Rizzetta & Company

# Connerton East
# Community Development District

## Board of Supervisors' Meeting

## September 8, 2026

**District Office:**
**5844 Old Pasco Road Suite 100**
**Wesley Chapel, FL 33544**
**813.533.2950**

**Connertoneastcdd.org**

# CONNERTON EAST
# COMMUNITY DEVELOPMENT DISTRICT

Hilton Garden Inn Tampa Suncoast Parkway located at 2155 Northpointe Parkway, Lutz, FL 33558

www.connertoneastcdd.org

**District Board of Supervisors**

| | | |
|---|---|---|
| | Kelly Evans | Chair |
| | Lori Campagna | Vice Chair |
| | Bradley Gilley | Assistant Secretary |
| | Jacob Walsh | Assistant Secretary |
| | Momo Bautista | Assistant Secretary |
| **District Manager** | Jayna Cooper | Rizzetta & Company, Inc. |
| **District Counsel** | John Vericker | Straley, Robin & Vericker |
| **District Engineer** | Brian Surak | Clearview Land Design |

**All Cellular phones and pagers must be turned off while in the meeting room.**

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

Pursuant to provisions of the Americans with Disabilities Act, any person requiring special accommodations to participate in this meeting/hearing/workshop is asked to advise the District Office at least forty-eight (48) hours before the meeting/hearing/workshop by contacting the District Manager at (813) 933-5571. If you are hearing or speech impaired, please contact the Florida Relay Service by dialing 7-1-1, or 1-800-955-8771 (TTY) 1-800-955-8770 (Voice), who can aid you in contacting the District Office.

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

# CONNERTON EAST COMMUNITY DEVELOPMENT DISTRICT

District Office – Wesley Chapel, Florida (813) 994-1001
Mailing Address – 3434 Colwell Avenue Suite 200, Tampa, Florida 33614
Connertoneastcdd.org

September 2, 2026

**Board of Supervisors**
**Connerton East Community**
**Development District**

**REVISED AGENDA**

Dear Board Members:

The regular Meeting of the Board of Supervisors of the Connerton East Community Development District will be held on Tuesday, September 8, 2026 at 9:00 a.m., at the Hilton Garden Inn Tampa Suncoast Parkway 2155 Northpointe Parkway Lutz, FL 33558. The following is the agenda for the meeting:

**BOS MEETING:**

**1. CALL TO ORDER**

**2. AUDIENCE COMMENTS ON AGENDA ITEMS**

**3. BUSINESS ADMINISTRATION**

A. Consideration of Regular Board of Supervisors Meeting Minutes for August 11, 2026 ..... Tab 1

B. Ratification of Operation & Maintenance Expenditures for July 2026 ..... Tab 2

**4. BUSINESS ITEMS**

A. Consideration of FY 27 Brown & Brown Insurance Proposal ..... Tab 3

B. Presentation of Arbitrage Rebate Report for Connerton East Series 2025 AA2 ..... Tab 4

**5. STAFF REPORTS**

A. District Counsel

B. District Engineer

C. Monthly Lighting Report ..... Tab 5

D. Aquatic Report ..... Tab 6

E. Community Asset Management Report ..... Tab 7

i. Contractor Response to Jul 2026 Community Asset Management Report ..... Tab 8

ii. Consideration of Proposal for Runaway Breeze Cul-de-sac ..... Tab 9

F. District Manager Report ..... Tab 10

**6. SUPERVISOR REQUESTS**
**7. ADJOURNMENT**

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

Sincerely,
*Jayna Cooper*
Jayna Cooper
District Manager

# Tab 1

## MINUTES OF MEETING

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

## CONNERTON EAST COMMUNITY DEVELOPMENT DISTRICT

The regular Meeting of the Board of Supervisors of Connerton East Community Development District was held on **Tuesday, August 11, 2026, at 9:00 a.m.** at the Hilton Garden Inn Tampa Suncoast Parkway 2155 Northpointe Lutz, FL 33558.

Present and constituting a quorum:

| | |
|---|---|
| Kelly Evans | **Chairman** *(joined the meeting at 9:14 a.m.)* |
| Lori Campagna | **Vice-Chairman** |
| Bradley Gilley | **Assistant Secretary** |
| Jake Walsh | **Assistant Secretary** |
| Momo Bautista | **Assistant Secretary** |

Also present were:

| | |
|---|---|
| Scott Brizendine | **District Manager, Rizzetta & Company, Inc.** *(via phone)* |
| Jayna Cooper | **District Manager, Rizzetta & Company, Inc.** |
| John Vericker | **District Counsel, Straley, Robin Vericker** |
| Kathryn Hopkinson | **District Counsel, Straley, Robin Vericker** |
| Brian Surak | **District Engineer, Clearview Land Design** *(via phone)* |
| John Toborg | **Landscape Inspection Specialist, Rizzetta & Company, Inc.** |
| Audience | **None** |

**FIRST ORDER OF BUSINESS** **Call to Order**

Ms. Cooper called the meeting to order at 9:00 a.m. confirming a quorum for the meeting.

**SECOND ORDER OF BUSINESS** **Audience Comments on Agenda Items**

No audience members were present.

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**THIRD ORDER OF BUSINESS** **Consideration of Regular Board of Supervisors Meeting Minutes for July 14, 2026**

> On a Motion by Mr. Gilley, seconded by Mr. Walsh, with all in favor, the Board of Supervisors approved minutes of the regular Board of Supervisors meeting on July 14, 2026, for the Connerton East Community Development District.

**FOURTH ORDER OF BUSINESS** **Ratification of Operation & Maintenance Expenditures for June 2026**

> On a Motion by Ms. Campagna, seconded by Ms. Bautista, with all in favor, the Board of Supervisors ratified the operation and maintenance expenditures for June 2026 ($171,782.83), for the Connerton East Community Development District.

**FIFTH ORDER OF BUSINESS** **Ratification of Fiscal Year 2024-2025 Financial Audit**

> On a Motion by Ms. Campagna, seconded by Ms. Bautista, with all in favor, the Board of Supervisors ratified the Fiscal Year 2024-2025 Financial Audit, for Connerton East Community Development District.

**SIXTH ORDER OF BUSINESS** **Ratification of Finn Outdoor Proposal for Erosion Restoration**

The work was scheduled for last week but was delayed due to weather and is now scheduled for this week.

> On a Motion by Ms. Campagna, seconded by Mr. Walsh, with all in favor, the Board of Supervisors ratified Finn Outdoor proposal for Erosion Restoration in the amount of $3,900.00, for the Connerton East Community Development District.

**SEVENTH ORDER OF BUSINESS** **Ratification of Irrigation Proposals for Centralus**

> On a Motion by Ms. Campagna, seconded by Mr. Walsh, with all in favor, the Board of Supervisors ratified Centralus irrigation proposals, for the Connerton East Community Development District.

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**EIGHTH ORDER OF BUSINESS** **Consideration of First Addendum to the Contract for Professional District Services with Rizzetta**

> On a Motion by Ms. Campagna, seconded by Ms. Bautista, with all in favor, the Board of Supervisors approved Rizzetta & Company, Inc., First Addendum to the Contract for Professional District Services, for the Connerton East Community Development District.

**NINTH ORDER OF BUSINESS** **Consideration of Goals & Objectives for Fiscal Year 2025-2026**

> On a Motion by Ms. Campagna, seconded by Ms. Bautista, with all in favor, the Board of Supervisors approved Goals & Objectives for Fiscal Year 2025-2026, for Connerton East Community Development District.

**TENTH ORDER OF BUSINESS** **STAFF REPORTS**

**A. District Counsel**
No report.

**B. District Engineer**
No report. Mr. Surak reviewed the maintenance exhibit and noted that Berry Patch cul-de-sac needs green circle and the path needs to be marked as green.

