial planning for your community association.
- 3 **Specialist Recommendations:** When our field analysts reach their professional limits, we transparently recommend you contact third-party specialists to help ensure the most accurate and reliable results.
- 4 **Client-Centric Approach:** Experience a client-centric approach where your feedback matters; we actively engage with clients, updating studies based on their input to ensure relevancy and accuracy.
- 5 **Clear Communication:** Enjoy clear and consistent communication throughout the process, ensuring you are informed and confident in every step of the reserve study.
- 6 **Reader-Friendly Reports:** Receive reader-friendly reports that stand out for their clarity and accessibility, avoiding the common pitfalls of overly complex documents from other reserve study companies.
- 7 **Responsive Updates:** We prioritize timely updates, responding to client needs, and making necessary changes to keep your reserve study current and actionable.



See Our Experience.



THE COMPONENT'S WE'VE EVALUATED

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

**7,901
Components Evaluated**

**By Our Professionals
for Our Clients**

Homeowners' Associations

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



Condominiums and Townhomes

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



High-Rise Towers

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



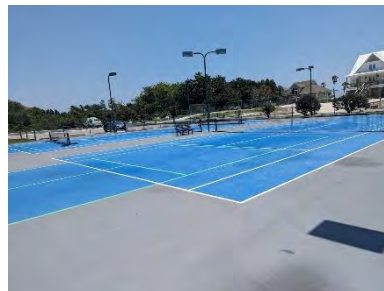
General Site Elements

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



Recreational Elements

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



Mechanical Elements

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



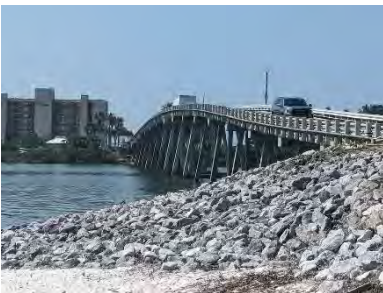
Waterfront Elements

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

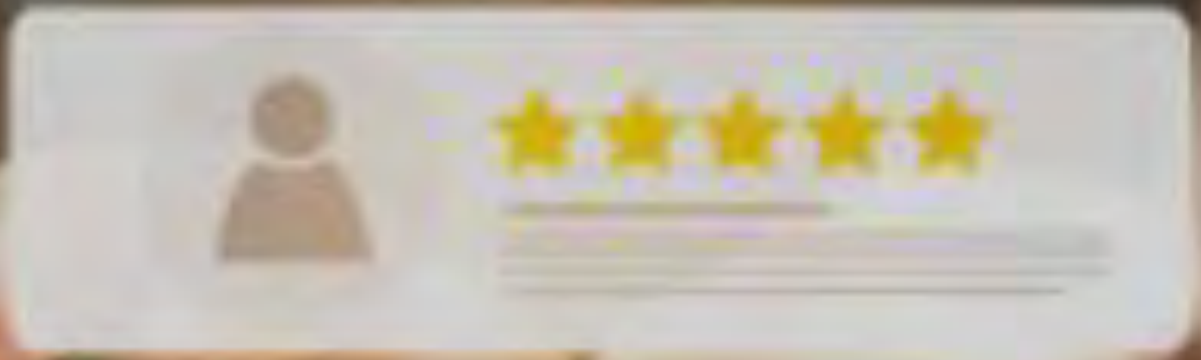


Specialty Elements

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



Our Clients Talk.



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

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

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

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

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

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

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

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

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

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

"That was quick!"

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

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

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

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

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

"Your firm turned around our study so quick."

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

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

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

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

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

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

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

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

Ms. Karen Preston, LCAM
Sunrise Management, Inc.

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

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

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

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

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

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

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

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

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

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

"Thanks for your excellent work."

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

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

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

FREQUENTLY ASKED QUESTIONS (FAQs)

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

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

Q: How long until we receive a report?

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

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

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

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

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

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

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

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

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

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

Q: Can we reserve for repairs for certain items?

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

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

The Agreement.



