



CASCADES AT GROVELAND COMMUNITY DEVELOPMENT DISTRICT

Advanced Meeting Package

Regular Meeting

*Wednesday
April 8, 2026
2:00 p.m.*

*Location:
Magnolia House Sports Pavilion,
100 Falling Acorn Av.,
Groveland, FL 34736*

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

Cascades at Groveland Community Development District

250 International Parkway, Suite 208
Lake Mary, FL 32746
321-263-0132

Board of Supervisors
Cascades at Groveland Community Development District

Dear Board Members:

The Regular Meeting of the Board of Supervisors of the Cascades at Groveland Community Development District is scheduled for **Wednesday, April 8, 2026, at 2:00 p.m.** at the **Magnolia House Sports Pavilion, 100 Falling Acorn Av., Groveland, FL 34736.**

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

Should you have any questions regarding the agenda, please contact me at (321) 263-0132 X-193 or dmcinnes@vestapropertyservices.com . We look forward to seeing you at the meeting.

Sincerely,

David McInnes

David McInnes
District Manager

Cascades at Groveland Community Development District

Meeting Date: Wednesday, April 8, 2026 Call-in Number: +1 (929) 205-6099
Time: 2:00 PM Meeting ID: 705 571 4830#
Location: Magnolia House Sports (Listen Only)
Pavilion, 100 Falling Acorn
Av., Groveland, FL 34736

Agenda

- I. Roll Call**
- II. Officer Appointment**
 - A. Oath of Office – State & District [Exhibit 1](#)
[Pgs. 6-7](#)
 - B. New Supervisor Information Form [Exhibit 2](#)
[Pg. 9](#)
 - C. Form 1 (found on Florida Commission of Ethics Website)
 - D. Review of Sunshine Law & Supervisor Duties [Exhibit 3](#)
[Pgs. 11-47](#)
 - E. Consideration & Adoption of **Resolution 2026-08**, Designating Officers [Exhibit 4](#)
[Pg. 49](#)
- III. Audience Comments – (limited to 3 minutes per individual for agenda items-Supervisors will respond during agenda item presentation)**
- IV. Presentation of Proof of Publication(s)** [Exhibit 5](#)
[Pgs. 51-52](#)
- V. Staff Reports**
 - A. District Engineer
 - B. District Counsel
 - 1. General Election Qualification Period Reminder – June 8, 2026 through June 12, 2026
 - C. District Manager
- VI. Consent Agenda**
 - A. Consideration for Approval – The Minutes of the Board of Supervisors Regular Meeting Held on January 14, 2026 [Exhibit 6](#)
[Pgs. 54-56](#)
 - B. Consideration for Acceptance – The February 2026 Unaudited Financial Statements [Exhibit 7](#)
[Pgs. 58-63](#)
- VII. Business Items**
 - A. Consideration & Adoption of **Resolution 2026-09**, Approving Proposed FY 2026-2027 Budget & Setting Public Hearing [Exhibit 8](#)
[Pgs. 65-72](#)
 - B. Consideration of Contours Landscape Solution – 2026 Landscape Maintenance Services Proposal [Exhibit 9](#)
[Pgs. 74-80](#)

VIII. Discussion Topics

IX. Supervisors' Requests

X. Audience Comments (*limited to 3 minutes per individual for non-agenda items*)

XI. Adjournment

EXHIBIT 1

OATH OF OFFICE

(Art. II, § 5(b), Fla. Const.)

STATE OF FLORIDA

County of _____

I do solemnly swear (or affirm) that I will support, protect, and defend the Constitution and Government of the United States and of the State of Florida; that I am duly qualified to hold office under the Constitution of the State, and that I will well and faithfully perform the duties of

(Full Name of Office – Abbreviations Not Accepted)

on which I am now about to enter, so help me God.

[NOTE: If you affirm, you may omit the words “so help me God.” See § 92.52, Fla. Stat.]

Signature

(Affix Seal Below)

Sworn to and subscribed before me by means of ____ physical presence
Or ____ online notarization this ____ day of _____, 20____.

Signature of Officer Administering Oath or of Notary Public

Print, Type, or Stamp Commissioned Name of Notary Public

Personally Known or Produced Identification

Type of Identification Produced _____

ACCEPTANCE

I accept the office listed in the above Oath of Office.

Mailing Address: Home Office

Street or Post Office Box

Print Name

City, State, Zip Code

Signature

**CASCADES AT GROVELAND
COMMUNITY DEVELOPMENT DISTRICT
BOARD OF SUPERVISORS
OATH OF OFFICE**

I, _____, A CITIZEN OF THE STATE OF FLORIDA AND OF THE UNITED STATES OF AMERICA, AND BEING EMPLOYED BY OR AN OFFICER OF CASCADES AT GROVELAND COMMUNITY DEVELOPMENT DISTRICT AND A RECIPIENT OF PUBLIC FUNDS AS SUCH EMPLOYEE OR OFFICER, DO HEREBY SOLEMNLY SWEAR OR AFFIRM THAT I WILL SUPPORT THE CONSTITUTION OF THE UNITED STATES AND OF THE STATE OF FLORIDA.

Board Supervisor

ACKNOWLEDGMENT OF OATH BEING TAKEN

STATE OF FLORIDA
COUNTY OF _____

The foregoing oath was administered before me this ___ day of _____, 20____, by _____, who personally appeared before me, and is personally known to me or has produced _____ as identification, and is the person described in and who took the aforementioned oath as a Member of the Board of Supervisors of _____ Community Development District and acknowledged to and before me that he/she took said oath for the purposes therein expressed.

(NOTARY SEAL)

Notary Public, State of Florida

Print Name: _____

Commission No.: _____ Expires: _____

EXHIBIT 2

Cascades at Groveland
A Community Development District

NEW SUPERVISOR INFORMATION SHEET

Please return completed forms to
Vesta District Services
Records Management
250 International Parkway, Suite 208
Lake Mary, FL 32746
Phone: 321-263-0132, EXT-193
District Manager: David McInnes

1) Name: _____

2) Address: _____

3) County of Residence _____

4) Phone or Cell _____

5) Email Address _____

6) Waive OR Accept Compensation of Statutorily Allowed \$200 per Meeting
_____. If you have elected to receive compensation
then please forward the attached payroll forms along with the New Supervisor
Information Sheet.

Payroll Information

1) Date of Birth: _____

2) Drivers License Number: _____

EXHIBIT 3

FLORIDA COMMISSION ON ETHICS



GUIDE
to the
SUNSHINE AMENDMENT
and
CODE of ETHICS
for Public Officers and Employees

2025

State of Florida
COMMISSION ON ETHICS

Luis M. Fusté, *Chair*
Coral Gables

Tina Descovich, *Vice Chair*
Indialantic

Paul D. Bain
Tampa

Dr. James Bush, III
Miami

Freddie Figgers
Fort Lauderdale

Laird A. Lile
Naples

Ashley Lukis
Tallahassee

Linda Stewart
Orlando

Kerrie Stillman
Executive Director
P.O. Drawer 15709
Tallahassee, FL 32317-5709
www.ethics.state.fl.us
(850) 488-7864*

*Please direct all requests for information to this number.

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I. HISTORY OF FLORIDA'S ETHICS LAWS

Florida has been a leader among the states in establishing ethics standards for public officials and recognizing the right of citizens to protect the public trust against abuse. Our state Constitution was revised in 1968 to require a code of ethics, prescribed by law, for all state employees and non-judicial officers prohibiting conflict between public duty and private interests.

Florida's first successful constitutional initiative resulted in the adoption of the Sunshine Amendment in 1976, providing additional constitutional guarantees concerning ethics in government. In the area of enforcement, the Sunshine Amendment requires that there be an independent commission (the Commission on Ethics) to investigate complaints concerning breaches of public trust by public officers and employees other than judges.

The Code of Ethics for Public Officers and Employees is found in Chapter 112 (Part III) of the Florida Statutes. Foremost among the goals of the Code is to promote the public interest and maintain the respect of the people for their government. The Code is also intended to ensure that public officials conduct themselves independently and impartially, not using their offices for private gain other than compensation provided by law. While seeking to protect the integrity of government, the Code also seeks to avoid the creation of unnecessary barriers to public service.

Criminal penalties, which initially applied to violations of the Code, were eliminated in 1974 in favor of administrative enforcement. The Legislature created the Commission on Ethics that year "to serve as guardian of the standards of conduct" for public officials, state and local. Five of the Commission's nine members are appointed by the Governor, and two each are appointed by the President of the Senate and Speaker of the House of Representatives. No more than five Commission members may be members of the same political party, and none may be lobbyists, or hold any public employment during their two-year terms of office. A chair is selected from among the members to serve a one-year term and may not succeed himself or herself.

II. ROLE OF THE COMMISSION ON ETHICS

In addition to its constitutional duties regarding the investigation of complaints, the Commission:

- Renders advisory opinions to public officials;
- Prescribes forms for public disclosure;
- Prepares mailing lists of public officials subject to financial disclosure for use in distributing forms and notifying delinquent filers;
- Makes recommendations to disciplinary officials when appropriate for violations of ethics and disclosure laws, since it does not impose penalties;
- Administers the Executive Branch Lobbyist Registration and Reporting Law;
- Maintains financial disclosure filings of constitutional officers and state officers and employees; and,
- Administers automatic fines for public officers and employees who fail to timely file required annual financial disclosure.

III. THE ETHICS LAWS

The ethics laws generally consist of two types of provisions, those prohibiting certain actions or conduct and those requiring that certain disclosures be made to the public. The following descriptions of these laws have been simplified in an effort to provide notice of their requirements. Therefore, we suggest that you also review the wording of the actual law. Citations to the appropriate laws are in brackets.

The laws summarized below apply generally to all public officers and employees, state and local, including members of advisory bodies. The principal exception to this broad coverage is the exclusion of judges, as they fall within the jurisdiction of the Judicial Qualifications Commission.

Public Service Commission (PSC) members and employees, as well as members of the PSC Nominating Council, are subject to additional ethics standards that are enforced by the Commission

on Ethics under Chapter 350, Florida Statutes. Further, members of the governing boards of charter schools are subject to some of the provisions of the Code of Ethics [Sec. 1002.33(26), Fla. Stat.], as are the officers, directors, chief executive officers and some employees of business entities that serve as the chief administrative or executive officer or employee of a political subdivision. [Sec. 112.3136, Fla. Stat.]

A. PROHIBITED ACTIONS OR CONDUCT

1. Solicitation and Acceptance of Gifts

Public officers, employees, local government attorneys, and candidates are prohibited from soliciting or accepting anything of value, such as a gift, loan, reward, promise of future employment, favor, or service, that is based on an understanding that their vote, official action, or judgment would be influenced by such gift. [Sec. 112.313(2), Fla. Stat.]

Persons required to file financial disclosure FORM 1 or FORM 6 (see Part III F of this brochure), and state procurement employees, are prohibited from **soliciting** any gift from a political committee, lobbyist who has lobbied the official or his or her agency within the past 12 months, or the partner, firm, employer, or principal of such a lobbyist or from a vendor doing business with the official's agency. [Sec. 112.3148, Fla. Stat.]

Persons required to file FORM 1 or FORM 6, and state procurement employees are prohibited from directly or indirectly **accepting** a gift worth more than \$100 from such a lobbyist, from a partner, firm, employer, or principal of the lobbyist, or from a political committee or vendor doing business with their agency. [Sec.112.3148, Fla. Stat.]

However, notwithstanding Sec. 112.3148, Fla. Stat., no Executive Branch lobbyist or principal shall make, directly or indirectly, and no Executive Branch agency official who files FORM 1 or FORM 6 shall knowingly accept, directly or indirectly, **any expenditure** made for the purpose of lobbying. [Sec. 112.3215, Fla. Stat.] Typically, this would include gifts valued at less than \$100 that formerly were permitted under Section 112.3148, Fla. Stat. Similar rules apply to members and employees of

the Legislature. However, these laws are not administered by the Commission on Ethics. [Sec. 11.045, Fla. Stat.]

Also, persons required to file Form 1 or Form 6, and state procurement employees and members of their immediate families, are prohibited from accepting any gift from a political committee. [Sec. 112.31485, Fla. Stat.]

2. *Unauthorized Compensation*

Public officers or employees, local government attorneys, and their spouses and minor children are prohibited from accepting any compensation, payment, or thing of value when they know, or with the exercise of reasonable care should know, that it is given to influence a vote or other official action. [Sec. 112.313(4), Fla. Stat.]

3. *Misuse of Public Position*

Public officers and employees, and local government attorneys are prohibited from corruptly using or attempting to use their official positions or the resources thereof to obtain a special privilege or benefit for themselves or others. [Sec. 112.313(6), Fla. Stat.]

4. *Abuse of Public Position*

Public officers and employees are prohibited from abusing their public positions in order to obtain a disproportionate benefit for themselves or certain others. [Article II, Section 8(h), Florida Constitution.]

5. *Disclosure or Use of Certain Information*

Public officers and employees and local government attorneys are prohibited from disclosing or using information not available to the public and obtained by reason of their public position, for the personal benefit of themselves or others. [Sec. 112.313(8), Fla. Stat.]