**C. Monthly Lighting Report**
The Board reviewed the inspection report. Bellflower repair is complete and they are working on Wild Haven.

**D. Aquatic Report**
The Board reviewed the report. There were no questions or concerns at this time.

**E. Community Asset Report**
Mr. Toborg presented this report to the Board.

**i. Presentation of Steadfast Contractor Response Report**

Item #6 – concrete was put there to help stabilize the slope and will be covered when the repair is complete. No need to remove.

**F. District Manager**
The next meeting will be on September 8, 2026, at 5:00 p.m. at the Hilton Garden Inn Tampa Suncoast Parkway 2155 Northpointe Parkway Lutz, Florida 33558.

Ms. Cooper presented the 2nd quarterly website audit compliance report.

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Ms. Cooper presented a resident request for "No Motorized Vehicle" sign at Stonybrook Cabin at both ends of the trail (currently only at one end). No formal Board action was taken.

> On a Motion by Ms. Campagna, seconded by Ms. Evans, with all in favor, the Board of Supervisors approved rescheduling September 8, 2026, meeting from 5:00 p.m. to 9:00 am., for Connerton East Community Development District.

**ELEVENTH ORDER OF BUSINESS** **Supervisor Requests**

Ms. Evans welcomed Ms. Cooper to the team.

**TWELFTH ORDER OF BUSINESS** **Adjournment**

> On a motion from Ms. Evans, seconded by Ms. Bautista, the Board adjourned the meeting at 9:20 a.m. for the Connerton East Community Development District.

| | |
|---|---|
| Assistant Secretary/Secretary | Chairman / Vice-Chairman |

DRAFT

# Tab 2

# CONNERTON EAST COMMUNITY DEVELOPMENT DISTRICT

District Office · Wesley Chapel, Florida · (904) 436-6270
Mailing Address – 3434 Colwell Avenue, Suite 200, Tampa, Florida 33614

**Operation and Maintenance Expenditures**
**July 2026**
**For Board Approval**

Attached please find the check register listing the Operation and Maintenance expenditures paid from July 1, 2026 through July 31, 2026. This does not include expenditures previously approved by the Board.

The total items being presented: **$110,256.76**

Approval of Expenditures:

_____

_____ Chairperson

_____ Vice Chairperson

_____ Assistant Secretary

# Connerton East Community Development District

Paid Operation & Maintenance Expenditures

July 1, 2026 Through July 31, 2026

| Vendor Name | Check # | Invoice Number | Invoice Description | Invoice Amount |
|---|---|---|---|---|
| Bradley Gilley | 20260715-2 | BG051226 | Board of Supervisors Meeting 05/12/26 | $ 184.70 |
| Bradley Gilley | 20260715-1 | BG060926 | Board of Supervisors Meeting 06/09/26 | $ 184.70 |
| Carlos Morcuende | 100690 | 563-070926 | Reimburse for Car towing 07/26 | $ 219.00 |
| Clearview Land Design, P.L. | 100691 | 26-31634 | Engineering Services 6/26 | $ 4,015.41 |
| Coastal Mechanical Inc. | 100695 | 2310 | Lighting repair 07/26 | $ 790.00 |
| Jacob Walsh | 100686 | JW060926 | Board of Supervisors Meeting 06/09/26 | $ 184.70 |
| Jacob Walsh | 20260731-1 | JW071426 | Board of Supervisors Meeting 07/14/26 | $ 184.70 |
| Jayman Enterprises, LLC | 100694 | 4602 | Signage and Pole 06/26 | $ 550.00 |
| Jayman Enterprises, LLC | 100694 | 4638 | Light inspection 06/26 | $ 1,500.00 |
| Jayman Enterprises, LLC | 100694 | 4640 | Dog Park Maintenance 07/26 | $ 3,250.00 |
| Kelly Evans | 20260728-2 | KE071426 | Board of Supervisors Meeting 07/14/26 | $ 184.70 |
| Lori Campagna | 20260703-1 | LC060926 | Board of Supervisors Meeting 06/09/26 | $ 184.70 |
| Morgana Anselmi Bautista | 100687 | MB060926 | Board of Supervisors Meeting 06/09/26 | $ 184.70 |
| Morgana Anselmi Bautista | 20260728-1 | MB071426 | Board of Supervisors Meeting 07/14/26 | $ 184.70 |

# Connerton East Community Development District

Paid Operation & Maintenance Expenditures

July 1, 2026 Through July 31, 2026

| Vendor Name | Check # | Invoice Number | Invoice Description | Invoice Amount |
|---|---|---|---|---|
| Pasco County Utilities | 20260727-1 | 24758901 | 22020 Nebula Way Reclaim D 06/26 | $ 247.45 |
| Pasco County Utilities | 20260727-1 | 24758902 | 22416 Pleasant Morning Dr Reclaim A 06/26 | $ 269.67 |
| Pasco County Utilities | 20260727-1 | 24758903 | 21989 Connerton Boulevard Reclaim 06/26 | $ 138.37 |
| Pasco County Utilities | 20260727-1 | 24758904 | 8363 Flying Fish Ct Reclaim B 06/26 | $ 22.22 |
| Pasco County Utilities | 20260727-1 | 24759594 | 22629 Pleasant Plains Parkway 06/26 | $ 270.68 |
| Pasco County Utilities | 20260727-1 | 24759694 | 22228 Tucana Way Reclaim C 06/26 | $ 12.12 |
| Pinnacle Holdings - XIV, LLC | 100693 | 072226 Pinnacle Holdings | 8/11/2026 BOS Meeting 07/26 | $ 203.33 |
| Rizzetta & Company, Inc. | 100688 | INV0000110632 | District Management Services 07/26 | $ 9,186.91 |
| Steadfast Contractors Alliance, LLC | 100689 | SA-23851 | Landscape Maintenance 06/26 | $ 52,542.10 |
| Steadfast Contractors Alliance, LLC | 100696 | SA-24795 | Irrigation Repairs 06/26 | $ 328.35 |
| Steadfast Contractors Alliance, LLC | 100689 | SA-25418 | Landscape maintenance addendum 04/26-06/26 | $ 24,999.99 |
| Straley Robin Vericker | 100692 | 28679 | Legal Services 06/26 | $ 2,853.25 |
| Times Publishing Company | 100685 | 92762-061726 | Legal Advertising 06/26 | $ 834.00 |
| Times Publishing Company | 100685 | 92767-062426 | Legal Advertising 06/26 | $ 117.20 |

# Connerton East Community Development District

Paid Operation & Maintenance Expenditures

July 1, 2026 Through July 31, 2026

| Vendor Name | Check # | Invoice Number | Invoice Description | Invoice Amount |
|---|---|---|---|---|
| Withlacoochee River Electric Cooperative, Inc. | 20260724-1 | 2221915-070726 | 10129 CAMPANULA CT 06/26 | $ 5,184.77 |
| Withlacoochee River Electric Cooperative, Inc. | 20260724-1 | 2243217-070726 | 9639 Flourish Drive 06/26 | $ 42.55 |
| Withlacoochee River Electric Cooperative, Inc. | 20260724-1 | 2259463-070726 | 21561 Violet Periwinkle Drive 06/26 | $ 40.85 |
| Withlacoochee River Electric Cooperative, Inc. | 20260724-1 | 2262941-070726 | 8658 Little Bluestem Drive 06/26 | $ 43.80 |
| Withlacoochee River Electric Cooperative, Inc. | 20260724-1 | 2262944-070726 | 9033 Little Bluestem Drive 06/26 | $ 46.76 |
| Withlacoochee River Electric Cooperative, Inc. | 20260724-1 | 2262945-070726 | 9129 Little Bluestem Drive 06/26 | $ 40.16 |
| Withlacoochee River Electric Cooperative, Inc. | 20260724-1 | 2262949-070726 | 22024 Storybook Cabin Way 06/26 | $ 40.16 |
| Withlacoochee River Electric Cooperative, Inc. | 20260724-1 | 2286030-070726 | 10884 Flourish Drive 06/26 | $ 41.64 |
| Withlacoochee River Electric Cooperative, Inc. | 20260724-1 | 2354657-070726 | 9138 Gallantree Place 06/26 | $ 43.35 |
| Withlacoochee River Electric Cooperative, Inc. | 20260724-1 | 2360062-070726 | 22979 Pondered Day Lane 06/26 | $ 50.84 |
| Withlacoochee River Electric Cooperative, Inc. | 20260724-1 | 2360063-070726 | 9188 RUNAWAY BREEZE DR 06/26 | $ 57.22 |
| Withlacoochee River Electric Cooperative, Inc. | 20260724-1 | 2360066-070726 | 9338 RAISED TULIP LN 06/26 | $ 76.51 |
| Withlacoochee River Electric Cooperative, Inc. | 20260724-1 | 2379725-070726 | 8103 Painted Sky PL 06/26 | $ 65.00 |
| Withlacoochee River Electric Cooperative, Inc. | 20260724-1 | 2384097-070726 | 22621 Pleasant Plains Pkwy 06/26 | $ 44.84 |