AGREEMENT

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

SCOPE OF SERVICES

Our Responsibilities

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

Levels of Service

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

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

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

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

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

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

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

Services Available

Traditional Reserve Study

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

Reporting Method

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

Your Responsibility

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

Assumptions and Indemnification

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

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

Report

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

Retention and Propriety of Work Papers

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

Restricted Use of Our Report

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

Client Confidentiality

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

Software Development Disclaimer

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

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

PROPOSED TIMELINE

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

We intend to have our Draft Report to you for review and approval on or around **January 30, 2026**. All documentation requested will need to be provided by the Association's representative to us at least sixty (60) days prior to the date we anticipate having the Draft Report to you. If an onsite visit is necessary, then we require the onsite visit at least sixty (60) days before the date we anticipate having the Draft Report to you. You will be given a period of thirty (30) days from the date of receipt of the initial report to review and provide any edits, comments, or issues to us. In the absence of any response, edits, or issues raised, the report shall be deemed accepted as presented and we reserve the right to issue a final signed copy of the report. All edits, comments, or issues pertaining to the report must be presented in writing in a single email within the specified thirty (30) day review period. We shall not be obligated to consider or address edits submitted in a piecemeal fashion or through multiple, separate communications. This clause ensures that all edits are presented in an organized manner and helps us efficiently process these edits.

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

Multiple Reports Needed

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

Not Engineers or Architects

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

FEES AND BILLING

Billing and Fee for Services and Conditions

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

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

SUMMARY

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

Respectfully Submitted,



Reserve Study Institute, LLC
Jacksonville, Florida



RESERVE STUDY INSTITUTE, LLC

Acceptance of Proposal

Please select one box below to indicate the service selected:

<i>Fee Schedule for Service Level</i>			
Service Includes	Traditional Reserve Study		
	Level 1	Level 2	Level 3
Full Reserve Study	✓		
Establish Reserve Quantities	✓		
Establish Component List	✓		
Site Visit	✓	✓	
Condition Assessment	✓	✓	
Photo Inventory	✓	✓	
Component Inventory	✓	✓	✓
Life & Value Estimates	✓	✓	✓
Reserve Funding Plan	✓	✓	✓
When Payment Due	Fee for Service		
Retainer Prior to Start	N/A	N/A	N/A
Due Upon Draft Report	\$ 17,250	N/A	N/A
Total Fee For Service	\$ 17,250	N/A	N/A
Select One to Select Service	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

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

ASSOCIATION REPRESENTATIVE:

Name

Date

Signature

Title

Only When Ready.



Tab 8

RESOLUTION 2025-___

A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE BEXLEY COMMUNITY DEVELOPMENT DISTRICT RESCINDING THE EXISTING PROHIBITION ON FISHING AND ADOPTING A REVISED FISHING POLICY; PROVIDING FOR SEVERABILITY; PROVIDING FOR AN EFFECTIVE DATE.

SECTION 1. Rescission of Prior Rule.

The portion of the District's Amenity & Use Rules prohibiting all fishing within District lakes and ponds is hereby rescinded in full.

SECTION 2. Adoption of Revised Fishing Policy.

The Board hereby adopts the following Fishing Policy, which shall be incorporated into the District's Amenity & Use Rules:

BEXLEY CDD – FISHING POLICY

1. Authorized Fishing Areas

Fishing is permitted only from District-owned common-area shoreline areas accessible from public trails, sidewalks, or open space. Fishing is not permitted behind private residential lots unless the homeowner has granted explicit permission.

2. Prohibited Fishing Areas

- (a) Any location requiring entry onto private property without permission.
- (b) Any shoreline behind a private lot without explicit homeowner permission.
- (c) All conservation areas and wetland buffers.
- (d) All stormwater structures including aerators, pipes, inflows/outflows, weirs, rip-rap, and control structures.
- (e) Any lake or pond shoreline not accessible via District common area.

3. Methods and Equipment

- Rod and reel only.
- Catch-and-release only.
- No nets, cast nets, traps, or spears.
- No boats, kayaks, canoes, paddleboards, or flotation devices.
- No wading or swimming.

- No feeding or disturbing wildlife.

4. Waste and Equipment Disposal

All persons fishing must remove and properly dispose of all fishing line, hooks, bait containers, and any related materials. No waste or equipment may be left in District ponds or common areas.