6. *Solicitation or Acceptance of Honoraria*

Persons required to file financial disclosure FORM 1 or FORM 6 (see Part III F of this brochure), and state procurement employees, are prohibited from **soliciting** honoraria related to their public offices or duties. [Sec. 112.3149, Fla. Stat.]

Persons required to file FORM 1 or FORM 6, and state procurement employees, are prohibited from knowingly **accepting** an honorarium from a political committee, lobbyist who has lobbied the person's agency within the past 12 months, or the partner, firm, employer, or principal of such a lobbyist, or from a vendor doing business with the official's agency. However, they may accept the payment of expenses related to an honorarium event from such individuals or entities, provided that the expenses are disclosed. See Part III F of this brochure. [Sec. 112.3149, Fla. Stat.]

Lobbyists and their partners, firms, employers, and principals, as well as political committees and vendors, are prohibited from **giving** an honorarium to persons required to file FORM 1 or FORM 6 and to state procurement employees. Violations of this law may result in fines of up to \$5,000 and prohibitions against lobbying for up to two years. [Sec. 112.3149, Fla. Stat.]

However, notwithstanding Sec. 112.3149, Fla. Stat., no Executive Branch or legislative lobbyist or principal shall make, directly or indirectly, and no Executive Branch agency official who files FORM 1 or FORM 6 shall knowingly accept, directly or indirectly, **any expenditure** made for the purpose of lobbying. [Sec. 112.3215, Fla. Stat.] This may include honorarium event related expenses that formerly were permitted under Sec. 112.3149, Fla. Stat. Similar rules apply to members and employees of the Legislature. However, these laws are not administered by the Commission on Ethics. [Sec. 11.045, Fla. Stat.]

B. PROHIBITED EMPLOYMENT AND BUSINESS RELATIONSHIPS

1. *Doing Business With One's Agency*

- a) A public employee acting as a purchasing agent, or public officer acting in an official capacity, is prohibited from purchasing, renting, or leasing any realty, goods, or

services for his or her agency from a business entity in which the officer or employee or his or her spouse or child owns more than a 5% interest. [Sec. 112.313(3), Fla. Stat.]

- b) A public officer or employee, acting in a private capacity, also is prohibited from renting, leasing, or selling any realty, goods, or services to his or her own agency if the officer or employee is a state officer or employee, or, if he or she is an officer or employee of a political subdivision, to that subdivision or any of its agencies. [Sec. 112.313(3), Fla. Stat.]

2. *Conflicting Employment or Contractual Relationship*

- a) A public officer or employee is prohibited from holding any employment or contract with any business entity or agency regulated by or doing business with his or her public agency. [Sec. 112.313(7), Fla. Stat.]
- b) A public officer or employee also is prohibited from holding any employment or having a contractual relationship which will pose a frequently recurring conflict between the official's private interests and public duties or which will impede the full and faithful discharge of the official's public duties. [Sec. 112.313(7), Fla. Stat.]
- c) Limited exceptions to this prohibition have been created in the law for legislative bodies, certain special tax districts, drainage districts, and persons whose professions or occupations qualify them to hold their public positions. [Sec. 112.313(7)(a) and (b), Fla. Stat.]

3. *Exemptions*—Pursuant to Sec. 112.313(12), Fla. Stat., the prohibitions against doing business with one's agency and having conflicting employment may not apply:

- a) When the business is rotated among all qualified suppliers in a city or county.
- b) When the business is awarded by sealed, competitive bidding and neither the official nor his or her spouse or child have attempted to persuade agency personnel to enter

the contract. NOTE: Disclosure of the interest of the official, spouse, or child and the nature of the business must be filed prior to or at the time of submission of the bid on Commission FORM 3A with the Commission on Ethics or Supervisor of Elections, depending on whether the official serves at the state or local level.

- c) When the purchase or sale is for legal advertising, utilities service, or for passage on a common carrier.
- d) When an emergency purchase must be made to protect the public health, safety, or welfare.
- e) When the business entity is the only source of supply within the political subdivision and there is full disclosure of the official's interest to the governing body on Commission FORM 4A.
- f) When the aggregate of any such transactions does not exceed \$500 in a calendar year.
- g) When the business transacted is the deposit of agency funds in a bank of which a county, city, or district official is an officer, director, or stockholder, so long as agency records show that the governing body has determined that the member did not favor his or her bank over other qualified banks.
- h) When the prohibitions are waived in the case of ADVISORY BOARD MEMBERS by the appointing person or by a two-thirds vote of the appointing body (after disclosure on Commission FORM 4A).
- i) When the public officer or employee purchases in a private capacity goods or services, at a price and upon terms available to similarly situated members of the general public, from a business entity which is doing business with his or her agency.
- j) When the public officer or employee in a private capacity purchases goods or services from a business entity which is subject to the regulation of his or her agency where the price and terms of the transaction are available to similarly situated members of

the general public and the officer or employee makes full disclosure of the relationship to the agency head or governing body prior to the transaction.

4. *Additional Exemptions*

No elected public officer is in violation of the conflicting employment prohibition when employed by a tax exempt organization contracting with his or her agency so long as the officer is not directly or indirectly compensated as a result of the contract, does not participate in any way in the decision to enter into the contract, abstains from voting on any matter involving the employer, and makes certain disclosures. [Sec. 112.313(15), Fla. Stat.]

5. *Legislators Lobbying State Agencies*

A member of the Legislature is prohibited from representing another person or entity for compensation during his or her term of office before any state agency other than judicial tribunals. [Art. II, Sec. 8(e), Fla. Const., and Sec. 112.313(9), Fla. Stat.]

6. *Additional Lobbying Restrictions for Certain Public Officers and Employees*

A statewide elected officer; a member of the legislature; a county commissioner; a county officer pursuant to Article VIII or county charter; a school board member; a superintendent of schools; an elected municipal officer; an elected special district officer in a special district with ad valorem taxing authority; or a person serving as a secretary, an executive director, or other agency head of a department of the executive branch of state government shall not lobby for compensation on issues of policy, appropriations, or procurement before the federal government, the legislature, any state government body or agency, or any political subdivision of this state, during his or her term of office. [Art. II Sec 8(f)(2), Fla. Const. and Sec. 112.3121, Fla. Stat.]

7. *Employees Holding Office*

A public employee is prohibited from being a member of the governing body which serves as his or her employer. [Sec. 112.313(10), Fla. Stat.]

8. *Professional and Occupational Licensing Board Members*

An officer, director, or administrator of a state, county, or regional professional or occupational organization or association, while holding such position, may not serve as a member of a state examining or licensing board for the profession or occupation. [Sec. 112.313(11), Fla. Stat.]

9. *Contractual Services: Prohibited Employment*

A state employee of the executive or judicial branch who participates in the decision-making process involving a purchase request, who influences the content of any specification or procurement standard, or who renders advice, investigation, or auditing, regarding his or her agency's contract for services, is prohibited from being employed with a person holding such a contract with his or her agency. [Sec. 112.3185(2), Fla. Stat.]

10. *Local Government Attorneys*

Local government attorneys, such as the city attorney or county attorney, and their law firms are prohibited from representing private individuals and entities before the unit of local government which they serve. A local government attorney cannot recommend or otherwise refer to his or her firm legal work involving the local government unit unless the attorney's contract authorizes or mandates the use of that firm. [Sec. 112.313(16), Fla. Stat.]

11. *Dual Public Employment*

Candidates and elected officers are prohibited from accepting public employment if they know or should know it is being offered for the purpose of influence. Further, public employment may not be accepted unless the position was already in existence or was created without the anticipation of the official's interest, was publicly advertised, and the officer had to meet the same qualifications and go through the same hiring process as other applicants. For elected public officers already holding public employment, no promotion given for the purpose of influence may be accepted, nor may promotions that are inconsistent with those given other similarly situated employees. [Sec. 112.3125, Fla. Stat.]

C. RESTRICTIONS ON APPOINTING, EMPLOYING, AND CONTRACTING WITH RELATIVES

1. *Anti-Nepotism Law*

A public official is prohibited from seeking for a relative any appointment, employment, promotion, or advancement in the agency in which he or she is serving or over which the official exercises jurisdiction or control. No person may be appointed, employed, promoted, or advanced in or to a position in an agency if such action has been advocated by a related public official who is serving in or exercising jurisdiction or control over the agency; this includes relatives of members of collegial government bodies. NOTE: This prohibition does not apply to school districts (except as provided in Sec. 1012.23, Fla. Stat.), community colleges and state universities, or to appointments of boards, other than those with land-planning or zoning responsibilities, in municipalities of fewer than 35,000 residents. Also, the approval of budgets does not constitute “jurisdiction or control” for the purposes of this prohibition. This provision does not apply to volunteer emergency medical, firefighting, or police service providers. [Sec. 112.3135, Fla. Stat.]

2. *Additional Restrictions*

A state employee of the executive or judicial branch or the PSC is prohibited from directly or indirectly procuring contractual services for his or her agency from a business entity of which a relative is an officer, partner, director, or proprietor, or in which the employee, or his or her spouse, or children own more than a 5% interest. [Sec. 112.3185(6), Fla. Stat.]

D. POST OFFICE HOLDING AND EMPLOYMENT (REVOLVING DOOR) RESTRICTIONS

1. *Lobbying by Former Legislators, Statewide Elected Officers, and Appointed State Officers*

A member of the Legislature or a statewide elected or appointed state official is prohibited for two years following vacation of office from representing another person or entity for compensation before the government body or agency of which the individual was an officer or member. Former members of the Legislature are also prohibited for two years from lobbying the executive branch. [Art. II, Sec. 8(e), Fla. Const. and Sec. 112.313(9), Fla. Stat.]

2. *Lobbying by Former State Employees*

Certain employees of the executive and legislative branches of state government are prohibited from personally representing another person or entity for compensation before the agency with which they were employed for a period of two years after leaving their positions, unless employed by another agency of state government. [Sec. 112.313(9), Fla. Stat.] These employees include the following:

- a) Executive and legislative branch employees serving in the Senior Management Service and Selected Exempt Service, as well as any person employed by the Department of the Lottery having authority over policy or procurement.
- b) serving in the following position classifications: the Auditor General; the director of the Office of Program Policy Analysis and Government Accountability (OPPAGA); the Sergeant at Arms and Secretary of the Senate; the Sergeant at Arms and Clerk of the House of Representatives; the executive director and deputy executive director of the Commission on Ethics; an executive director, staff director, or deputy staff director of each joint committee, standing committee, or select committee of the Legislature; an executive director, staff director, executive assistant, legislative analyst, or attorney serving in the Office of the President of the Senate, the Office of the Speaker of the House of Representatives, the Senate Majority Party Office, the Senate Minority Party Office, the House Majority Party Office, or the House Minority Party Office; the Chancellor and Vice-Chancellors of the State University System; the general counsel to the Board of Regents; the president, vice presidents, and deans of each state university; any person hired on a contractual basis and having the power normally conferred upon such persons, by whatever title; and any person having the power normally conferred upon the above positions.

This prohibition does not apply to a person who was employed by the Legislature or other agency prior to July 1, 1989; who was a defined employee of the State University System or the Public Service Commission who held such employment on December 31, 1994; or who reached normal retirement age and retired by July 1, 1991. It does apply to OPS employees.

PENALTIES: Persons found in violation of this section are subject to the penalties contained in the Code (see PENALTIES, Part V) as well as a civil penalty in an amount equal to the compensation which the person received for the prohibited conduct. [Sec. 112.313(9)(a)5, Fla. Stat.]

3. *6-Year Lobbying Ban*

For a period of six years after vacation of public position occurring on or after December 31, 2022, a statewide elected officer or member of the legislature shall not lobby for compensation on issues of policy, appropriations, or procurement before the legislature or any state government body or agency. [Art. II Sec 8(f)(3)a., Fla. Const. and Sec. 112.3121, Fla. Stat.]

For a period of six years after vacation of public position occurring on or after December 31, 2022, a person serving as a secretary, an executive director, or other agency head of a department of the executive branch of state government shall not lobby for compensation on issues of policy, appropriations, or procurement before the legislature, the governor, the executive office of the governor, members of the cabinet, a department that is headed by a member of the cabinet, or his or her former department. [Art. II Sec 8(f)(3)b., Fla. Const. and Sec. 112.3121, Fla. Stat.]

For a period of six years after vacation of public position occurring on or after December 31, 2022, a county commissioner, a county officer pursuant to Article VIII or county charter, a school board member, a superintendent of schools, an elected municipal officer, or an elected special district officer in a special district with ad valorem taxing authority shall not lobby for compensation on issues of policy, appropriations, or procurement before his or her former agency or governing body. [Art. II Sec 8(f)(3)c., Fla. Const. and Sec. 112.3121, Fla. Stat.]

4. *Additional Restrictions on Former State Employees*

A former executive or judicial branch employee or PSC employee is prohibited from having employment or a contractual relationship, at any time after retirement or termination of employment, with any business entity (other than a public agency) in connection with a contract in which the employee participated personally and substantially by recommendation or decision while a public employee. [Sec. 112.3185(3), Fla. Stat.]

A former executive or judicial branch employee or PSC employee who has retired or terminated employment is prohibited from having any employment or contractual relationship for two years with any business entity (other than a public agency) in connection with a contract for services which was within his or her responsibility while serving as a state employee. [Sec.112.3185(4), Fla. Stat.]