# Connerton East Community Development District

## Paid Operation & Maintenance Expenditures

July 1, 2026 Through July 31, 2026

| Vendor Name | Check # | Invoice Number | Invoice Description | Invoice Amount |
|---|---|---|---|---|
| Withlacoochee River Electric Cooperative, Inc. | 20260724-1 | 2384099-070726 | 22146 Pleasant Morning Drive 06/26 | $ 125.14 |
| Withlacoochee River Electric Cooperative, Inc. | 20260724-1 | 2384102-070726 | 22020 Nebula Way 06/26 | $ 45.07 |
| Withlacoochee River Electric Cooperative, Inc. | 20260724-1 | 2384103-070726 | 8363 Flying Fish Ct 06/26 | $ 43.72 |
| Withlacoochee River Electric Cooperative, Inc. | 20260724-1 | 2384110-070726 | 8778 Gallantree Place 06/26 | $ 59.57 |
| Withlacoochee River Electric Cooperative, Inc. | 20260724-1 | 2385318-070726 | 22441 Rootstock Alley 06/26 | $ 45.32 |
| Withlacoochee River Electric Cooperative, Inc. | 20260724-1 | 2396735-070726 | 10861 Flourish Drive 06/26 | $ 43.48 |
| Withlacoochee River Electric Cooperative, Inc. | 20260724-1 | 2396736-070726 | 23255 Connerton BLVD 06/26 | $ 48.28 |
| Withlacoochee River Electric Cooperative, Inc. | 20260724-1 | 2407136-070726 | 10173 Flourish Drive 06/26 | $ 108.35 |
| Withlacoochee River Electric Cooperative, Inc. | 20260731-2 | 2414931-070726 | 22217 Pleasant morning Drive 06/26 | $ 91.73 |
| **Report Total** | | | | **$ 110,256.76** |

# Tab 3

Brown & Brown

PUBLIC SECTOR

# Insurance Proposal

## October 1, 2026 – October 1, 2027

CONNERTON EAST COMMUNITY DEVELOPMENT DISTRICT



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## Our Story



The Brown & Brown, Public Sector team is a highly-specialized unit of insurance advisors 100% trained to deliver industry-leading services to public entities in the State of Florida. Since 1992, we have continuously refined that specialization and enhanced our services, while becoming the largest public entity brokerage in Florida. Our team provides Property & Casualty and Employee Benefits services to governments from Key West to the Panhandle and represents more than 200 clients.

We have built our reputation by empowering our governmental clients to outperform their industry peers, lower their cost of risk, and enhance their insurance programs - all while staying within their annual budgetary constraints. Our team is committed to serve those who serve the public – and provide superior service to our clients, their staff, and their employees.

- Dedicated service team working exclusively for Florida local governments in all capacities surrounding risk and human resources
- Access to highly experienced public entity resources including Claims Team, Panel Counsel, Loss Control, Disaster Planning and Recovery, and Risk Management Specialists.
- Only retail office in Florida 100% committed to Florida's public entities
- Brown & Brown, Public Sector currently represents over 200 of Florida's governmental entities
    - 22 Counties
    - 70 Cities
    - 20 Public Airports
    - 7 Public School Districts
    - State of Florida

**This proposal is intended to give a brief overview. Higher limits may be available. Please refer to coverage forms for complete details regarding definition of terms, exclusions and limitations.**

**Connerton East**
**Community Development District**

Brown & Brown

# An Introduction to Your Service Team

| Account Executives | | |
|---|---|---|
| **Matt Montgomery**<br>Executive Vice President | (386) 239-7245 | Matt.Montgomery@bbrown.com |
| **Michelle Martin, CIC**<br>Senior Vice President / Public Risk Advisor | (386) 239-4047 | Michelle.Martin@bbrown.com |
| **Stephen Scullian, CPCU, ARM**<br>Senior Vice President / Insurance Broker | (386) 239-7211 | Stephen.Scullian@bbrown.com |
| **Justin Anselmo, CRIS**<br>Senior Vice President / Insurance Broker | (386) 239-8821 | Justin.Anselmo@bbrown.com |
| **Tiffany Hill, GBDS**<br>Vice President / Client Services Leader | (386) 281-6846 | Tiffany.Hill@bbrown.com |
| **Michelle Perry**<br>Vice President / Business Development | (386) 366-6378 | Michelle.Perry@bbrown.com |
| **Robin Russell, ARM-P, CISR, CSRM**<br>Vice President / Account Executive | (386) 239-4044 | Robin.Russell@bbrown.com |
| **Kyle Stoekel, ARM-P, CIC, CRM**<br>Public Risk Advisor | (386) 944-5805 | Kyle.Stoekel@bbrown.com |
| **Bill Wilson**<br>Public Risk Advisor | (386) 333-6058 | Bill.Wilson@bbrown.com |
| **Devyn Donley**<br>Public Risk Advisor | (386) 239-4070 | Devyn.Donley@bbrown.com |
| **Ethan Reedy**<br>Insurance Broker | (386) 239-7264 | Ethan.Reedy@bbrown.com |
| **Victoria "Tori" Reedy**<br>Executive Coordinator | (386) 239-4043 | Tori.Reedy@bbrown.com |
| **Service Representatives** | | |
| **Emily Bailey**<br>Public Risk Specialist | (386) 333-6085 | Emily.Bailey@bbrown.com |
| **Melody Blake, ACSR**<br>Senior Public Risk Specialist | (386) 239-4050 | Melody.Blake@bbrown.com |
| **Taylor Brodeur**<br>Public Risk Specialist | (386) 361-5225 | Taylor.Brodeur@bbrown.com |
| **Jessica Conway**<br>Public Risk & Claims Specialist | (386) 333-6001 | Jessica.Conway@bbrown.com |
| **Megan Feinberg**<br>Public Risk Specialist Assistant | (386) 281-6836 | Megan.Feinberg@bbrown.com |
| **Patricia "Trish" Jenkins, CPSR**<br>Senior Public Risk Specialist | (386) 239-4042 | Trish.Jenkins@bbrown.com |
| **Mallory Colucci**<br>Public Risk & Claims Specialist | (386) 800-1164 | Mallory.Colucci@bbrown.com |

***Certificate Requests:*** 179.certificates@bbrown.com
***Claim Reporting:*** 179.claims@bbrown.com

***Our Service Team philosophy focuses on accountability at all levels of account management. Our goal is not simply to meet your service needs, but to exceed them. All the employees at Brown & Brown are dedicated to achieving this goal and distinguishing ourselves from the competition.***

**This proposal is intended to give a brief overview. Higher limits may be available. Please refer to coverage forms for complete details regarding definition of terms, exclusions and limitations.**

# Preferred Governmental Insurance Trust (*Preferred*) Overview

Several hundred members and millions in premiums prove that the *Preferred* Governmental Insurance Trust® fulfills what Florida needs: an insurance program exclusively customized and dedicated to the public sector. *Preferred* stays on the forefront of specialized insurance for property, casualty and workers' compensation because it is non-profit and self-governed with a membership comprised solely of Florida public entities.