5. Authorized Users

Fishing is limited to Bexley residents and accompanied guests. Proof of residency may be required.

6. Hours of Operation

Fishing is permitted from dawn to dusk unless otherwise posted.

7. Licensing Requirements

All persons must comply with Florida freshwater fishing license laws.

8. Enforcement

District staff or security may require violators to leave the area. Repeat violations may result in suspension of amenity privileges. Unauthorized fishing behind residential lots may constitute trespassing.

SECTION 3. Severability.

If any provision of this Resolution is held invalid, the remainder shall not be affected.

SECTION 4. Effective Date.

This Resolution shall take effect immediately upon adoption.

Tab 9

MINUTES OF MEETING

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

BEXLEY
COMMUNITY DEVELOPMENT DISTRICT

The regular meeting of the Board of Supervisors of Bexley Community Development District to be held on **Wednesday, November 19, 2025, at 1:00 p.m.** at the Bexley Clubhouse, 16950 Vibrant Way, Land O Lakes, FL 34638.

Present were:

Joe Albert	Board Supervisor, Chair
Adam Saunders	Board Supervisor, Assistant Secretary
Nancy Pettit	Board Supervisor, Assistant Secretary (<i>via phone</i>)
Stephen Babon	Board Supervisor, Vice Chairman
Deneen Klenke	Board Supervisor, Assistant Secretary

Also present were:

Lisa Castoria	District Manager, Rizzetta & Co.
Alyssa Wilson	District Counsel, Kutak Rock (<i>via phone</i>)
Stephen Brletic	BDI Engineering (<i>arrived 2:21 p.m.</i>)
Pete Lucadano	RedTree Landscape
Robert Johnson	RedTree Landscape
Jacob Adams	Advanced Aquatics
John Toborg	Landscape Inspection Services, Rizzetta & Co.
Jessica Rosa-Melendez	Clubhouse General Manager
Audience	Present

FIRST ORDER OF BUSINESS

Call to Order

Ms. Castoria called the meeting to order at 1:01 p.m. and confirmed that a quorum was present.

SECOND ORDER OF BUSINESS

Audience Comments

There were audience comments regarding exposed drip lines and Pasco water concerns.

RedTree representatives will determine areas where mulch is no longer necessary.

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THIRD ORDER OF BUSINESS

Staff Reports

A. Aquatics Report

Mr. Adams presented the waterway and wetland reports.

The Board discussed a fallen tree and requested a proposal to have it removed.

- Discussion of French Drain/Pond Concerns

Advanced Aquatics and District Engineer will inspect and create a report of the areas of draining and causing damage to CDD areas. This will be presented at the January/February meetings. Any actions to rectify with residents will be determined following the report. Ms. Rosa-Melendez will send an Eblast to residents concerning discharging water.

B. Landscape Inspection Report

Mr. Toborg provided the landscape inspection report to the Board.

There was a brief discussion about debris on Bexley Farm property. Ms. Rosa-Melendez will contact code enforcement.

It was noted that the water truck is in use and that the CDD will be billed for electric meter use. RedTree recommended installation of a well.

RedTree presented a proposal under separate cover for overseeding the soccer field, in the amount of \$6,093. Mr. Lucadano informed the Board that the field would be closed for three weeks once the overseeding has been applied. Ms. Rosa-Melendez will send an eblast to the community informing them of field closure.

On a motion from Ms. Klenke, seconded by Mr. Babon, the Board unanimously approved the RedTree Overseeding Proposal in the amount of \$6,093, for the Bexley Community Development District.

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C. District Engineer

Mr. Brletic presented his report to the Board. There was a follow up discussion on road repairs. Mr. Brletic has a call with Pasco County Public Works regarding central permitting issues. As of 11/11, public works has acknowledged the request but has not provided any feedback. Mr. Brletic will continue to follow up.

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D. District Counsel

i. Discussion on Status of Juniper Items

Ms. Wilson informed the Board that she has had no response from Juniper’s counsel. It was noted that the Board does not want to replace any sod until this is resolved.

ii. Discussion on Parcel Maintenance

Mr. Albert made a call to Pasco County to discuss Parcel Maintenance. He was told that Pasco County will not maintain this area and the District is responsible. He will share the MPUD with Counsel and she will continue researching this item.