Unless waived by the agency head, a former executive or judicial branch employee or PSC employee may not be paid more for contractual services provided by him or her to the former agency during the first year after leaving the agency than his or her annual salary before leaving. [Sec. 112.3185(5), Fla. Stat.]

These prohibitions do not apply to PSC employees who were so employed on or before Dec. 31, 1994.

5. *Lobbying by Former Local Government Officers and Employees*

A person elected to county, municipal, school district, or special district office is prohibited from representing another person or entity for compensation before the government body or agency of which he or she was an officer for two years after leaving office. Appointed officers and employees of counties, municipalities, school districts, and special districts may be subject to a similar restriction by local ordinance or resolution. [Sec. 112.313(13) and (14), Fla. Stat.]

E. VOTING CONFLICTS OF INTEREST

State public officers are prohibited from voting in an official capacity on any measure which they know would inure to their own special private gain or loss. A state public officer who abstains, or who votes on a measure which the officer knows would inure to the special private gain or loss of any principal by whom he or she is retained, of the parent organization or subsidiary or sibling of a corporate principal by which he or she is retained, of a relative, or of a business associate, must make every reasonable effort to file a memorandum of voting conflict with the recording secretary in advance of the vote. If that is not possible, it must be filed within 15 days after the vote occurs. The memorandum must disclose the nature of the officer's interest in the matter.

No county, municipal, or other local public officer shall vote in an official capacity upon any measure which would inure to his or her special private gain or loss, or which the officer knows would inure to the special private gain or loss of any principal by whom he or she is retained, of the parent organization or subsidiary or sibling of a corporate principal by which he or she is retained, of a relative, or of a business associate. The officer must publicly announce the nature of his or her interest before the vote and must file a memorandum of voting conflict on Commission Form 8B with the meeting's recording officer within 15 days after the vote occurs disclosing the nature of his or her interest in the matter. However, members of community redevelopment agencies and district officers elected on a one-acre, one-vote basis are not required to abstain when voting in that capacity.

No appointed state or local officer shall participate in any matter which would inure to the officer's special private gain or loss, the special private gain or loss of any principal by whom he or she is retained, of the parent organization or subsidiary or sibling of a corporate principal by which he or she is retained, of a relative, or of a business associate, without first disclosing the nature of his or her interest in the matter. The memorandum of voting conflict (Commission Form 8A or 8B) must be filed with the meeting's recording officer, be provided to the other members of the agency, and be read publicly at the next meeting.

If the conflict is unknown or not disclosed prior to the meeting, the appointed official must orally disclose the conflict at the meeting when the conflict becomes known. Also, a written memorandum of voting conflict must be filed with the meeting's recording officer within 15 days of the disclosure being made and must be provided to the other members of the agency, with the disclosure being read publicly at the next scheduled meeting. [Sec. 112.3143, Fla. Stat.]

F. DISCLOSURES

Conflicts of interest may occur when public officials are in a position to make decisions that affect their personal financial interests. This is why public officers and employees, as well as candidates who run for public office, are required to publicly disclose their financial interests. The disclosure process serves to remind officials of their obligation to put the public interest above personal considerations. It also helps citizens to monitor the considerations of those who spend their tax dollars and participate in public policy decisions or administration.

All public officials and candidates do not file the same degree of disclosure; nor do they all file at the same time or place. Thus, care must be taken to determine which disclosure forms a particular official or candidate is required to file.

The following forms are described below to set forth the requirements of the various disclosures and the steps for correctly providing the information in a timely manner.

1. *FORM 1 - Limited Financial Disclosure*

Who Must File:

Persons required to file FORM 1 include all state officers, local officers, candidates for local elective office, and specified state employees as defined below (other than those officers who are required by law to file FORM 6).

STATE OFFICERS include:

- 1) Elected public officials not serving in a political subdivision of the state and any person appointed to fill a vacancy in such office, unless required to file full disclosure on Form 6.
- 2) Appointed members of each board, commission, authority, or council having statewide jurisdiction, excluding members of solely advisory bodies; but including judicial nominating commission members; directors of Enterprise Florida, Scripps Florida Funding Corporation, and CareerSource Florida, and members of the Council on the Social Status of Black Men and Boys; the Executive Director, governors, and senior managers of Citizens Property Insurance Corporation; governors and senior managers of Florida Workers' Compensation Joint Underwriting Association, board members of the Northeast Florida Regional Transportation Commission, and members of the board of Triumph Gulf Coast, Inc.; members of the board of Florida is

for Veterans, Inc.; and members of the Technology Advisory Council within the Agency for State Technology.

- 3) The Commissioner of Education, members of the State Board of Education, the Board of Governors, local boards of trustees and presidents of state universities, and members of the Florida Prepaid College Board.

LOCAL OFFICERS include:

- 1) Persons elected to office in any political subdivision (such as municipalities, counties, and special districts) and any person appointed to fill a vacancy in such office, unless required to file full disclosure on Form 6.
- 2) Appointed members of the following boards, councils, commissions, authorities, or other bodies of any county, municipality, school district, independent special district, or other political subdivision: the governing body of the subdivision; a community college or junior college district board of trustees; a board having the power to enforce local code provisions; a planning or zoning board, board of adjustments or appeals, community redevelopment agency board, or other board having the power to recommend, create, or modify land planning or zoning within the political subdivision, except for citizen advisory committees, technical coordinating committees, and similar groups who only have the power to make recommendations to planning or zoning boards, except for representatives of a military installation acting on behalf of all military installations within that jurisdiction; a pension board or retirement board empowered to invest pension or retirement funds or to determine entitlement to or amount of a pension or other retirement benefit.
- 3) Any other appointed member of a local government board who is required to file a statement of financial interests by the appointing authority or the enabling legislation, ordinance, or resolution creating the board.
- 4) Persons holding any of these positions in local government: county or city manager; chief administrative employee or finance director of a county, municipality, or other

political subdivision; county or municipal attorney; chief county or municipal building inspector; county or municipal water resources coordinator; county or municipal pollution control director; county or municipal environmental control director; county or municipal administrator with power to grant or deny a land development permit; chief of police; fire chief; municipal clerk; appointed district school superintendent; community college president; district medical examiner; purchasing agent (regardless of title) having the authority to make any purchase exceeding \$35,000 for the local governmental unit.

- 5) Members of governing boards of charter schools operated by a city or other public entity.
- 6) The officers, directors, and chief executive officer of a corporation, partnership, or other business entity that is serving as the chief administrative or executive officer or employee of a political subdivision, and any business entity employee who is acting as the chief administrative or executive officer or employee of the political subdivision. [Sec. 112.3136, Fla. Stat.]

SPECIFIED STATE EMPLOYEE includes:

- 1) Employees in the Office of the Governor or of a Cabinet member who are exempt from the Career Service System, excluding secretarial, clerical, and similar positions.
- 2) The following positions in each state department, commission, board, or council: secretary or state surgeon general, assistant or deputy secretary, executive director, assistant or deputy executive director, and anyone having the power normally conferred upon such persons, regardless of title.
- 3) The following positions in each state department or division: director, assistant or deputy director, bureau chief, assistant bureau chief, and any person having the power normally conferred upon such persons, regardless of title.

- 4) Assistant state attorneys, assistant public defenders, criminal conflict and civil regional counsel, assistant criminal conflict and civil regional counsel, public counsel, full-time state employees serving as counsel or assistant counsel to a state agency, judges of compensation claims, administrative law judges, and hearing officers.
- 5) The superintendent or director of a state mental health institute established for training and research in the mental health field, or any major state institution or facility established for corrections, training, treatment, or rehabilitation.
- 6) State agency business managers, finance and accounting directors, personnel officers, grant coordinators, and purchasing agents (regardless of title) with power to make a purchase exceeding \$35,000.
- 7) The following positions in legislative branch agencies: each employee (other than those employed in maintenance, clerical, secretarial, or similar positions and legislative assistants exempted by the presiding officer of their house); and each employee of the Commission on Ethics.

What Must Be Disclosed:

FORM 1 requirements are set forth fully on the form. In general, this includes the reporting person's sources and types of financial interests, such as the names of employers and addresses of real property holdings. NO DOLLAR VALUES ARE REQUIRED TO BE LISTED. In addition, the form requires the disclosure of certain relationships with, and ownership interests in, specified types of businesses such as banks, savings and loans, insurance companies, and utility companies.

When to File:

CANDIDATES for elected local office must file FORM 1 or a verification of filing in EFDMS together with and at the same time they file their qualifying papers. Candidates for City Council or Mayor must file a Form 6 or a verification of filing in EFDMS.¹

¹ During the pendency of ongoing litigation, the Commission on Ethics is enjoined from enforcing the Form 6 requirement for mayors and elected members of municipal governing bodies, and they will have to file a CE Form 1 ("Statement of Financial Interest").

STATE and LOCAL OFFICERS and SPECIFIED STATE EMPLOYEES are required to file disclosure by July 1 of each year. They also must file within thirty days from the date of appointment or the beginning of employment. Those appointees requiring Senate confirmation must file prior to confirmation.

Where to File:

File with the Commission on Ethics. [Sec. 112.3145, Fla. Stat.]

Beginning January 1, 2024, all Form 1 disclosures must be filed electronically through the Commission's electronic filing system. These disclosures will be published and searchable by name or organization on the Commission's website.

2. *FORM 1F - Final Form 1 Limited Financial Disclosure*

FORM 1F is the disclosure form required to be filed within 60 days after a public officer or employee required to file FORM 1 leaves his or her public position. The form covers the disclosure period between January 1 and the last day of office or employment within that year.

3. *FORM 2 - Quarterly Client Disclosure*

The state officers, local officers, and specified state employees listed above, as well as elected constitutional officers, must file a FORM 2 if they or a partner or associate of their professional firm represent a client for compensation before an agency at their level of government.

A FORM 2 disclosure includes the names of clients represented by the reporting person or by any partner or associate of his or her professional firm for a fee or commission before agencies at the reporting person's level of government. Such representations do not include appearances in ministerial matters, appearances before judges of compensation claims, or representations on behalf of one's agency in one's official capacity. Nor does the term include the preparation and filing of forms and applications merely for the purpose of obtaining or transferring a license, so long as the

issuance of the license does not require a variance, special consideration, or a certificate of public convenience and necessity.

When to File:

This disclosure should be filed quarterly, by the end of the calendar quarter following the calendar quarter during which a reportable representation was made. FORM 2 need not be filed merely to indicate that no reportable representations occurred during the preceding quarter; it should be filed ONLY when reportable representations were made during the quarter.

Where To File:

File with the Commission on Ethics. [Sec. 112.3145(4), Fla. Stat.]

Beginning January 1, 2024, all Form 2 disclosures must be filed electronically through the Commission's electronic filing system. These disclosures will be published and searchable on the Commission's website.

4. FORM 6 - Full and Public Disclosure

Who Must File:

Persons required by law to file FORM 6 include all elected constitutional officers and candidates for such office; the mayor and members of a city council and candidates for these offices²; the Duval County Superintendent of Schools; judges of compensation claims (pursuant to Sec. 440.442, Fla. Stat.); members of the Florida Housing Finance Corporation Board and members of expressway authorities, transportation authorities (except the Jacksonville Transportation Authority), bridge authority, or toll authorities created pursuant to Ch. 348 or 343, or 349, or other general law.

² During the pendency of ongoing litigation, the Commission on Ethics is enjoined from enforcing the Form 6 requirement for mayors and elected members of municipal governing bodies, and they will have to file a CE Form 1 ("Statement of Financial Interest").

What Must be Disclosed:

FORM 6 is a detailed disclosure of assets, liabilities, and sources of income over \$1,000 and their values, as well as net worth. Officials may opt to file their most recent income tax return in lieu of listing sources of income but still must disclose their assets, liabilities, and net worth. In addition, the form requires the disclosure of certain relationships with, and ownership interests in, specified types of businesses such as banks, savings and loans, insurance companies, and utility companies.

When and Where To File:

Officials must file FORM 6 annually by July 1 with the Commission on Ethics.

Beginning January 1, 2023, all Form 6 disclosures must be filed electronically through the Commission's electronic filing system. These disclosures will be published and searchable by name and organization on the Commission's website.

CANDIDATES who do not currently hold a position requiring the filing of a Form 1 or Form 6 must register and use the electronic filing system to complete the Form 6, then print and file the disclosure with the officer before whom they qualify at the time of qualifying. [Art. II, Sec. 8(a) and (i), Fla. Const., and Sec. 112.3144, Fla. Stat.]

5. *FORM 6F - Final Form 6 Full and Public Disclosure*

This is the disclosure form required to be filed within 60 days after a public officer or employee required to file FORM 6 leaves his or her public position. The form covers the disclosure period between January 1 and the last day of office or employment within that year.

6. *FORM 9 - Quarterly Gift Disclosure*

Each person required to file FORM 1 or FORM 6, and each state procurement employee, must file a FORM 9, Quarterly Gift Disclosure, with the Commission on Ethics no later than the last day of any calendar quarter following the calendar quarter in which he or she received a gift worth more

than \$100, other than gifts from relatives, gifts prohibited from being accepted, gifts primarily associated with his or her business or employment, and gifts otherwise required to be disclosed. FORM 9 NEED NOT BE FILED if no such gift was received during the calendar quarter.