*Preferred*'s history dates back to 1999. Its robust membership and financial strength, including consistent growth of surplus, stem from its conservative platform of managed risk. *Preferred* is just that: ***preferred*** for unmatched public entity experience, innovation, stability and personalized service.

| ***Preferred*'s Member Types** | | |
|---|---|---|
| Municipalities | Counties | Special Districts |
| Public Schools | Charter Schools | Sheriff Departments |
| Housing Authorities | Aviation Authorities | Transit, Port & Utility Authorities |

| ***Preferred*'s Comprehensive Coverages** | | |
|---|---|---|
| Property | Workers' Compensation | General Liability |
| Automobile Liability | Automobile Physical Damage | Law Enforcement Liability |
| Public Officials Liability | Employment Practices Liability | Educators' Legal Liability |

## The Power of Groups and People

What does a specialized insurance trust do for you? In the case of *Preferred*, it gives you the purchasing power of a very large trust with billions of covered property values—far more financial negotiating power than a single public entity can muster. As a *Preferred* member, you are part of a formidable Florida insurance trust.

The trust also transfers risks from any one public entity to the larger group. This provides all members of the trust better rating structures with less volatility. *Preferred*'s sole focus on government ensures that members' unique needs are met.

**This proposal is intended to give a brief overview. Higher limits may be available. Please refer to coverage forms for complete details regarding definition of terms, exclusions and limitations.**

## Underwriting and Administration

Behind *Preferred*'s underwriting platform are decades of success built on integrity and market relationships. Our team of underwriters' vast insurance expertise enhances the actuarial and scientific data used to underwrite individual risks within the trust. Services delivered are both broad and precise. Reliability is assured. The administrator for *Preferred* is Public Risk Underwriters of Florida, Inc.® (PRU), Florida's premier public entity specialist of its kind. *Preferred's* claims administrator is PGCS Claim Services. With more than 25 years in claims experience, PGCS is Florida's foremost governmental third-party administration company.

Public Risk Underwriters of Florida
*Insurance Solutions for Public Entities*

Preferred® PGIT GOVERNMENTAL INSURANCE TRUST

PGCS℠ Claim Services

Underwriting Highlights

- **Diverse risk financing options:** guaranteed cost, deductible, self-insured retention, all lines aggregate
- **Competitive premium discounts** based on favorable experience and sound safety practices
- **Flexibility of coverage design**, including mono-line or package basis
- **Dynamic financial analysis** conducted periodically to validate the trust's superior financial standing

Administration

- **General counsel, defense counsel and litigation services** by specialists in governmental law
- **Membership relations** for networking and professional development
- **Legislative Pulse newsletter** from Tallahassee-based law firm
- **Professional marketing** that guarantees local agent support, governmental knowledge and an ever-growing group of members
- **Preferred News**—a quarterly publication covering the spectrum of government insurance issues
- **State filing, accounting and independent CPA audited financials** as needed

## *Preferred*'s Expert Boards Know Your Business

Preferred is governed and guided by people working daily in all segments of Florida's public sector – from municipalities to counties to schools to special taxing districts.

The Board of Trustees is comprised of elected public officials who work wisely and diligently to set policy, keeping Preferred as the premier public entity insurer of its kind.

**This proposal is intended to give a brief overview. Higher limits may be available. Please refer to coverage forms for complete details regarding definition of terms, exclusions and limitations.**

# *Preferred* Claims Administration

Preferred Governmental Claim Solutions, Inc. ® (PGCS) is the premier governmental third-party claims administrator in the state of Florida and administers the claims for Preferred Governmental Insurance Trust (*Preferred*). Since its founding in 1956, PGCS has provided claims administration services exclusively to over 450 governmental entities including schools, cities, towns, counties, community development districts, and fire districts. Therefore, PGCS's adjusters are extremely qualified to handle governmental tort liability and public sector workers' compensation claims. They are experts at investigating and handling police and firefighters presumption claims. PGCS is sensitive to the politics involved in the handling of public entity claims.

PGCS's claims administration program consists of workers' compensation, general liability, bodily injury, personal injury, property, auto liability, auto physical damage, employment practices liability, school leaders/educators liability and public officials liability. Their claims staff has over 630 years of combined insurance experience and each has been with PGCS an average of 8 years. Claims are handled under strict supervision in accordance with the PGCS workers' compensation and liability claim handling procedure manuals and the PGCS claim best practices manual. A random sampling of each adjuster's claim files are audited on a monthly basis by a Quality Assurance Manager to ensure compliance.

PGCS provides their clients with a dedicated Subrogation Unit to pursue reimbursements from at-fault third parties. Their current recovery rate is fifty-nine (59) percent of the claim costs expended. PGCS also has a dedicated excess reporting and recovery unit for communication to and securing reimbursement from the excess and/or reinsurance carriers. In addition, PGCS provides a state-approved Special Investigation Unit (SIU) to prevent and pursue fraudulent claims. PGCS offers rewards up to $10,000.00 for the arrest and conviction of persons committing workers' compensation fraud. This service is provided via a twenty-four hour seven day a week hotline.

PGCS utilizes the RiskMaster system for claims processing. This system captures a wide variety of data and allows the adjuster to enter an unlimited number of claim notes, process reserve changes, and issue claim payments. Customized reports can be obtained from PGCS's on-line system containing a multitude of data parameters that a client may choose to analyze. The system can be accessed by clients via their website at www.pgcs-tpa.com.

Communication with PGCS's clients is the cornerstone of their claims administration program. Professional adjusters, nurses, management, quarterly in-depth claim review meetings, 24/7 claim reporting, utilization of attorneys specializing in public entity defense, litigation management, and return to work programs are just a sample of how PGCS has set the standard for the industry.

PGCS is committed to partnering with their clients to provide professional and aggressive claim management programs. While they are recognized as the leader in the industry, PGCS is always striving to improve the quality of their programs and expand the services that they offer.

**This proposal is intended to give a brief overview. Higher limits may be available. Please refer to coverage forms for complete details regarding definition of terms, exclusions and limitations.**

# *Preferred* Safety and Risk Management Services

The success of any public sector community is tied to its ability to protect and preserve its human physical assets. This basic premise serves as the cornerstone of an effective Safety Management program and underscores the importance of Safety and Risk Control to the community. *Preferred*'s Safety and Risk Management Department is very aware of the valuable contribution a comprehensive safety and risk control program makes to the bottom-line of any organization.

At *Preferred*, Safety consultations originate with one basic thought—to recommend specific measures to minimize or eliminate the exposures that cause accidents. This does not mean that the workplace become no-risk utopias, but we expect our consultants to recommend measures to control and minimize all types of accidents, injuries and illnesses to our *Preferred* members' operations and premises.

*Preferred* is dedicated to meeting the challenge of the complex issues facing public sector organizations Disarming these issues and converting them into solutions which work to the advantage of our goal. *Preferred*'s approach to risk control incorporates the following elements:

- **Exposure Identification** – Assist management in determining areas where a chance of loss might exist through cause trend analysis, work site evaluations, and facility inspections.

- **Exposure Measurement and Loss Analysis** – Loss analysis and a review of the consequences of the exposures will be considered to develop alternative methods of control.

- **Determination and Selection of Appropriate Risk Control Methods** – Based on measurement and analysis, specific recommendations and/or custom designed risk control plan will be formulated. OSHA, as well as other Agency Standards will be applied and/or used as a "Best Practice" measure when designing and formulating safety and risk control plans.