Ms. Wilson presented a document from Gray Robinson PA regarding “slated acquisition of CDD property.” There was a brief discussion but no action was taken at this time.

E. General Manager

Ms. Rosa-Melendez presented her report to the Board.

F. District Manager

Ms. Castoria reminded the Board that the next meeting is scheduled for December 17, 2025, at 1:00 p.m. at the clubhouse. It was noted that Ms. Pettit will not be in attendance for this meeting.

Ms. Cantoria reviewed the 3rd quarter website audit report with the Board and informed them that they passed on all areas of the report.

There was a brief discussion on Stantec mitigation. The Board requested that Stantec attend a future meeting to further discuss.

FOURTH ORDER OF BUSINESS

**Consideration of Resolution 2026-02;
Removing and Re-Designing
Assistant Secretary**

This resolution will remove Lynn Hayes as Assistant Secretary and designate Lisa Castoria.

On a Motion by Ms. Klenke, seconded by Mr. Albert, with all in favor, the Board of Supervisors adopted Resolution 2026-02; Removing and Re-Designating Assistant Secretary , for the Bexley Community Development District.

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FIFTH ORDER OF BUSINESS **Consideration of Resolution 2026-03;
General Elections**

The Board requested that the election process be drafted by District Counsel and shared via eblast.

On a Motion by Ms. Klenke, seconded by Mr. Saunders, with all in favor, the Board of Supervisors adopted Resolution 2026-03; General Elections, for the Bexley Community Development District.

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SIXTH ORDER OF BUSINESS **Consideration of Reserve Study
Proposals**

The Board reviewed three proposals for FY 25-26 Reserve Study. This item has been tabled to the December 17, 2025 meeting.

SEVENTH ORDER OF BUSINESS **Consideration of McDermit Audit
Engagement Letter**

On a Motion by Mr. Albert, seconded by Mr. Babon, with all in favor, the Board of Supervisors approved the McDermit Audit Engagement Letter, for the Bexley Community Development District.

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EIGHTH ORDER OF BUSINESS **Update on Mus Sweat & Gears Park
Enhancement Survey**

Mr. Saunders shared a draft of the survey with the Board. They requested an eblast be sent to the residents after Thanksgiving.

On a Motion by Mr. Albert, seconded by Mr. Saunder, with all in favor, the Board of Supervisors approved the request to eblast a draft copy of the survey to residents, for the Bexley Community Development District.

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NINTH ORDER OF BUSINESS **Discussion on Resident
Communication Methods**

This item was tabled to the December 17, 2025 meeting.

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TENTH ORDER OF BUSINESS **Discussion of Rangeland Expansion**

There were no updates. This item has been tabled to the January 28, 2025 meeting.

184 **ELEVENTH ORDER OF BUSINESS** **Consideration of Minutes of the Board**
185 **Of Supervisors Regular Meeting**
186 **held on October 22, 2025**
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188 The Board noted that Line 32 has the incorrect spelling of Ms. Rosa-Melendez's
189 name.
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On a motion from Mr. Albert, seconded by Mr. Saunders, the Board of Supervisors approved the October 22, 2025 Board of Supervisor Meeting Minutes, as amended, for the Bexley Community Development District as amended.

191 **TWELFTH ORDER OF BUSINESS** **Ratification of Operation and**
192 **Maintenance Expenses for October**
193 **2025**
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196 The Board asked Ms. Castoria to inquire with Alex Roark Engineering about the
197 September/October billing.
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On a motion from Ms. Klenke, seconded by Mr. Albert, the Board unanimously ratified the operation and maintenance expenditures for October 2025 (\$132,732.44), for the Bexley Community Development District.

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200 **THIRTEENTH ORDER OF BUSINESS** **Supervisor Requests**
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202 Mr. Albert & Mr. Saunders both requested access to the Share Drive for District
203 Documents relating to Bexley CDD.
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205 **FOURTEENTH ORDER OF BUSINESS** **Adjournment**
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On a motion from Mr. Albert, seconded by Mr. Saunders, the Board adjourned the meeting at 4:04 p.m., for the Bexley Community Development District.

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Secretary / Assistant Secretary

Chairman / Vice Chairman