Information to be disclosed includes a description of the gift and its value, the name and address of the donor, the date of the gift, and a copy of any receipt for the gift provided by the donor. [Sec. 112.3148, Fla. Stat.]

7. *FORM 10 - Annual Disclosure of Gifts from Government Agencies and Direct-Support Organizations and Honorarium Event Related Expenses*

State government entities, airport authorities, counties, municipalities, school boards, water management districts, and the South Florida Regional Transportation Authority, may give a gift worth more than \$100 to a person required to file FORM 1 or FORM 6, and to state procurement employees, if a public purpose can be shown for the gift. Also, a direct-support organization for a governmental entity may give such a gift to a person who is an officer or employee of that entity. These gifts are to be reported on FORM 10, to be filed by July 1.

The governmental entity or direct-support organization giving the gift must provide the officer or employee with a statement about the gift no later than March 1 of the following year. The officer or employee then must disclose this information by filing a statement by July 1 with his or her annual financial disclosure that describes the gift and lists the donor, the date of the gift, and the value of the total gifts provided during the calendar year. State procurement employees file their statements with the Commission on Ethics. [Sec. 112.3148, Fla. Stat.]

In addition, a person required to file FORM 1 or FORM 6, or a state procurement employee, who receives expenses or payment of expenses related to an honorarium event from someone who is prohibited from giving him or her an honorarium, must disclose annually the name, address, and affiliation of the donor, the amount of the expenses, the date of the event, a description of the expenses paid or provided, and the total value of the expenses on FORM 10. The donor paying the expenses must provide the officer or employee with a statement about the expenses within 60 days of the honorarium event.

The disclosure must be filed by July 1, for expenses received during the previous calendar year. State procurement employees file their statements with the Commission on Ethics. [Sec. 112.3149, Fla. Stat.]

However, notwithstanding Sec. 112.3149, Fla. Stat., no executive branch or legislative lobbyist or principal shall make, directly or indirectly, and no executive branch agency official or employee who files FORM 1 or FORM 6 shall knowingly accept, directly or indirectly, any expenditure made for the purpose of lobbying. This may include gifts or honorarium event related expenses that formerly were permitted under Sections 112.3148 and 112.3149. [Sec. 112.3215, Fla. Stat.] Similar prohibitions apply to legislative officials and employees. However, these laws are not administered by the Commission on Ethics. [Sec. 11.045, Fla. Stat.] In addition, gifts, which include anything not primarily related to political activities authorized under ch. 106, are prohibited from political committees. [Sec. 112.31485 Fla. Stat.]

8. *FORM 30 - Donor's Quarterly Gift Disclosure*

As mentioned above, the following persons and entities generally are prohibited from giving a gift worth more than \$100 to a reporting individual (a person required to file FORM 1 or FORM 6) or to a state procurement employee: a political committee; a lobbyist who lobbies the reporting individual's or procurement employee's agency, and the partner, firm, employer, or principal of such a lobbyist; and vendors. If such person or entity makes a gift worth between \$25 and \$100 to a reporting individual or state procurement employee (that is not accepted in behalf of a governmental entity or charitable organization), the gift should be reported on FORM 30. The donor also must notify the recipient at the time the gift is made that it will be reported.

The FORM 30 should be filed by the last day of the calendar quarter following the calendar quarter in which the gift was made. If the gift was made to an individual in the legislative branch, FORM 30 should be filed with the Lobbyist Registrar. [See page 35 for address.] If the gift was to any other reporting individual or state procurement employee, FORM 30 should be filed with the Commission on Ethics.

However, notwithstanding Section 112.3148, Fla. Stat., no executive branch lobbyist or principal shall make, directly or indirectly, and no executive branch agency official or employee who files FORM 1 or FORM 6 shall knowingly accept, directly or indirectly, any expenditure made for the purpose of lobbying. This may include gifts that formerly were permitted under Section 112.3148. [Sec. 112.3215, Fla. Stat.] Similar prohibitions apply to legislative officials and employees. However, these laws are not administered by the Commission on Ethics. [Sec. 11.045, Fla. Stat.] In addition, gifts from political committees are prohibited. [Sec. 112.31485, Fla. Stat.]

9. *FORM 1X AND FORM 6X - Amendments to Form 1 and Form 6*

These forms are provided for officers or employees to amend their previously filed Form 1 or Form 6.

IV. AVAILABILITY OF FORMS

Beginning January 1, 2024, LOCAL OFFICERS and EMPLOYEES, and OTHER STATE OFFICERS, and SPECIFIED STATE EMPLOYEES who must file FORM 1 annually must file electronically via the Commission's Electronic Financial Disclosure Management System (EFDMS). Paper forms will not be promulgated. Communications regarding the annual filing requirement will be sent via email to filers no later than June 1. Filers must maintain an updated email address in their User Profile in EFDMS.

ELECTED CONSTITUTIONAL OFFICERS and other officials who must file Form 6 annually, including City Commissioners and Mayors³, must file electronically via the Commission's Electronic Financial Disclosure Management System (EFDMS). Paper forms will not be promulgated. Communications regarding the annual filing requirement will be sent via email to filers no later than June 1. Filers must maintain an updated email address in their User Profile in EFDMS.

³ During the pendency of ongoing litigation, the Commission on Ethics is enjoined from enforcing the Form 6 requirement for mayors and elected members of municipal governing bodies, and they will have to file a CE Form 1 ("Statement of Financial Interest").

V. PENALTIES

A. *Non-criminal Penalties for Violation of the Sunshine Amendment and the Code of Ethics*

There are no criminal penalties for violation of the Sunshine Amendment and the Code of Ethics. Penalties for violation of these laws may include: impeachment, removal from office or employment, suspension, public censure, reprimand, demotion, reduction in salary level, forfeiture of no more than one-third salary per month for no more than twelve months, a civil penalty not to exceed \$20,000⁴, and restitution of any pecuniary benefits received, and triple the value of a gift from a political committee.

B. *Penalties for Candidates*

CANDIDATES for public office who are found in violation of the Sunshine Amendment or the Code of Ethics may be subject to one or more of the following penalties: disqualification from being on the ballot, public censure, reprimand, or a civil penalty not to exceed \$20,000*, and triple the value of a gift received from a political committee.

C. *Penalties for Former Officers and Employees*

FORMER PUBLIC OFFICERS or EMPLOYEES who are found in violation of a provision applicable to former officers or employees or whose violation occurred prior to such officer's or employee's leaving public office or employment may be subject to one or more of the following penalties: public censure and reprimand, a civil penalty not to exceed \$20,000*, and restitution of any pecuniary benefits received, and triple the value of a gift received from a political committee.

⁴ Conduct occurring prior to May 11, 2023, is subject to a recommended civil penalty of up to \$10,000. [Ch. 2023-49, Laws of Florida]

D. Penalties for Lobbyists and Others

An executive branch lobbyist who has failed to comply with the Executive Branch Lobbying Registration law (see Part VIII) may be fined up to \$5,000, reprimanded, censured, or prohibited from lobbying executive branch agencies for up to two years. Lobbyists, their employers, principals, partners, and firms, and political committees and committees of continuous existence who give a prohibited gift or honorarium or fail to comply with the gift reporting requirements for gifts worth between \$25 and \$100, may be penalized by a fine of not more than \$5,000 and a prohibition on lobbying, or employing a lobbyist to lobby, before the agency of the public officer or employee to whom the gift was given for up to two years. Any agent or person acting on behalf of a political committee giving a prohibited gift is personally liable for a civil penalty of up to triple the value of the gift.

Executive Branch lobbying firms that fail to timely file their quarterly compensation reports may be fined \$50 per day per report for each day the report is late, up to a maximum fine of \$5,000 per report.

E. Felony Convictions: Forfeiture of Retirement Benefits

Public officers and employees are subject to forfeiture of all rights and benefits under the retirement system to which they belong if convicted of certain offenses. The offenses include embezzlement or theft of public funds; bribery; felonies specified in Chapter 838, Florida Statutes; impeachable offenses; and felonies committed with intent to defraud the public or their public agency. [Sec. 112.3173, Fla. Stat.]

F. Automatic Penalties for Failure to File Annual Disclosure

Public officers and employees required to file either Form 1 or Form 6 annual financial disclosure are subject to automatic fines of \$25 for each day late the form is filed after September 1, up to a maximum penalty of \$1,500. [Sec. 112.3144 and 112.3145, Fla. Stat.]

The Commission must undertake an investigation of a public officer or employee who accrues the \$1,500 maximum fine and currently holds their filing position to determine if the failure to file was willful. If the Commission finds a willful failure to file, the only penalty that can be recommended, by law, is removal from office.

VI. ADVISORY OPINIONS

Conflicts of interest may be avoided by greater awareness of the ethics laws on the part of public officials and employees through advisory assistance from the Commission on Ethics.

A. Who Can Request an Opinion

Any public officer, candidate for public office, or public employee in Florida who is in doubt about the applicability of the standards of conduct or disclosure laws to himself or herself, or anyone who has the power to hire or terminate another public employee, may seek an advisory opinion from the Commission about himself or herself or that employee.

B. How to Request an Opinion

Opinions may be requested by letter presenting a question based on a real situation and including a detailed description of the situation. Opinions are issued by the Commission and are binding on the conduct of the person who is the subject of the opinion, unless material facts were omitted or misstated in the request for the opinion. Published opinions will not bear the name of the persons involved unless they consent to the use of their names; however, the request and all information pertaining to it is a public record, made available to the Commission and to members of the public in advance of the Commission's consideration of the question.

C. How to Obtain Published Opinions

All of the Commission's opinions are available for viewing or download at its website:
www.ethics.state.fl.us.

VII. COMPLAINTS

A. *Citizen Involvement*

The Commission on Ethics cannot conduct investigations of alleged violations of the Sunshine Amendment or the Code of Ethics unless a person files a sworn complaint with the Commission alleging such violation has occurred, or a referral is received, as discussed below.

As of June 21, 2024, the Commission on Ethics may only investigate complaints that are "based upon personal knowledge or information other than hearsay."⁵ In compliance with the new law, ethics complaints that are not "based upon personal knowledge or information other than hearsay" cannot be investigated and will be dismissed.

If you have knowledge that a person in government has violated the standards of conduct or disclosure laws described above, you may report these violations to the Commission by filing a sworn complaint on the form prescribed by the Commission and available for download at www.ethics.state.fl.us. The Commission is unable to take action based on learning of such misdeeds through newspaper reports, telephone calls, or letters.

You can download a complaint form (FORM 50) from the Commission's website: www.ethics.state.fl.us, or contact the Commission office at the address or phone number shown on the inside front cover of this booklet.

B. *Referrals*

The Commission may accept referrals from: the Governor, the Florida Department of Law Enforcement, a State Attorney, or a U.S. Attorney. A vote of six of the Commission's nine members is required to proceed on such a referral.

⁵ Ch. 24-253, § 6, Laws of Fla. (codified at § 112.324(1)(a), Fla. Stat. (2024)).

C. Confidentiality

The complaint or referral, as well as all proceedings and records relating thereto, is confidential until the accused requests that such records be made public or until the matter reaches a stage in the Commission's proceedings where it becomes public. This means that unless the Commission receives a written waiver of confidentiality from the accused, the Commission is not free to release any documents or to comment on a complaint or referral to members of the public or press, so long as the complaint or referral remains in a confidential stage.

A COMPLAINT OR REFERRAL MAY NOT BE FILED WITH RESPECT TO A CANDIDATE ON THE DAY OF THE ELECTION, OR WITHIN THE 30 CALENDAR DAYS PRECEDING THE ELECTION DATE, UNLESS IT IS BASED ON PERSONAL INFORMATION OR INFORMATION OTHER THAN HEARSAY.

D. How the Complaint Process Works

Complaints which allege a matter within the Commission's jurisdiction are assigned a tracking number and Commission staff forwards a copy of the original sworn complaint to the accused within five working days of its receipt. Any subsequent sworn amendments to the complaint also are transmitted within five working days of their receipt.

Once a complaint is filed, it goes through three procedural stages under the Commission's rules. The first stage is a determination of whether the allegations of the complaint are legally sufficient: that is, whether they indicate a possible violation of any law over which the Commission has jurisdiction. If the complaint is found not to be legally sufficient, the Commission will order that the complaint be dismissed without investigation, and all records relating to the complaint will become public at that time.

In cases of very minor financial disclosure violations, the official will be allowed an opportunity to correct or amend his or her disclosure form. Otherwise, if the complaint is found to be legally sufficient, a preliminary investigation will be undertaken by the investigative staff of the Commission. The second stage of the Commission's proceedings involves this preliminary investigation and a decision by the Commission as to whether there is probable cause to believe that

there has been a violation of any of the ethics laws. If the Commission finds no probable cause to believe there has been a violation of the ethics laws, the complaint will be dismissed and will become a matter of public record. If the Commission finds probable cause to believe there has been a violation of the ethics laws, the complaint becomes public and usually enters the third stage of proceedings. This stage requires the Commission to decide whether the law was actually violated and, if so, whether a penalty should be recommended. At this stage, the accused has the right to request a public hearing (trial) at which evidence is presented, or the Commission may order that such a hearing be held. Public hearings usually are held in or near the area where the alleged violation occurred.

When the Commission concludes that a violation has been committed, it issues a public report of its findings and may recommend one or more penalties to the appropriate disciplinary body or official.