- **Training and Safety Management Consulting** – After considering client needs specific services and/or training will be formulated and initiated to fit the client's need. Key Personnel or specialty consulting services with the knowledge and skills needed to meet those identified needs will be provided.

- **Additional Consulting Services Available** – *Preferred's* Safety & Risk Management has other services available that may benefit our clients. These services include security evaluations and review of existing safety and risk programs.

*Preferred*'s Safety and Risk Management Department evaluates the unique needs to each client, ultimately designing a program that is capable of being integrated into the overall safety and risk control efforts of each client. *Preferred*'s dedication to the problem-solving approach is the foundation of their Safety and Risk Management Service.

**This proposal is intended to give a brief overview. Higher limits may be available. Please refer to coverage forms for complete details regarding definition of terms, exclusions and limitations.**

# Property – Inland Marine

Term: October 1, 2026 to October 1, 2027

Company: Preferred Governmental Insurance Trust (*Preferred*)

| Covered Property (Per Schedule Provided) | |
|---|---|
| $1,155,061 | Blanket Value Buildings and Contents |

| Special Property Coverages | |
|---|---|
| $1,000,000 | Flood |
| $1,000,000 | Earth Movement |
| Not Included | TRIA Terrorism |

| Inland Marine (Per Schedule Provided) | |
|---|---|
| $100,000 | Blanket Unscheduled Inland Marine*** |
| Included in Blanket | Communication Equipment*** |
| Included in Blanket | Contractor's / Mobile Equipment*** |
| Included in Blanket | Electronic Data Processing Equipment*** |
| Included in Blanket | Emergency Portable Service Equipment*** |
| Included in Blanket | Fine Arts*** |
| $1,468,500 | Other Inland Marine |
| Not Included | Rented, Leased or Borrowed Equipment♦♦ |
| Included in Blanket | Valuable Papers |
| Not Included | Watercraft, Not Including Hull Coverage** |

Deductibles: $2,500 per Occurrence – Buildings and Contents, Earth Movement

5% of TIV per Occurrence / Per Location for "Named Storm" subject to minimum of $10,000 Per Occurrence. Location is defined by each itemized listing on the applicable schedule. Also applies to Inland Marine.

$2,500 any one occurrence for Flood, except:
Excess of maximum NFIP available whether purchased or not or 5% of the TIV at each affected location whichever is greater for Zones A & V

$1,000 per Occurrence – Inland Marine

***Unscheduled items are subject to a maximum value of $25,000 or less per item. Items valued above this amount must be scheduled.**

****Watercraft, not exceeding 25 feet, coverage is not hull coverage. Limited to Specified Perils only, excluding collision with another object.**

**♦♦Unscheduled items are subject to a maximum value of $250,000 or less per item, subject to the maximum per occurrence loss limit shown on the Inland Marine Schedule. Items valued above $250,000 must be scheduled.**

**This proposal is intended to give a brief overview. Higher limits may be available. Please refer to coverage forms for complete details regarding definition of terms, exclusions and limitations.**

# Property – Inland Marine

Coverage:

1. Special form (formerly "All Risk"), subject to policy exclusions.
2. Replacement Cost applies to Buildings, Contents and EDP is subject to all terms and conditions of the coverage agreement the most we will pay for all loss, damage or costs in any one occurrence is the applicable limits of liability shown in the property declaration. **The blanket limit of coverage shown in the property declaration applies to all covered property unless a separate limit, lower limit or reduced amount of coverage is indicated elsewhere in the coverage agreement or in the property declaration.**
3. Inland Marine coverage paid at "Agreed Value" if the valuation type on the Inland Marine schedule is shown as agreed value; or the lesser of Actual Cash Value or 110% of the value reported on the schedule**.** See policy for complete details.
4. *Preferred* will pay for covered loss to your real property, inland marine or personal property:
    a. At the location shown on the Schedule of the Declarations,
    **b. Property in the open within 1,000 feet of locations described in a. above,**
    c. With respects to Inland Marine, at or away from your covered location.
5. No Coinsurance Clause.
6. Certain coverages subject to sub-limits stated in policy.
7. During the current Coverage Agreement period, *Preferred* will not charge an additional premium for **new locations** if the value of a **new location** or total value of all **new locations** at the same physical address that are acquired or newly constructed during the coverage agreement period **is less than $15,000,000** and if the location is acquired after the inception date of the Coverage Agreement. If the newly added location was owned or acquired prior to the inception date of the Coverage Agreement then premium is due at the time the location is added.
8. The *Preferred* Property Program is a shared limit. The limits purchased are a per occurrence limit and in the event an occurrence exhaust the limit purchased by *Preferred* on behalf of the members, payment to you for a covered loss will be reduced pro-rata based on the amounts of covered loss by all members affected by the occurrence.
9. ***Preferred* will be appraising all property currently scheduled. At time of finalization of appraisal, building values are to be adjusted accordingly or Stated Value endorsement will be applied with immediate effect. In addition, trending will be provided every 3 years to ensure adequate Replacement values are insured.**

# Property – Inland Marine

| Sublimits of Coverage<br>Sublimits apply as part of, and not in addition to, the overall Total Insured Values coverage limit. | |
|---|---|
| $1,000,000 | Accounts Receivable, per occurrence |
| $1,000,000 | Additional Expense |
| $40,000 | Animals, annual aggregate |
| $1,000,000 | Business Income |
| $500,000, or 25% of loss whichever is greater | Debris Removal, per occurrence |
| $1,000,000 | Demolition Cost, Ordinance & Increased Cost of Construction, per occurrence |
| $500,000 | Errors and Omissions, per occurrence |
| $250,000 | Expediting Expense, per occurrence |
| $50,000 | Fire Department Charges, per occurrence |
| $250,000 | Fungus Cleanup Expense, annual aggregate |
| $1,000,000 | Golf Course Tees to Greens |
| $50,000 Per Occurrence<br>$1,000 Max per Tree | Lawns, Plants, Trees and Shrubs, Excludes Wind (see policy form for additional restrictions) |
| $4,000,000 | New Locations, per occurrence – 60 days from the date new location(s) is first purchased, rented or occupied, whichever is earlier. See policy for details. |
| $250,000 | Personal Property of Employees, per occurrence |
| $250,000 | Pollution Cleanup Expense, annual aggregate |
| $500,000 | Preservation of Property, per occurrence |
| $50,000 | Professional Fees, per occurrence |
| $250,000 | Property at Miscellaneous Unnamed Locations |
| $25,000 | Recertification, per occurrence |
| $250,000 | Service Interruption Coverage, per occurrence |
| $500,000 | Transit, per occurrence |
| $1,000,000 | Track and Fields |

**This proposal is intended to give a brief overview. Higher limits may be available. Please refer to coverage forms for complete details regarding definition of terms, exclusions and limitations.**

# Property – Inland Marine
# Major Exclusions

Property **Not** Covered includes but not limited to:

1. Animals, water, land including land on which the property is located, shrubs, trees, lawns, growing crops, or standing timber, except under conditions described in the "Extensions of Coverage" section of the policy.
2. Aircraft.
3. Property you sold under conditional sale, trust agreement, installment payment, or other deferred payment plan after such property has been delivered to the customer.
4. Caves, caverns, mines or any type, or any property contained within them.
5. Currency, money, notes or securities.
6. Dams, dikes or levees.
7. Contraband or property in the course of illegal transportation or trade.
8. Property covered under import or export ocean cargo policies.
9. Property you transport as a common carrier.
10. Property shipped by mail, unless sent registered or certified.
11. **Watercraft unless loss is from a specified peril and scheduled on the inland marine schedule.**
12. Vehicles licensed or designed for highway use, unless shown on the Property Declaration, Extensions of Coverage item U, and then no coverage for any **over the road coverage**, or collision with another vehicle or object. The AOP deductible applies per occurrence and in the event of a Named Storm the Named Storm deductible applies per vehicle rather than per location. This coverage is paid at actual cash value at time of loss.
13. Bulkheads, docks, piers, wharves, retaining walls, boardwalks or underwater conduits from: freezing and thawing; impact of watercraft; waves, or debris driven by waves; pressure or weight of ice or water, whether driven by wind or not; or sinking or settling.
14. Dune walkovers, unless loss is at a covered location and from a specified peril other than collapse. **No wind coverage is afforded for dune walkovers.**
15. Electrical or communication lines, towers, and poles you own that are not located on a "covered location" insured under this policy.
16. Personal property of volunteers.
17. Underground pipes, unless loss is from a specified peril.
18. If building has been vacant for more than 90 consecutive days before a loss or damage, the following perils will be excluded: Vandalism, Sprinkler leakage, unless the system has been protected against freezing, building glass breakage, water damage, theft or attempted theft.
19. Loss or damage to any portion of the roof, roof surfacing, awnings, or covered walkways that alters only the appearance of any portion of the roof, roof coverings, awnings or covered walkways (including but not limited to marring, pitting, scratches, or dents) but does not result in damage that allows the penetration of water through the roof covering or result in the failure of the roof covering to perform its intended function to keep out elements over an extended period of time. Roof coverings means shingles, tiles, cladding, metal or synthetic sheeting or similar materials covering the roof, and includes all materials used in securing the roof surface and all materials applied to or used under the roof surface for moisture protection.

# Property – Inland Marine
# Major Exclusions

Excluded Risks of Direct Physical Loss include but not limited to:

1. War, invasion, acts of foreign enemies, hostilities or war like operations, civil war, rebellion, revolution, insurrection, civil commotion, military, usurped power, or any act of terrorism
2. Biological or Chemical Materials
3. Electronic Data or Electronic Date Recognition Exclusion
4. Asbestos
5. Damage caused by electronic currents artificially generated.
6. Pollution, except as provided under "Extensions of Coverage"
7. Building ordinance enforcement or Government action
8. Nuclear reaction
9. Utility failure
10. Fungus, except as provided under "Extensions of Coverage"
11. Any offshore oil well or oil shipping/tanker incident and the ensuing oil spill

**"Named Storm"** Definition: "…*the direct action of wind**, including wind driven water and storm surge** when associated with or occurring in conjunction with a storm or weather disturbance which is named*…" Wind driven water and storm surge loss are NOT subject to Flood Sublimit and are included to the blanket limits.

Flood coverage in zones A or V, or within a 100 Year Flood Plain as designated by the United States Army Corps of Engineers, will have a special flood deductible equal to all flood insurance available for such property under the NFIP, whether purchased or not or 5% of the Total Insured Value at each affected location whichever is greater. If such property is not eligible for the National Flood Insurance Program because the community in which the property is located does not participate in the NFIP, the Special Flood Deductible will be $1,000,000 per insured location damaged in the flood occurrence or 5% of the Total Insured Value at each affected location whichever is greater.

Flood zones A will include, but not be limited to all the sub-classifications of AO, AH, AE, AR, A1 through A99, or any other sub-classification with the A prefix or designation. Flood zones V will include, but not be limited to all the sub-classifications of VO, VH, VE, VR V1 through V99, or any other sub-classification with the V prefix or designation. See policy form for special deductible restrictions.

**This proposal is intended to give a brief overview. Higher limits may be available. Please refer to coverage forms for complete details regarding definition of terms, exclusions and limitations.**

# Equipment Breakdown

Term: October 1, 2026 to October 1, 2027

Company: Preferred Governmental Insurance Trust (*Preferred*)

Covered Equipment: Covered Property built to operate under vacuum or pressure, other than weight of contents, or used for the generation, transmission or utilization of energy.

| Coverage | Limit |
|---|---|
| Property Damage / Loss of Business Income / Additional Expense per accident | $1,155,061 |
| Water Damage | $1,000,000 |
| Ammonia Contamination | $1,000,000 |
| Hazardous Substance Coverage | $1,000,000 |
| Utility Interruption (24 Hour Waiting Period) | $2,000,000 |
| Spoilage Damage | $250,000 |
| Ordinance or Law | $1,000,000 |
| Expediting Expenses | $1,000,000 |
| Data or Media | $250,000 |
| Fungus, Wet Rot, Dry Rot | $15,000 |

Deductibles: Same as Property – Building and Contents
24 Hours – Utility Interruption

**This proposal is intended to give a brief overview. Higher limits may be available. Please refer to coverage forms for complete details regarding definition of terms, exclusions and limitations.**

# General Liability

Term: October 1, 2026 to October 1, 2027

Company: Preferred Governmental Insurance Trust (*Preferred*)

Form: Occurrence

| Coverage | Limit | Deductible |
|---|---|---|
| **General Liability** | | |
| Bodily Injury and Property Damage, per Occurrence | $1,000,000 | $0 Per Occurrence |
| Personal Injury and Advertising Injury, per Person/Occurrence | Included | |
| Products/Completed Operations, Aggregate | Included | |
| Fire Damage, per Occurrence | Included | |
| Medical Payments | $5,000 | |
| Employee Benefits Liability, per Occurrence | $1,000,000 | |
| **Sublimits** | | |
| Vicarious Law Enforcement Liability, per Occurrence | $1,000,000 | Same as General Liability |
| Principle of Eminent Domain Including Inverse Condemnation, "Bert J. Harris, Jr., Private Property Rights Protection Act" per Occurrence / Annual Aggregate. | $100,000 | |
| Sewer Backup and Water Damage:<br>Non-Negligent Claims<br>Negligent Claims. | <br>$10,000/$200,000<br>$200,000/$200,000 | |
| Herbicide and Pesticide, per Occurrence | $1,000,000 | |

Additional Coverages Included:

1. EMT/Paramedic Professional Services
2. Premises Operations
3. "Insured" Contracts
4. Host Liquor Liability
5. Broad Form Property Damage Subject to $2,500 Personal Property of Others Sublimit
6. Watercraft Liability (under 52 feet). See policy form for limitations
7. Limited Worldwide Coverage
8. Failure to Supply Water
9. Communicable Disease (Correctional Facilities and Health Care Facilities - $300,000 Limit)

Notes of Importance:

1. Premium is not audited.
2. Defense Costs are paid in addition to policy limits.
3. In the event an occurrence, accident or offense continues beyond the policy period, the applicable deductible would apply separately to each policy period in which the occurrence, accident or offense was committed or was alleged to have been committed.
4. Limits of Liability are subject to Florida Statute 768.28.
5. Deductible does not apply to claims expense.