When the Commission determines that a person has filed a complaint with knowledge that the complaint contains one or more false allegations or with reckless disregard for whether the complaint contains false allegations, the complainant will be liable for costs plus reasonable attorney's fees incurred by the person complained against. The Department of Legal Affairs may bring a civil action to recover such fees and costs, if they are not paid voluntarily within 30 days.

E. Dismissal of Complaints At Any Stage of Disposition

The Commission may, at its discretion, dismiss any complaint at any stage of disposition should it determine that the public interest would not be served by proceeding further, in which case the Commission will issue a public report stating with particularity its reasons for the dismissal. [Sec. 112.324(12), Fla. Stat.]

F. Statute of Limitations

All sworn complaints alleging a violation of the Sunshine Amendment or the Code of Ethics must be filed with the Commission within five years of the alleged violation or other breach of the public trust. Time starts to run on the day AFTER the violation or breach of public trust is committed. The statute of limitations is tolled on the day a sworn complaint is filed with the Commission. If a

complaint is filed and the statute of limitations has run, the complaint will be dismissed. [Sec. 112.3231, Fla. Stat.]

VIII. EXECUTIVE BRANCH LOBBYING

Any person who, for compensation and on behalf of another, lobbies an agency of the executive branch of state government with respect to a decision in the area of policy or procurement may be required to register as an executive branch lobbyist. Registration is required before lobbying an agency and is renewable annually. In addition, each lobbying firm must file a compensation report with the Commission for each calendar quarter during any portion of which one or more of the firm's lobbyists were registered to represent a principal. As noted above, no executive branch lobbyist or principal can make, directly or indirectly, and no executive branch agency official or employee who files FORM 1 or FORM 6 can knowingly accept, directly or indirectly, **any expenditure** made for the purpose of lobbying. [Sec. 112.3215, Fla. Stat.]

Paying an executive branch lobbyist a contingency fee based upon the outcome of any specific executive branch action, and receiving such a fee, is prohibited. A violation of this prohibition is a first degree misdemeanor, and the amount received is subject to forfeiture. This does not prohibit sales people from receiving a commission. [Sec. 112.3217, Fla. Stat.]

Executive branch departments, state universities, community colleges, and water management districts are prohibited from using public funds to retain an executive branch (or legislative branch) lobbyist, although these agencies may use full-time employees as lobbyists. [Sec. 11.062, Fla. Stat.]

Online registration and filing is available at www.floridalobbyist.gov. Additional information about the executive branch lobbyist registration system may be obtained by contacting the Lobbyist Registrar at the following address:

Executive Branch Lobbyist Registration
Room G-68, Claude Pepper Building
111 W. Madison Street
Tallahassee, FL 32399-1425
Phone: 850/922-4990

IX. WHISTLE-BLOWER'S ACT

In 1986, the Legislature enacted a "Whistle-blower's Act" to protect employees of agencies and government contractors from adverse personnel actions in retaliation for disclosing information in a sworn complaint alleging certain types of improper activities. Since then, the Legislature has revised this law to afford greater protection to these employees.

While this language is contained within the Code of Ethics, the Commission has no jurisdiction or authority to proceed against persons who violate this Act. Therefore, a person who has disclosed information alleging improper conduct governed by this law and who may suffer adverse consequences as a result should contact one or more of the following: the Office of the Chief Inspector General in the Executive Office of the Governor; the Department of Legal Affairs; the Florida Commission on Human Relations; or a private attorney. [Sec. 112.3187 - 112.31895, Fla. Stat.]

X. ADDITIONAL INFORMATION

As mentioned above, we suggest that you review the language used in each law for a more detailed understanding of Florida's ethics laws. The "Sunshine Amendment" is Article II, Section 8, of the Florida Constitution. The Code of Ethics for Public Officers and Employees is contained in Part III of Chapter 112, Florida Statutes.

Additional information about the Commission's functions and interpretations of these laws may be found in Chapter 34 of the Florida Administrative Code, where the Commission's rules are published, and in The Florida Administrative Law Reports, which until 2005 published many of the Commission's final orders. The Commission's rules, orders, and opinions also are available at www.ethics.state.fl.us.

If you are a public officer or employee concerned about your obligations under these laws, the staff of the Commission will be happy to respond to oral and written inquiries by providing information about the law, the Commission's interpretations of the law, and the Commission's procedures.

XI. TRAINING

Constitutional officers, elected municipal officers, commissioners of community redevelopment agencies (CRAs), commissioners of community development districts, and elected local officers of independent special districts are required to receive a total of four hours training, per calendar year, in the areas of ethics, public records, and open meetings. The Commission on Ethics does not track compliance or certify providers. Officials indicate their compliance with the training requirement when they file their annual Form 1 or Form 6.

Visit the training page on the Commission's website for up-to-date rules, opinions, audio/video training, and opportunities for live training conducted by Commission staff.

EXHIBIT 4

EXHIBIT 5

**CASCADES AT GROVELAND COMMUNITY
DEVELOPMENT DISTRICT
NOTICE OF BOARD OF SUPERVISORS
REGULAR MEETING**

Notice is hereby given that a regular meeting of the Board of Supervisors of the Cascades at Groveland Community Development District (the "District") will be held on Wednesday, April 8, 2026, at 2:00 p.m. at the Magnolia House Sports Pavilion, located at 100 Falling Acorn Avenue, Groveland, FL 34746. The purpose of the meeting is to discuss any topics presented to the board for consideration.

Copies of the agenda may be obtained from the District Manager, Vesta District Services, 250 International Parkway, Suite 208, Lake Mary, Florida 32746, Telephone (321) 263-0132, Ext.193.

The meeting is open to the public and will be conducted in accordance with the provisions of Florida law for community development districts. The meeting may be continued in progress without additional notice of a date, time, and place to be specified on the record at the meeting. There may be occasions when Staff and/or Supervisors may participate by speaker telephone.

Pursuant to provisions of the Americans with Disabilities Act, any person requiring special accommodations to participate in the meeting is asked to advise the District Manager's office at least forty-eight (48) hours before the meeting by contacting the District Manager at (321) 263-0132, Ext. 193. If you are hearing or speech impaired, please contact the Florida Relay Service at 711, for assistance in contacting the District Manager's office.

A person who decides to appeal any decision made at the meeting, with respect to any matter considered at the meeting, is advised that a record of the proceedings is needed 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.

Development District
David McInnes, District Manager
(321) 263-0132, Ext. 193
49330 4/01/2026

This Insertion Order Form forms part of the Agreement by and between Customer and Tribune Publishing Company ("**Company**"), and is governed by the terms and conditions set forth in Company's Business Terms of Service (available at <https://www.tribpub.com/central-terms-of-service/>) (the "**Business Terms**") and the Data Processing Addendum (the "**DPA**") The Business Terms, DPA, and this Insertion Order are collectively referred to as the "**Agreement**." The Business Terms and DPA constitute integral parts of this Insertion Order and are hereby incorporated into this Insertion Order by this reference. Capitalized Terms not otherwise defined in this Insertion Order have the same meanings as that ascribed to them in Business Terms. In the event of any ambiguity, conflict, or inconsistency between any of the Business Terms, this Insertion Order, and the DPA, the following order of precedence shall govern for purposes of resolving any such ambiguity, conflict, or inconsistency: (1) this Insertion Order, (2) the DPA, if applicable, and (3) the Business Terms.

EXHIBIT 6

1 **MINUTES OF MEETING**
2 **CASCADES AT GROVELAND**
3 **COMMUNITY DEVELOPMENT DISTRICT**

4 The Regular Meeting of the Board of Supervisors of the Cascades at Groveland Community
5 Development District was held on Wednesday, January 14, 2026 at 2:00 p.m., at Magnolia House Sports
6 Pavilion, 100 Falling Acorn Ave., Groveland, FL 34736.

7 **FIRST ORDER OF BUSINESS – Roll Call**

8 Mr. McInnes called the meeting to order and conducted roll call.

9 Present and constituting a quorum were:

10 James Pekarek	Board Supervisor, Chairman
11 William Houppermans	Board Supervisor, Vice Chairman
12 Robert Szulwach	Board Supervisor, Assistant Secretary
13 John Krobath (<i>joined in progress</i>)	Board Supervisor, Assistant Secretary

14 Also, present were:

15 David McInnes	District Manager, Vesta District Services
16 Patrick Collins (<i>via phone</i>)	District Counsel, Kilinski Van-Wyk

17
18 *The following is a summary of the discussions and actions taken at the January 14, 2026 Cascades at*
19 *Groveland CDD Board of Supervisors Regular Meeting. Audio for this meeting is available upon public*
20 *records request by emailing PublicRecords@vestapropertyservices.com.*

21 **SECOND ORDER OF BUSINESS – Officer Appointment**

22 As no one was appointed to vacant seat #1, the next item followed.

- 23 A. Exhibit 1: Oath of Office – State & District
- 24 B. Exhibit 2: New Supervisor Information Form
- 25 C. Form 1
- 26 D. Exhibit 3: Review of Sunshine Law & Supervisor Duties
- 27 E. Exhibit 4: Consideration & Adoption of **Resolution 2026-06**, Appointing Assistant Secretary

28 **THIRD ORDER OF BUSINESS – Audience Comments** – (*limited to 3 minutes per individual for agenda*
29 *items-Supervisors will respond during agenda item presentation*)

30 There being no audience comments, the next item followed.

31 **FOURTH ORDER OF BUSINESS – Exhibit 5: Presentation of Proof of Publication(s)**

32 **FIFTH ORDER OF BUSINESS – Staff Reports**

- 33 A. District Engineer

34 The District Engineer was not present.

- 35 B. District Counsel

36 Mr. Collins had nothing to report.

37

38 C. District Manager

39 Mr. McInnes had nothing to report.

40 **SIXTH ORDER OF BUSINESS – Consent Agenda**

41 A. Exhibit 6: Consideration for Approval – The Minutes of the Board of Supervisor Regular Meeting
42 Held on October 8, 2025

43 B. Exhibit 7: Consideration for Acceptance – The November 2025 Unaudited Financial Statements

44 On a MOTION by Mr. Pekarek, SECONDED by Mr. Szulwach, WITH ALL IN FAVOR, the Board
45 approved the Consent agenda as presented, for the Cascades at Groveland Community Development
46 District.

47

48 On a MOTION by Mr. Houppermans, SECONDED by Mr. Pekarek, WITH ALL IN FAVOR, the Board
49 recessed the regular meeting for the purpose of holding the public hearing to amend the rules of procedure,
50 for the Cascades at Groveland Community Development District.

51 **SEVENTH ORDER OF BUSINESS – Amended Rules of Procedure**

52 A. Open the Public Hearing

53 On a MOTION by Mr. Houppermans, SECONDED by Mr. Pekarek, WITH ALL IN FAVOR, the Board
54 opened the public hearing for the amended rules of procedure at approximately 2:03 p.m., for the Cascades
55 at Groveland Community Development District.

56 B. Exhibit 8: Presentation of Amended Rules of Procedure

57 Mr. Collins provided a brief overview of the amended rules of procedure.

58 *Supervisor Krobath joined the meeting at approximately 2:06 p.m.*

59 C. Public Comment

60 There being no public comments, the next item followed.

61 D. Close the Public Hearing

62 On a MOTION by Mr. Houppermans, SECONDED by Mr. Szulwach, WITH ALL IN FAVOR, the Board
63 closed the public hearing for the amended rules of procedure at approximately 2:07 p.m. and the regular
64 meeting was reconvened, for the Cascades at Groveland Community Development District.

65 E. Exhibit 9: Consideration & Adoption of **Resolution 2026-07**, Amended Rules of Procedure

66 On a MOTION by Mr. Pekarek, SECONDED by Mr. Krobath, WITH ALL IN FAVOR, the Board adopted
67 **Resolution 2026-07**, Amended Rules of Procedure, for the Cascades at Groveland Community
68 Development District.

69 **EIGHTH ORDER OF BUSINESS – Business Items**

70 **NINTH ORDER OF BUSINESS – Discussion Topics**

71 Mr. Houppermans provided an update on the pages in the storm water book and discussed the
72 possible drainage upgrades. Discussion ensued regarding possible solutions.

73 **TENTH ORDER OF BUSINESS – Supervisors’ Requests**

74 There being no Supervisor requests, the next item followed.

75 **ELEVENTH ORDER OF BUSINESS – Audience Comments – New Business/Non-Agenda** *(limited to*
76 *3 minutes per individual)*

77 There being no audience comments, the next item followed.

78 **TWELFTH ORDER OF BUSINESS – Adjournment**

79 Mr. McInnes asked for final questions, comments, or corrections before requesting a motion to
80 adjourn the meeting. There being none, Mr. Pekarek made a motion to adjourn the meeting.

81 On a MOTION by Mr. Pekarek, SECONDED by Mr. Szulwach, WITH ALL IN FAVOR, the Board
82 adjourned the meeting at 2:42 p.m. for the Cascades at Groveland Community Development District.

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

86 **Meeting minutes were approved at a meeting by vote of the Board of Supervisors at a publicly noticed**
87 **meeting held on April 8, 2026.**

88
89
90
91

Signature

Signature

Printed Name

Printed Name

92 **Title:** **Secretary** **Assistant Secretary**

Title: **Chairman** **Vice Chairman**

EXHIBIT 7

*Cascades at Groveland
Community Development District*

*Financial Statements
(Unaudited)*

February 28, 2026



Cascades At Groveland CDD
Balance Sheet
February 28, 2026

	<u>General Fund</u>	<u>Reserve Fund</u>	<u>Debt Service 2021</u>	<u>TOTAL</u>
1 ASSETS				
2 Cash - Hancock Whitney	\$ 595,792	\$ 16	\$ -	\$ 595,808
3 Money Market - Hancock Whitney	15,166	-	-	15,166
4 Investments - Fidelity	-	0	-	0
5 Investments:	-	-	-	-
6 Revenue Fund	-	-	27,929	27,929
7 Interest Funds	-	-	52	52
8 Sinking Funds	-	-	-	-
9 Prepayment	-	-	-	-
10 Reserve	-	-	48,312	48,312
11 Accounts Receivable	-	-	-	-
12 Assessments Receivable	13,028	5,829	51,580	70,438
13 Other Assessments Receivable	-	-	-	-
14 Due From Other Funds	-	104,060	435,810	539,869
15 Undeposited Funds	-	-	-	-
16 Prepaid Items	-	-	-	-
17 Deposits	-	-	-	-
18 TOTAL ASSETS	\$ 623,986	\$ 109,905	\$ 563,683	\$ 1,297,574
19 LIABILITIES				
20 Accounts Payable	\$ 12	\$ -	\$ -	\$ 12
21 Deferred Revenue	13,028	5,829	51,580	70,438
22 Due To Other Funds	539,869	-	-	539,869
23 Accrued Expenses	-	-	-	-
24 TOTAL LIABILITIES	552,910	5,829	51,580	610,320
25 FUND BALANCE				
26 Restricted				
27 Debt Service	-	-	-	-
28 Capital Projects	-	-	-	-
29 Unassigned	71,076	104,076	512,103	687,255
30 TOTAL FUND BALANCE	71,076	104,076	512,103	687,255
31 TOTAL LIABILITIES & FUND BALANCE	\$ 623,986	\$ 109,905	\$ 563,683	\$ 1,297,574

Bonds outstanding from debt service series 2021: \$951,000

Total Debt Service Lots On Roll 1046

Cascades At Groveland CDD

General Fund

Statement of Revenues, Expenditures, and Changes in Fund Balance

For the period from October 1, 2025 to February 28, 2026

	FY 2026 Adopted Budget	FY 2026 Month of February	FY 2026 Total Actual Year-to-Date	VARIANCE Over (Under) to Budget	% Actual YTD / FY Budget
1 REVENUES					
2 Assessment On Roll (Net)	\$ 122,921	\$ 10,083	\$ 109,893	(13,028)	89%
3 Fund Balance Forward	8,202	-	-	(8,202)	
4 Interest Revenue	-	5	25	25	
5 Miscellaneous Revenue	-	-	-	-	
6 TOTAL REVENUES	131,123	10,088	109,918	(21,205)	84%
7 EXPENDITURES					
8 FINANCIAL & ADMINISTRATIVE					
9 Administrative Services	2,646	221	1,103	(1,544)	42%
10 District Management	10,806	901	4,503	(6,304)	42%
11 District Engineer	3,000	-	-	(3,000)	0%
12 Dissemination Agent & Disclosure Report	1,323	-	1,323	-	100%
13 Trustee Fees	4,150	-	2,420	(1,730)	58%
14 Financial & Revenue Collection & Assessments	6,618	552	2,758	(3,861)	42%
15 Accounting Services	9,263	772	3,860	(5,403)	42%
16 Auditing Services	3,950	-	-	(3,950)	0%
17 Arbitrage Rebate Calculation	650	-	-	(650)	0%
18 Public Officials Liability Insurance	6,925	-	6,163	(762)	89%
19 Legal Advertising	1,500	-	806	(694)	54%
20 Dues, Licenses & Fees	175	-	175	-	100%
21 Tax Collector/Property Appriaser Fees	50	-	-	(50)	0%
22 Website Hosting, Maintenance, Backup	1,692	-	-	(1,692)	0%
23 Contingency	20,000	12	56	(19,944)	0%
24 LEGAL COUNSEL					
25 District Counsel	7,200	667	2,105	(5,095)	29%
26 TOTAL FINANCIAL & ADMINISTRATIVE	79,948	3,124	25,270	(54,678)	32%
27 FIELD EXPENDITURES					
28 STORMWATER CONTROL					
29 Dry Retention Pond Maintenance	46,765	3,802	19,360	(27,405)	41%
30 OTHER PHYSICAL ENVIRONMENT					
31 Pressure Washing	4,410	-	-	(4,410)	0%
32 TOTAL FIELD EXPENDITURES	51,175	3,802	19,360	(31,815)	38%
33 TOTAL EXPENDITURES	131,123	6,926	44,630	(86,493)	34%
34 REVENUES OVER (UNDER) EXPENDITURES	-	3,162	65,287	65,287	
35 OTHER FINANCING SOURCES & USES					
36 Transfers In	-	-	-	-	
37 Transfers Out	-	-	-	-	
38 TOTAL OTHER FINANCING SOURCES & USES	-	-	-	-	
39 NET CHANGE IN FUND BALANCE	-	3,162	65,287	65,287	
40 Fund Balance - Beginning	8,203		5,789	(2,414)	
41 Increase (Decrease) in Operating Fund Bal.	(8,202)				
42 FUND BALANCE - ENDING - PROJECTED	\$ 1		\$ 71,076	\$ 62,873	

Cascades At Groveland CDD

Reserve Fund

Statement of Revenues, Expenditures, and Changes in Fund Balance

For the period from October 1, 2025 to February 28, 2026

	FY 2026 Adopted Budget	FY 2026 Actual Year-to-Date	VARIANCE Over (Under) to Budget
1 REVENUES			
2 Special Assessments - On Roll (Net)	\$ 55,000	\$ 49,171	\$ (5,829)
3 Fund Balance Forward	-	-	-
4 Interest Earnings	-	-	-
5 TOTAL REVENUES	\$ 55,000	\$ 49,171	(5,829)
6 EXPENDITURES			
7 Capital Projects	-	-	-
8 Misc. Reserve Contribution	55,000	-	(55,000)
9 TOTAL EXPENDITURES	55,000	-	(55,000)
10 REVENUES OVER (UNDER) EXPENDITURES	-	49,171	49,171
11 OTHER FINANCING SOURCES (USES)			
12 Transfers In	-	-	-
13 Transfers Out	-	-	-
14 TOTAL OTHER FINANCING SOURCES (USES)	-	-	-
15 NET CHANGE IN FUND BALANCE	-	49,171	49,171
16 Fund Balance - Beginning	(508)	54,905	55,413
17 FUND BALANCE - ENDING - PROJECTED	\$ (508)	\$ 104,076	\$ 104,584

Cascades At Groveland CDD

Debt Service - Series 2021

Statement of Revenues, Expenditures, and Changes in Fund Balance

For the period from October 1, 2025 to February 28, 2026

	FY 2026 Adopted Budget	FY 2026 Actual Year-to-Date	VARIANCE Over (Under) to Budget
1 REVENUES			
2 Special Assessments - On Roll (Net)	\$ 486,650	\$ 435,070	\$ (51,580)
3 Interest Revenue	-	962	962
4 Misc. Revenue	-	-	-
5 TOTAL REVENUES	486,650	436,032	(50,618)
6 EXPENDITURES			
7 Interest Expense			
8 * November 1, 2025	9,510	9,510	-
9 May 1, 2026	9,540	-	9,540
10 November 1, 2026	4,790	-	4,790
11 Principal Retirement			
12 May 1, 2026	472,000	-	472,000
13 Principal Prepayment	-	-	-
14 TOTAL EXPENDITURES	486,330	9,510	(476,820)
15 REVENUES OVER (UNDER) EXPENDITURES	320	426,522	426,202
16 OTHER FINANCING SOURCES & USES			
17 Transfers In	-	-	-
18 Transfers Out	-	-	-
19 TOTAL OTHER FINANCING SOURCES & USES	-	-	-
20 NET CHANGE IN FUND BALANCE	320	426,522	426,202
21 Fund Balance - Beginning		85,581	85,581
22 FUND BALANCE - ENDING - PROJECTED	\$ 320	\$ 512,103	\$ 511,783

* financed by prior year revenue

**Cascades at Groveland
Check Register - FY2026**

Date	Number	Name	Memo	Deposits	Payments	Balance
09/30/2025		Beginning of Year				48,580.76
10/07/2025	100146	Contours Landscape Solution, Inc.	Invoice: 10575 (Reference: Landscape Maintenance: 10/2025.)		3,802.00	44,778.76
10/07/2025	100147	Vesta District Services	Invoice: 428927 (Reference: Management fees.)		2,444.42	42,334.34
10/08/2025	100148	Kilinski Van Wyk, PLLC	Invoice: 13239 (Reference: general legal services.)		1,089.00	41,245.34
10/08/2025	1149	EGIS Insurance & Risk Advisors	Insurance Polciy # 100125248 10/01/25-10/01/26		6,163.00	35,082.34
10/08/2025	100149	Vesta District Services	Invoice: 428974 (Reference: FY?2026 Dissmination Agent Fee.)		1,323.00	33,759.34
10/13/2025	1150	Von Etcher Builders			3,998.00	29,761.34
10/14/2025	100150	Vesta District Services	Invoice: 429044 (Reference: Billable Expenses - SEP 2025.)		262.27	29,499.07
10/28/2025	1151	SchoolNow	Reference: Website Hosting.		384.38	29,114.69
10/31/2025	68		Excess Fees FY25	269.69		29,384.38
10/31/2025	68		Excess Fees FY25	740.73		30,125.11
10/31/2025		End of Month		1,010.42	19,466.07	30,125.11
11/04/2025	100151	Contours Landscape Solution, Inc.	Invoice: 10679 (Reference: Landscape Maintenance: 11/2025.)		3,802.00	26,323.11
11/10/2025	100152	Vesta District Services	Invoice: 429495 (Reference: Management Fees Nov 25.)		2,444.42	23,878.69
11/17/2025	100153	Kilinski Van Wyk, PLLC	Invoice: 13446 (Reference: General Counsel.)		1,229.25	22,649.44
11/18/2025			Deposit	4,498.65		27,148.09
11/18/2025			Deposit	10,974.56		38,122.65
11/21/2025	1152	FLORIDA DEPT OF ECONOMIC OPPORTUNIT	FY 2025/2026 Special District Fee Invoice/Update Form		175.00	37,947.65
11/28/2025			Deposit	36,082.04		74,029.69
11/28/2025			Deposit	93,396.71		167,426.40
11/30/2025		End of Month		144,951.96	7,650.67	167,426.40
12/01/2025	1153	Von Etcher Builders	Scope of Work: Repair concrete around street gates copy edges		350.00	167,076.40
12/03/2025	100154	Contours Landscape Solution, Inc.	Invoice: 10777 (Reference: Landscape Maintenance: 12/2025.)		3,802.00	163,274.40
12/15/2025	100155	Kilinski Van Wyk, PLLC	Invoice: 13676 (Reference: Legal Services: 11/2025.)		132.00	163,142.40
12/15/2025	100156	Vesta District Services	Invoice: 429983 (Reference: Management Fees Dec 25.)		2,444.42	160,697.98
12/16/2025	1154	Vesta District Services	Reference: Billable Expenses Oct 2025.		20.95	160,677.03
12/19/2025			Deposit	22,551.26		183,228.29
12/19/2025			Deposit	60,240.88		243,469.17
12/31/2025			Deposit	82,117.73		325,586.90
12/31/2025			Deposit	229,756.07		555,342.97
12/31/2025		End of Month		394,665.94	6,749.37	555,342.97
01/07/2026	100157	Contours Landscape Solution, Inc.	Invoice: 10860 (Reference: Landscape Maintenance: 1/2026.)		3,802.00	551,540.97
01/07/2026	100158	Vesta District Services	Invoice: 430299 (Reference: JAN26 District Management services.)		2,444.42	549,096.55
01/14/2026	100159	Kilinski Van Wyk, PLLC	Invoice: 13906 (Reference: Monitor and report on bills affecting special districts..)		77.00	549,019.55
01/14/2026	100160	Vesta District Services	Invoice: 430377 (Reference: Billable Expenses -Dec 2025.)		828.93	548,190.62
01/31/2026		End of Month		0.00	7,152.35	548,190.62
02/02/2026	100161	Vesta District Services	Invoice: 430644 (Reference: FEB26 District Management services.)		2,444.42	545,746.20
02/02/2026			Deposit	13,969.81		559,716.01
02/02/2026			Deposit	40,545.23		600,261.24
02/20/2026	100162	Contours Landscape Solution, Inc.	Invoice: 10980 (Reference: Landscape Maintenance: 2/2026.)		3,802.00	596,459.24
02/23/2026	100163	Kilinski Van Wyk, PLLC	Invoice: 14142 (Reference: General Counsel- legal services for 1/2026.)		667.00	595,792.24
02/28/2026		End of Month		54,515.04	6,913.42	595,792.24

EXHIBIT 8

RESOLUTION 2026-09

A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE CASCADES AT GROVELAND COMMUNITY DEVELOPMENT DISTRICT APPROVING A PROPOSED BUDGET FOR FISCAL YEAR 2027 AND SETTING A PUBLIC HEARING THEREON PURSUANT TO FLORIDA LAW; ADDRESSING TRANSMITTAL, POSTING AND PUBLICATION REQUIREMENTS; ADDRESSING SEVERABILITY; AND PROVIDING AN EFFECTIVE DATE.