**This proposal is intended to give a brief overview. Higher limits may be available. Please refer to coverage forms for complete details regarding definition of terms, exclusions and limitations.**

# General Liability

Exclusions, include but not limited to:

- Expected or intended injury
- Contractual Liability
- Liquor Liability
- Workers' Compensation and similar laws
- Employer's Liability
- Pollution
- Aircraft, Auto or Watercraft
- Mobile Equipment
- War
- Damage to Your Property, Product or Work
- Damage to Impaired Property or Property Not Physically Injured
- Recall of Products, Work or Impaired Property
- Racketeering
- Law Enforcement, except for vicarious liability arising out of an act or omission by a law enforcement agency that is not owned, operated or controlled by the "Covered party" if there is a contract with an outside agency to provide law enforcement for your entity.
- Asbestos, Mold, Fungi, or Bacteria
- Liability arising out of or caused or contributed to by any ownership, maintenance, operation, use, loading, unloading or control of or responsibility for any airfield, airport, aircraft, runway, hangar, building or other property or facility designed for, used, connected, associated or affiliated with or in any way related to aviation or aviation activities; this exclusion does not apply to premises exposure for those common areas open to the public including but not limited to parking areas, sidewalks, and terminal buildings.
- Failure or inability to supply or any interruption of any adequate quantity of power, steam, pressure, or fuel
- Subsidence, erosion or earth movement.
- Hospital / Clinic Medical Malpractice or Health Care Facilities
- Professional Health Care Services, but not including emergency medical services for first aid performed by emergency medical technicians, paramedics or Medical Director while in the course and scope of their duties.
- ERISA
- Actual or alleged illegal discrimination
- Injunctive, declaratory or equitable relief
- Actual or alleged deterioration, bursting breaking, leaking, inadequacy, design of, control of, maintenance of, or any other alleged responsibility for any structure device, or water course, natural or man-made, including, but not limited to: dams, reservoirs, levees, banks, embankments, gates, canals, ditches, gutters, sewers, aqueducts, channels, culvert, retaining walls, drains, tanks, watershed, or drains, a purpose of which is the containing, carrying, impeding, channeling, diverting, or draining of water or other liquid. Does not apply only as to the bursting or failure of man-made sewer, storm water, grey water or potable water supply pipes owned and maintained by Covered Party.
- Sexual abuse after initial discovery
- Perflouroalkyl and Polyflouroalkyl group of manufactured chemicals including, but not limited to the PFAS sub-groups: perfluorooctane sulfonate (PFOS), perfluorooctanoic acid (PFOA), and Perfluorohexane sulfonate acids (PFHxS).

# Deadly Weapon Protection

Term: October 1, 2026 to October 1, 2027

Company: Preferred Governmental Insurance Trust (*Preferred*)

Form: Claims Made

| Deadly Weapon Protection – Claims Made<br>Retroactive Date: 5/18/2026 | | |
|---|---|---|
| **Coverage** | **Limit** | **Deductible** |
| Deadly Weapon Event (Including Claims Expenses), per event | $1,000,000 | $0<br>Per Event |
| **Deadly Weapon Protection – Sublimits** | | |
| Business Interruption | Included | $0<br>Per Event |
| Demolition, Clearance, and Memorialization, per event | $250,000 | |
| Extra Expense, per event | $250,000 | |
| Crisis Management | Included | |
| Property Damage Extension, per event | Included | |
| Counseling Services, per event | $250,000 | |
| Funeral Expenses, per event | $250,000 | |
| Claims Expenses | Included | |
| Medical Expense, per person | $25,000 | |
| Accidental Death & Dismemberment, per person | $50,000 | |

Notes of Importance:

1. **Coverage limited to scheduled locations only.**
2. Premium is not audited.
3. Defense Costs are paid within the policy limits.
4. Deductible does not apply to claims expense.

**Any Event that occurs at a Location which has been specifically leased or loaned by the District to any other entity or individual to host a permitted event planned and ticketed for more than 15,000 attendees over the duration of the event, MUST BE reported to AND APPROVED by *Preferred* PRIOR to event. The Trust may, at their discretion, charge an additional premium and/or impose additional conditions specifically for that event.**

**This proposal is intended to give a brief overview. Higher limits may be available. Please refer to coverage forms for complete details regarding definition of terms, exclusions and limitations.**

# Deadly Weapon Protection

Exclusions include but are not limited to:

- Loss of market, income or use at the property physically lost or physically damaged.
- Confiscation, nationalization, requisition, destruction or damage to property by any authority.
- Criminal, dishonest, fraudulent or malicious conduct by the Covered Party.
- Negligent act, error, omission, misstatement, misleading statement, neglect or breach of duty by the Directors or Officers
- Euthanasia.
- Vehicle not defined as a Road Vehicle;
- Weapon mounted (or designed to be mounted) on a vehicle;
- Weapon, device or substance delivered by an airborne weapon delivery system including, but not limited to, fixed wing aircraft, helicopter or drone.
- Injury or death to employees of the Covered Party, except for Crisis Management Services, Counselling Services, and Funeral Expenses endorsed by Extension to this Coverage Agreement.
- Claim or Claims made by, or on behalf of, any Assailant(s).
- Use or operation, as a means for inflicting harm, of any computer, computer system, computer software program, malicious code, computer virus or process or any other electronic system.
- Nuclear, Chemical, Biological, Bio-Chemical, Electromagnetic or Radioactive Weapons.
- Mental injury or mental anguish related claim where no actual Bodily Injury has occurred to the claimant.
- Covered Party's recklessness or deliberate misconduct.
- Mercy Killing(s).
- Covered Party except for employee while they are a recipient of Business Services being provided by the Covered Party.
- Pollutant or Contaminant.
- Goods or products designed, manufactured, constructed, altered, repaired, serviced, treated, sold, supplied or distributed by the Covered Party.
- Property Damage in respect of property:
    - owned, leased, rented or occupied by the Covered Party.
    - in the care, custody or control of the Covered Party or the care, custody or control of any person under contract with the Covered Party.
- Punitive or exemplary damages, sanctions or any additional damages resulting from the multiplication of compensatory damages.
- Strikes, labor unrest, riots or civil commotion.
- Suicide.
- War, invasion, acts of foreign enemies, hostilities or warlike operations, civil war, rebellion, revolution, insurrection, civil commotion assuming the proportions of, or amounting to, an uprising, military power.
- Swatting and any other fictitious event of hoax.

# Deadly Weapon Protection

Claims Made Policy:
When a policy is on a claims-made basis, coverage triggers based on the actual filing date or receipt of the claim, in addition to the date of loss or injury. It handles any insured loss or claim filed during the policy period, regardless of when the actual loss or injury occurred, subject to the retroactive date on the declarations. Claims-made coverage applies only to covered losses that occur after the retroactive date.

Extended Reporting Periods:
*Preferred* provides the following Extended Reporting Periods options in the event coverage is cancelled or non-renewed:

**Automatic Extended Reporting Period** – continued coverage granted for a period of 90 days following the effective date of termination or nonrenewal, but only for Claims first made during the 90 days and arising from Wrongful Acts taking place prior to the effective date of the termination or nonrenewal.

# Public Officials Liability/Employment Practices Liability

Term: October 1, 2026 to October 1, 2027

Company: Preferred Governmental Insurance Trust (*Preferred*)

Form: **POL/EPLI:** Claims Made – Duty to Defend

| Coverage | Limit | Deductible |
|---|---|---|
| **Public Officials Liability**<br>Retroactive Date: Full Prior Acts | | |
| Per Claim | $1,000,000 | $0<br>Per Claim |
| **Employment Practices Liability**<br>Retroactive Date: Full Prior Acts | | |
| Per Claim | $1,000,000 | $0<br>Per Claim |
| **Sublimits** | | |
| Employee Pre-Termination Legal Consultation Services<br>Per Employee<br>Aggregate | <br>$2,500<br>$5,000 | |
| Non-Monetary Claims Defense Costs, Aggregate | $100,000 | |

Notes of Importance:

1. Defense Costs are paid in addition to policy limits.
2. Deductible does not apply to claims expense.
3. Broadened definition of “Who is an Insured.”
4. Limits of Liability are subject to Florida Statute 768.28.