WHEREAS, the District Manager has, prior to June 15, 2026, prepared and submitted to the Board of Supervisors (“**Board**”) of the Cascades at Groveland Community Development District (“**District**”) a proposed budget (“**Proposed Budget**”) for the Fiscal Year beginning October 1, 2026, and ending September 30, 2027 (“**Fiscal Year 2027**”); and

WHEREAS, the Board has considered the Proposed Budget and desires to set the required public hearing thereon.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE CASCADES AT GROVELAND COMMUNITY DEVELOPMENT DISTRICT:

1. **PROPOSED BUDGET APPROVED.** The Proposed Budget prepared by the District Manager for Fiscal Year 2027 attached hereto as **Exhibit A** is hereby approved as the basis for conducting a public hearing to adopt said Proposed Budget.

2. **SETTING A PUBLIC HEARING.** A public hearing on said approved Proposed Budget is hereby declared and set for the following date, hour and location:

DATE: Wednesday, July 8, 2026

HOUR: 2:00 p.m.

LOCATION: Magnolia House Sports Pavilion
100 Falling Acorn Avenue
Groveland, Florida 34736

3. **TRANSMITTAL OF PROPOSED BUDGET TO LOCAL GENERAL PURPOSE GOVERNMENT.** The District Manager is hereby directed to submit a copy of the Proposed Budget to the City of Groveland and Lake County, Florida at least sixty (60) days prior to the hearing set above.

4. **POSTING OF PROPOSED BUDGET.** In accordance with Section 189.016, *Florida Statutes*, the District’s Secretary is further directed to post the approved Proposed Budget

on the District's website at least two (2) days before the budget hearing date as set forth in Section 2, and shall remain on the website for at least forty-five (45) days.

5. **PUBLICATION OF NOTICE.** Notice of this public hearing shall be published in the manner prescribed in Florida law.

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

7. **EFFECTIVE DATE.** This Resolution shall take effect immediately upon adoption.

PASSED AND ADOPTED THIS 8th DAY OF APRIL, 2026.

ATTEST:

**CASCADES AT GROVELAND
COMMUNITY DEVELOPMENT
DISTRICT**

Secretary

By: _____
Its: _____

Exhibit A: Proposed Budget for Fiscal Year 2027

**CASCADES AT GROVELAND COMMUNITY DEVELOPMENT DISTRICT
FISCAL YEAR 2026-2027 PROPOSED BUDGET
GENERAL FUND, OPERATIONS & MAINTENANCE (O&M)**

	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 ADOPTED	FY 2027 PROPOSED	VARIANCE FY26 TO FY27
1 REVENUE					
2 O&M ASSESSMENT COLLECTION	\$ 121,750	\$ 123,844	\$ 122,921	\$ 132,323	\$ 9,402
3 FUND BALANCE FORWARD			8,202	-	(8,202)
4 INTEREST	77	64			-
5 MISCELLANEOUS REVENUE	16,751				-
6 TOTAL REVENUE	138,578	123,908	131,123	132,323	1,200
7					
8 EXPENDITURES					
9 FINANCIAL & ADMINISTRATIVE					
10 ADMINISTRATIVE SERVICES	2,400	2,568	2,646	2,725	79
11 DISTRICT MANAGEMENT	9,805	10,491	10,806	11,130	324
12 DISTRICT ENGINEER	3,500	1,195	3,000	3,000	-
13 DISSEMINATION AGENT & DISCLOSURE REPORT	1,200	1,284	1,323	1,363	40
14 TRUSTEE FEES	4,148	1,728	4,150	3,950	(200)
15 FINANCIAL & REVENUE COLLECTION & ASSESMENTS	6,005	6,425	6,618	6,817	199
16 ACCOUNTING SERVICES	8,405	8,993	9,263	9,541	278
17 AUDITING SERVICES	3,600	3,800	3,950	4,100	150
18 ARBITRAGE REBATE CALCULATION	650	650	650	650	-
19 PUBLIC OFFICALS LIABILITY INSURANCE	5,590	5,814	6,925	6,800	(125)
20 LEGAL ADVERTISING	1,818	829	1,500	1,500	-
21 DUES, LICENSES & FEES	175	175	175	175	-
22 TAX COLLECTOR/PROPERTY APPRIASER FEES	-	-	50	50	-
23 WEBSITE HOSTING, MAINTENANCE, BACKUP	1,538	1,538	1,692	1,692	-
24 CONTINGENCY	126	729	20,000	20,000	-
25 LEGAL COUNSEL					
26 DISTRICT COUNSEL	5,795	5,789	7,200	7,200	-
27 ADMIN SUBTOTAL	54,755	52,008	79,948	80,693	745
28					
29 FIELD EXPENDITURES					
30 STORMWATER CONTROL					
31 DRY RETENTION POND MAINTENANCE	45,624	86,960	46,765	47,220	455
32 OTHER PHYSICAL ENVIORNMENT					
33 PRESSURE WASHING	4,200		4,410	4,410	-
34 MISC. FIELD EXPENSE	28,851		-	-	-
35 FIELD OPERATIONS SUBTOTAL	78,675	86,960	51,175	51,630	455
36					
37 TOTAL EXPENDITURES	133,430	138,969	131,123	132,323	1,200
38					
39 EXCESS OF REVENUES OVER (UNDER) EXPEND.	5,148	(15,061)	-	-	-
40					
41 FUND BALANCE					
42 FUND BALANCE BEGINNING	15,702	20,850	5,789	-	(5,789)
43 NET CHANGE IN FUND BALANCE	5,148	(15,061)	-	-	-
44 TRANSFER IN FROM CRF - FY26 AMENDMENT	-	-	1,710	-	(1,710)
45 FUND BALANCE FORWARD	-	-	(7,499)	-	7,499
46 FUND BALANCE ENDING	20,850	5,789	-	-	-

**CASCADES AT GROVELAND COMMUNITY DEVELOPMENT DISTRICT
FISCAL YEAR 2026-2027 PROPOSED BUDGET
CAPITAL RESERVE FUND (CRF)**

	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 ADOPTED	FY 2027 PROPOSED	VARIANCE FY26 TO FY27
1 REVENUES					
2 SPECIAL ASSESSMENTS - ON ROLL (NET)	\$ 54,476	\$ 55,413	\$ 55,000	\$ 45,598	\$ (9,402)
3 FUND BALANCE FORWARD			-	-	-
4 INTEREST EARNINGS			-	-	-
5 TOTAL REVENUES	54,476	55,413	55,000	45,598	(9,402)
6 EXPENDITURES					
7 CAPITAL PROJECTS	55,000		-	-	-
8 RESERVE CONTRIBUTION			55,000	45,598	(9,402)
9 TOTAL EXPENDITURES	55,000	-	55,000	45,598	(9,402)
10 EXCESS OF REVENUES OVER (UNDER) EXPEND.	(524)	55,413	-	-	-
11 FUND BALANCE					
12 FUND BALANCE BEGINNING	16	(508)	54,905	53,195	(1,710)
13 NET CHANGE IN FUND BALANCE	(524)	55,413	-	-	-
14 TRANSFER (OUT) TO GF - FY2026 AMENDMENT	-	-	(1,710)		1,710
15 FUND BALANCE ENDING	\$ (508)	\$ 54,905	\$ 53,195	\$ 53,195	\$ -

CASCADES AT GROVELAND COMMUNITY DEVELOPMENT DISTRICT

FISCAL YEAR 2026-2027 PROPOSED BUDGET

BUDGET NARRATIVE

	FINANCIAL STATEMENT CATEGORY	ANNUAL AMOUNT	COMMENTS/SCOPE OF SERVICE
1	EXPENDITURES		
2	FINANCIAL & ADMINISTRATIVE		
3	ADMINISTRATIVE SERVICES	2,725	3% increase from FY 2026
4	DISTRICT MANAGEMENT	11,130	3% increase from FY 2026
5	DISTRICT ENGINEER	3,000	Same as FY 2026
6	DESSEMINATION AGENT & DISCLOSURE REPORT	1,363	3% increase from FY 2026
7	TRUSTEE FEES	3,950	Decrease from FY 2026
8	FINANCIAL & REVENUE COLLECTION & ASSESSMENTS	6,817	3% increase from FY 2026
9	ACCOUNTING SERVICES	9,541	3% increase from FY 2026
10	AUDITING SERVICES	4,100	DMHB contract dated 4/22/2024
11	ARBITRAGE REBATE CALCULATION	650	Same as FY 2026
12	PUBLIC OFFICALS/GENERAL LIABILITY INSURANCE	6,800	Based on Predicted Premiums from Egis (as of 3/16/2028)
13	LEGAL ADVERTISING	1,500	Same as FY 2026
14	DUES, LICENSES & FEES	175	Fee paid to state annually
15	TAX COLLECTOR/PROPERTY APPRIASER FEES	50	Same as FY 2026
16	WEBSITE HOSTING, MAINTENANCE, BACKUP	1,692	Same as FY 2026
17	CONTINGENCY	20,000	Same as FY 2026
18	LEGAL COUNSEL		
19	DISTRICT COUNSEL	7,200	Same as FY 2026
20	ADMIN SUBTOTAL	80,693	
21	FIELD EXPENDITURES		
22	STORMWATER CONTROL		
23	DRY RETENTION POND MAINTENANCE	47,220	3/18/2026: Proposal from Countours Landscape Solutions
24	OTHER PHYSICAL ENVIORNMENT		
25	PRESSURE WASHING	4,410	Same as FY 2026
26	MISC. FIELD EXPENSE	-	
27	FIELD OPERATIONS SUBTOTAL	51,630	
28	TOTAL EXPENDITURES	132,323	

**CASCADES AT GROVELAND COMMUNITY DEVELOPMENT DISTRICT
FISCAL YEAR 2026-2027 PROPOSED BUDGET
ASSESSMENT ALLOCATION**

TOTAL O&M & CRF BUDGET	\$177,921.00
COUNTY COLLECTION COSTS	\$3,785.55
EARLY PAYMENT DISCOUNTS	\$7,571.11
TOTAL GROSS O&M ASSESSMENT	\$189,277.66

LOT TYPE	UNITS ASSESSED	
	O&M	SERIES 2021 DEBT SERVICE ⁽¹⁾
PLATTED RESIDENTIAL UNIT	1145	1046
	1145	1046

ALLOCATION OF O&M ASSESSMENT		
ERU FACTOR	TOTAL ERU's	TOTAL O&M BUDGET
1.0	1145.0	\$189,277.66
	1145.0	\$189,277.66

ANNUAL ASSESSMENTS PER UNIT		
O&M ⁽²⁾	SERIES 2021 DEBT SERVICE ⁽³⁾	TOTAL ⁽⁴⁾
\$165.31	\$496.37	\$661.68

	ANNUAL ASSESSMENTS PER UNIT		
	FY 2026	FY 2027	VARIANCE
OPERATIONS & MAINTENANCE	\$165.31	\$165.31	\$0.00
DEBT SERVICE	\$496.37	\$496.37	\$0.00
TOTAL CDD ASSESSMENT	\$661.68	\$661.68	\$0.00

⁽¹⁾ Reflects the total number of lots with Series 2021 debt outstanding.

⁽²⁾ Reflects O&M assessment per unit approved by the Board of Supervisors.

⁽³⁾ Annual debt service assessments per unit adopted in connection with the Series 2021 refunding bond issuance. Annual Assessments includes principal, interest, Lake County collection costs and early payment discounts.

⁽⁴⁾ Annual assessments that will appear on the November, 2026 Lake County property tax bill. Amount shown includes all applicable county collection costs (2%) and early payment discounts (up to 4% if paid early).

**CASCADES AT GROVELAND COMMUNITY DEVELOPMENT DISTRICT
FISCAL YEAR 2026-2027 PROPOSED BUDGET
DEBT SERVICE REQUIREMENTS**

	Series 2021
REVENUES	
SPECIAL ASSESSMENTS (NET)	\$ 486,650
TOTAL REVENUES	486,650
EXPENDITURES	
INTEREST EXPENSE	
5/1/2027	4,790
11/1/2027	-
PRINCIPAL EXPENSE	
5/1/2027	479,000
TOTAL EXPENDITURES	483,790
EXCESS OF REVENUES OVER EXPENDITURES	\$ 2,860

NET DEBT SERVICE	\$ 486,650.00
COLLECTION COST & EARLY PMT. DISCOUNT	\$ 31,062.77
GROSS DEBT SERVICE ASSESSMENTS	\$ 517,712.77

**CASCADES AT GROVELAND COMMUNITY DEVELOPMENT DISTRICT
FISCAL YEAR 2026-2027 PROPOSED BUDGET
Capital Improvement Revenue Refunding Bond Series 2021**

Period Ending	Principal	Coupon	Interest	Debt Service	Annual Debt Service	Amount Outstanding
						1,414,000
5/1/2025	463,000	2.000%	14,140	477,140		951,000
11/1/2025	-	2.000%	9,510	9,510	486,650	951,000
5/1/2026	472,000	2.000%	9,510	481,510		479,000
11/1/2026	-	2.000%	4,790	4,790	486,300	479,000
5/1/2027	479,000	2.000%	4,790	483,790	483,790	-
Total	1,414,000		42,740	1,456,740	1,456,740	

MAXIMUM ANNUAL DEBT SERVICE: \$486,650

Footnote:

(a) Data herein for the CDD's budgetary process purposes only.

EXHIBIT 9



LANDSCAPE MAINTENANCE SERVICES

**CASCADES OF GROVELAND COMMUNITY DEVELOPMENT DISTRICT
542 NARROWVIEW LANE
GROVELAND, FL 34736**

Sales: Nathanael White

2026 Landscape Maintenance Services
542 Narrowview Lane Groveland, FL 34736

Est ID: EST3653650
Date: Mar-18-2026

Email: dmcinnes@vestapropertyservices.com
Phone:

THIS LANDSCAPE MAINTENANCE AGREEMENT RENEWAL (hereinafter referred to as the "Agreement") is made and entered into by and between:

*Contours Landscape Solution, a Florida Corporation located at
(hereinafter referred to as "Contractor"),*

AND

CASCADES OF GROVELAND COMMUNITY DEVELOPMENT DISTRICT a Florida Corporation whose address is, ***C/O VESTA PROPERTY SERVICES***

(hereinafter referred to as "Owner" and, together with the Contractor, the "Parties").

WHEREAS, Contractor is in the business of providing landscape maintenance services and Owner desires to contract with Contractor to provide landscape maintenance services to Owner and certain properties managed by Owner in accordance with the terms and conditions of this Agreement.

NOW, THEREFORE, in consideration of the mutual promises set forth herein and for other good and valuable consideration, the adequacy and receipt of which are hereby acknowledged, and intending to be legally bound by the terms and conditions of this Agreement, the parties hereto agree as follows:

DESCRIPTION OF WORK AND GENERAL SERVICES

1. Contractor will provide all labor, supervision, and equipment necessary to carry out all work agreed upon by the parties

2. Contractor will always perform all work in a safe and professional manner, while also complying with all applicable federal, state and local laws, rules and regulations.
3. There shall not be any changes, modifications or variances made to this Agreement, unless agreed to by both parties in writing, as evidenced by delivery of a properly executed addendum.
4. Contractor shall assign an Operations Manager to the Owner/Property who will serve as the single point of contact for Owner.
5. Contractor agrees that all employees shall be uniformed and adequately knowledgeable regarding the specific task they are performing.
6. Contractor shall provide an operational calendar and/or monthly service reports, upon request.
7. The landscape maintenance contractor shall perform all work required to fulfill the spirit and intent of the Contract. The workers shall be neat in appearance, perform their work in a professional manner, keep noise to a minimum and stage their work from a location on the site out of the mainstream of the users.
8. Contractor shall be held fully harmless by Owner and shall not be held responsible for the treatment or replacement of any turf, shrubs, groundcovers, palms or trees that is damaged as a result of geographical intolerance, watering restrictions, improper plant selections for surrounding environment (poor sunlight, soil structure, etc.), wildlife damage, freeze damage, storm damage, or any disease or insects considered to be beyond curable.
9. Contractor shall be held harmless and not be responsible for any damages caused from any Owner action or inaction or neglect or improper installation by a party not affiliated with Contractor.
10. Contractor shall maintain a valid Florida Pesticide Applicator's License and use chemicals in strict accordance with Federal, State & County directives on environmental control. Chemicals must have EPA approval #'s and labels made available to the Association per request.
11. Contractor's liability under the performance of this Agreement shall be limited to the value of the services in question.
12. It is understood the Customer will have the option to add homes maintenance services to monthly billing according to the individual home or cottage price sheet (see attached) prior to each month.

INSURANCE, LICENCES/CERTIFICATIONS, EMPLOYEES & COMPLIANCE

1. Contractor will maintain general liability, property damage, and worker's compensation insurance coverage with the minimum limit amounts as listed. Contractor will furnish certificates of insurance detailing the coverage.
 - INSURANCE COVERAGE LIMITS
 - COMMERCIAL GENERAL LIABILITY – AGGREGATE \$ 1,000,000
 - PRODUCTS- COMP/OP AGG 1,000,000
 - PERSONAL & ADV. INJURY 500,000
 - EACH OCCURRENCE 500,000
 - FIRE DAMAGE 50,000
 - MEDICAL EXPENSES 5,000
 - AUTOMOBILE LIABILITY 1,000,000 combine single limit
 - WORKERS COMPENSATION AND EMPLOYERS' LIABILITY- STATUTORY LIMITS

LICENSES/CERTIFICATIONS

1. Contractor will maintain at all times the necessary licenses and/ or permits required to perform said work in the State of Florida. In addition, the Contractor shall possess the following.

COMPLIANCE

1. Contractor shall comply with all applicable provisions of the Equal Employment Opportunity Act, Executive Order 11246 of September 24, 1965, the Americans with Disabilities Act and other applicable laws and orders.

INDEMNIFICATION

1. Indemnification : Contractor shall be responsible for any damage directly and proximately caused by its performance or the nonperformance of its obligations under this agreement, provided; however, that Contractor's indemnity obligations shall be comparatively reduced to the extent that any claims, demands, liabilities, losses, damages, causes of action, suits, proceedings, judgments, costs, awards, and/or expenses are caused in whole or in part by the negligent, grossly negligent or intentional act of an Customer, any other contractor of the Customer, or any other party indemnified hereunder; and provided , further, that the forgoing indemnity will not apply if the claims, liabilities s, losses, demands, damages, causes of action, suits, judgments, awards, proceedings, costs and/or expenses are caused in whole by the Customer, and other contractor of the Customer, and/or any other party indemnified hereunder.

NEGLECT AND VANDALISM

1. Turf, shrubs, trees or plants that are damaged or killed due to landscape maintenance contractor's operations, negligence or chemicals, shall be replaced at no cost to the Owners. If plant damage or death is caused by conditions beyond the landscape maintenance contractor's control, replacement shall be at the Owners expense.
2. Sprinklers or structures that are damaged by others shall be promptly brought to the Owners attention.
3. All damage to or thefts of landscaping and irrigation installation not caused or allowed by Contractor shall be corrected by the Contractor at the Owners expense upon authorization to proceed.

OTHER/MISCELLANEOUS

1. Contractor may engage the services of qualified subcontractors to fulfill certain requirements set forth by this Agreement without further approval of Owner.
2. Contractor retains the right to assign or transfer this Agreement as a result of any sale, merger, consolidation or liquidation, upon approval by the Customer, Owner or Association provided a (10) day written notice of proof is provided.
3. This Agreement and the exhibits attached hereto constitute the entire Agreement between both parties pertaining to the subject matter hereof and may not be modified orally or otherwise than by written amendments executed on behalf of each party.
4. The obligations and covenants of this Agreement shall bind and benefit the successors, personal representatives, heirs and assigns of both parties hereto.
5. This Agreement may be executed in two or more counterparts, each of which shall be and be taken to be an original, and all collectively but one instrument. Facsimile signatures and electronically transmitted signatures shall be considered binding executions of each party upon proof of delivery in accordance with this Agreement.
6. The doctrine of Force Majeure shall govern the performance terms and conditions of this Agreement.

COMPENSATION AND TERMS

1. Owner agrees to pay the Contractor compensation for services described in this Agreement, with 30 Day payment term, in 12 monthly payments according to the payment schedule and in a total amount of the

contract price services total, annually. Work shall Commence on **JULY 16, 2026** and end **JULY 15, 2027**.

2. In the absence of notification, and with mutual agreement by both parties. This proposal shall automatically renew under the same services for one additional year with a 3% CPI cap for the second year unless the customer cancels with a 45 day notice prior to the end of the first year.
3. All payments are due within (15) days from the date of the invoice and become past due after (30) days from the date of the invoice.
4. Owner agrees to pay a (2 ½%) monthly service charge for all balances not paid within (31) days of invoice date.
5. Owner agrees not to withhold payment for any performance related issues until after Contractor has been provided with a written notice that clearly outlines any deficiencies and allowing Contractor (15) days to either properly address or cure those deficiencies.
6. Any dispute or controversy between the parties resulting in litigation shall be governed by the laws of the State of Florida with the venue for mediation or litigation being Lake County, Florida.
7. In the event of any disputes by and between the parties to this Agreement, the prevailing party shall be entitled to recover from the non- prevailing party all attorney's fees, paralegal fees, costs and interest through all tribunals, appeals, bankruptcy proceedings and collection efforts.

CANCELLATION

1. This contract may be canceled with cause, by customer upon (90) days written notice, provided Customer has notified Contractor by written notice with specific reference to alleged deficiencies. Upon receipt of notification, Contractor shall have up to (15) working days to correct the identified concerns or come to an agreement to remedy alleged deficiencies in a timely manner.
2. Upon noncompliance of notification and time for correction, a 90-day cancellation shall be enforced. Any such written notice must be delivered by a nationally recognized overnight courier with delivery confirmed to the address of each party identified hereinabove.
3. This contract may be canceled with cause by Contractor upon thirty (90) days written notice. It is agreed that Contractor will not cancel contract or suspend services due to nonpayment of services during the time that Contractor has been properly served with notice of alleged deficiencies and it is within the time approved (15) working days) to remedy the alleged deficiencies.
4. Given that the contract value is pro-rated equally over a (12) month period, but the performance of services and associated cost is not incurred equally, the billing monthly amounts may not necessarily reflect the actual value of services performed. Therefore, in the event this contract is terminated, either party may seek recourse to reconcile the value of services performed with the value of services paid for.

Exhibit C

Specifications for CDD Landscaping Contract

CUT SCHEDULE

1. Eighteen (17) cuts of all Bahia grass in and adjacent to all 7 ponds up to resident property lines and to the streets at each end of ponds 20, 120 and 130 (i.e. all blue areas in Exhibit B). Making one 4 to 5 foot cut on the conservancy side of pond 50C and cutting all Bahia grass adjacent to the walking path up to property lines and up to the retaining wall on the south side of Ponds 50A, B and Cis required. Cutting up to retaining wall on pond 60 is also required.
2. Cuts of all CDD owned areas of Bahia grass in and adjacent to the 7 CDD ponds South of Wilson Lake Pkwy (excluding the West end of pond 50C after the end of retaining wall to be cut by the HOA landscaping contractor):

Approximately bi-weekly from May through October	12 cuts
Approximately once a month November through April	<u>5 cuts</u>
Total	17 cuts

1. The Cutting schedule must be provided to the Chairman and District Manager at least one month in advance specifying ponds to be cut and approximate timing of the cuts

WEED CONTROL

1. Weeds beside the concrete walkway or in the expansion joints of the walkway around pond 50 require 4 weed control applications per year. Contractor recommended spraying of individual weeds must be approved in advance and billed separately.

EDGING

1. Pond 50 walkway must be edged at least monthly during the April to October growing season and bi-monthly in the November to March non growing season.
2. Once a year in November or December edge around each ground level pond inlet, including the 3 inlets in pond 70 on the north side of Wilson Lake Pkwy.
3. Pond 70 North of Wilson Lake Pkwy is never to be cut.

STRING TRIM

1. Once a year string trim around all above ground inlets in the ponds.
2. The edging/trimming keeps grass from growing over the grates and impeding the outflow of storm water. There are 26 grated inlets with about 1/3 above ground and 2/3 at ground level requiring once a year trimming/edging.

AGREEMENT EXECUTION

The undersigned parties warrant that they are authorized representatives of their respective companies and have the requisite authority to bind their employer and/or principal to the terms of this Agreement. Executed and delivered as of the date set forth below.

CONTRACT SERVICES	Visits	Billing Type	Season Price
Secondary Area Mow (Retention/Easements) Services	17	Per Season	\$47,219.98

Total (All Contract Services) \$47,219.98

The total price of all seasonal services is \$47,219.98 collected in 12 payments of \$3,935.00 per payment .

CONTRACT PAYMENT SUMMARY

Contract Start Date July 16, 2026

PO #

Contract End Date July 15, 2027

Contract #

01-Jul-2026	Monthly Contract Services [July - 2026]	\$3,935.00
01-Aug-2026	Monthly Contract Services [August - 2026]	\$3,935.00
01-Sep-2026	Monthly Contract Services [September - 2026]	\$3,935.00
01-Oct-2026	Monthly Contract Services [October - 2026]	\$3,935.00
01-Nov-2026	Monthly Contract Services [November - 2026]	\$3,935.00
01-Dec-2026	Monthly Contract Services [December - 2026]	\$3,935.00
01-Jan-2027	Monthly Contract Services [January - 2027]	\$3,935.00
01-Feb-2027	Monthly Contract Services [February - 2027]	\$3,935.00
01-Mar-2027	Monthly Contract Services [March - 2027]	\$3,935.00
01-Apr-2027	Monthly Contract Services [April - 2027]	\$3,935.00
01-May-2027	Monthly Contract Services [May - 2027]	\$3,935.00
01-Jun-2027	Monthly Contract Services [June - 2027]	\$3,934.98

Estimate authorized by:



Estimate approved by: _____

Nathanael White

Signature Date:

03/18/2026

Signature Date: _____

Email:

nwhite@contourslandscape.com