**This proposal is intended to give a brief overview. Higher limits may be available. Please refer to coverage forms for complete details regarding definition of terms, exclusions and limitations.**

# Public Officials Liability/Employment Practices Liability

Exclusions, include but not limited to:

- Criminal Acts
- Non-Monetary relief except as provided in the Supplementary Payments
- Bodily Injury, Personal Injury, Property Damage, Advertising Injury
- Damages arising out of Inverse Condemnation, Eminent Domain, Temporary or Permanent taking, Adverse Possession, Dedication by adverse Use, Condemnation Proceedings, or claims brought under Florida Statute 70.001 the "Bert J. Harris Jr., Private Property Rights Protection Act" or any similar claim by whatever named called.
- War, Invasion, Acts of foreign enemies, hostiles or warlike operations, strike, lock-out, riot, civil war, rebellion, revolution, insurrection or civil commotion
- Failure to effect and maintain insurance
- Fiduciary Liability
- Pollution
- Workers' Compensation, Employers Liability and similar laws
- Nuclear
- ERISA of 1974, any similar state or local laws, and any rules and regulations promulgated thereunder and amendments thereto.
- Infringement of copyright, trademark, plagiarism, piracy or misappropriation of any ideas or other intellectual property
- Contractual Liability
- Health Care Professional or Health Care Facilities
- Prior and Pending claims
- Workers' Adjustment and Retraining Notification Act, OSHA, RICO, or ADA
- Law Enforcement Activities
- Insured vs. Insured
- Bonds, Taxes or Construction contracts
- Collective Bargaining Agreements
- Capital Improvement to make property more accessible or accommodating to disabled persons
- Punitive Damages
- Return or improper assessment of taxes, assessments, penalties, fines, fees
- Activities of any attorney-at-law, medical personnel, architect, engineer or accountant, in the scope of their professional duties, except for claims made against them as Public Officials or Employees
- Media Wrongful Act
- Access or Disclosure of Confidential or Personal Information and Data-related Liability
- Perflouroalkyl and Polyflouroalkyl group of manufactured chemicals including, but not limited to the PFAS sub-groups: perfluorooctane sulfonate (PFOS), perfluorooctanoic acid (PFOA), and Perfluorohexane sulfonate acids (PFHxS).

# Public Officials Liability/Employment Practices Liability

Claims Made Policy:

When a policy is on a claims-made basis, coverage triggers based on the actual filing date or receipt of the claim, in addition to the date of loss or injury. It handles any insured loss or claim filed during the policy period, regardless of when the actual loss or injury occurred, subject to the retroactive date on the declarations. Claims-made coverage applies only to covered losses that occur after the retroactive date.

Extended Reporting Periods:

*Preferred* provides the following Extended Reporting Periods options in the event coverage is cancelled or non-renewed:

**Automatic Extended Reporting Period** – continued coverage granted for a period of 60 days following the effective date of termination or nonrenewal, but only for Claims first made during the 60 days and arising from Wrongful Acts taking place prior to the effective date of the termination or nonrenewal.

**Optional Extended Reporting Period** – The Public Entity shall have the right, upon payment of up to 200% of the expiring premium, to purchase an Optional Extended Reporting Period, for the period of 12 months following the effective date of the cancellation or nonrenewal, but only for Claims first made during the Optional Extended Reporting Period and arising from Wrongful Acts taking place prior to the effective date of the termination or nonrenewal.

# Cyber Liability

Term: October 1, 2026 to October 1, 2027

Company: Preferred Governmental Insurance Trust (*Preferred*)

Form: Claims Made – Duty to Defend

| **Cyber Liability**<br>Retroactive Date: 5/18/2026 | | |
|---|---|---|
| **Coverage** | **Limit** | **Deductible** |
| **Policy Limit – Annual Aggregate** | **$2,000,000** | **Per Below** |
| **Third Party Liability Coverage** | | |
| Privacy & Security Liability, each claim | $2,000,000 | $25,000 |
| Media Content Services Liability, each claim | $2,000,000 | $25,000 |
| PCI DSS, sublimit | $1,000,000 | $25,000 |
| **First Party Liability Coverage** | | |
| Cyber Extortion & Ransomware, each claim | $500,000 | $25,000 |
| Data Breach & Crisis Management, each claim | $2,000,000 | $25,000 |
| Data Recovery, each claim | $2,000,000 | $25,000 |
| Business Interruption / Extra Expense, each claim | $2,000,000 | $25,000/12 Hr. |
| **Cyber Crime, refer to form for sublimits – Annual Aggregate**<br>Social Engineering Financial Fraud*<br>Funds Transfer Fraud<br>Invoice Manipulation | **$500,000**<br>$500,000<br>$500,000<br>$500,000 | $25,000<br>$25,000<br>$25,000<br>$25,000 |
| **Utility Fraud, refer to form for sublimits – Annual Aggregate**<br>Crypto Jacking<br>Telecommunications Fraud | **$500,000**<br>$500,000<br>$500,000 | $25,000<br>$25,000<br>$25,000 |
| System Failure – BI/EE, sublimit | $2,000,000 | $25,000/12 Hr. |
| Dependent Business Interruption – System Failure, BI/EE, sublimit | $2,000,000 | $25,000/12 Hr. |
| Bricking Coverage, sublimit | $1,000,000 | $25,000 |
| Consequential Reputation Loss<br>Period of Restoration | $1,000,000<br>6 Months | 14 Days |

*Social Engineering Financial Fraud – Coverage shall only apply if you verify the instruction to transfer money or securities by following a pre-arranged callback or other established procedural method to authenticate the validity or the request prior to acting upon any transfer instructions.

# Cyber Liability

Notes of Importance:

1. Defense Costs are included in the policy limits.
2. Deductible does apply to claims expense.

Exclusions, include but not limited to:

- Deliberate Acts / Personal Profit
- Prior Acts
- Bodily Injury / Property Damage
- Employment Practices
- Ownership
- Covered Party vs. Covered Party
- ERISA/Securities
- Pollution
- Contractual except when assumed under contract
- Guarantees
- Advertising
- Business Practice
- Patent
- Privacy
- Governmental Action
- Software Responsibility
- Act of God
- Recover of Profits, Royalties and Fees
- RICO
- Trade Secrets
- War
- Infrastructure Failure electrical, mechanical, Internet, telecommunication, cable or satellite failure, fluctuation or outage not under the operational control of the Insured, however caused, including any electrical power interruption, short circuit, surge, brownout or blackout, however this exclusion shall not apply to a telecommunications fraud event.
- Governmental Orders any court order or damaged requiring the Covered Party to provide law enforcement, any administrative, regulatory or judicial body or any other governmental authority access to personally identifiable information, protected health information, or confidential business information.
- Over-Redemption price discounts, prizes, awards, coupons, or any other valuable consideration given in excess of the contracted or expected amount.
- Perflouroalkyl and Polyflouroalkyl group of manufactured chemicals including, but not limited to the PFAS sub-groups: perfluorooctane sulfonate (PFOS), perfluorooctanoic acid (PFOA), and Perfluorohexane sulfonate acids (PFHxS).

**This proposal is intended to give a brief overview. Higher limits may be available. Please refer to coverage forms for complete details regarding definition of terms, exclusions and limitations.**

# Cyber Liability

Claims Made Policy:

When a policy is on a claims-made basis, coverage triggers based on the actual filing date or receipt of the claim, in addition to the date of loss or injury. It handles any insured loss or claim filed during the policy period, regardless of when the actual loss or injury occurred, subject to the retroactive date on the declarations. Claims-made coverage applies only to covered losses that occur after the retroactive date.

Extended Reporting Periods:

*Preferred* provides the following Extended Reporting Periods options in the event coverage is cancelled or non-renewed:

**Automatic Extended Reporting Period** – continued coverage granted for a period of 60 days following the effective date of termination or nonrenewal, but only for Claims first made during the 60 days and arising from Wrongful Acts taking place prior to the effective date of the termination or nonrenewal.

**Optional Extended Reporting Period** – The Covered Party shall have the right to purchase an Optional Extended Reporting Period for up to 6 years following the effective date of the cancellation or nonrenewal, as shown below:

- Option 1 – 100% for 1 Year
- Option 2 – 150% for 2 Years
- Option 3 – 175% for 3 Years
- Option 4 – 250% for 6 Years

but only for Claims first made during the Optional Extended Reporting Period and arising from Wrongful Acts taking place prior to the effective date of the termination or nonrenewal.

# Automobile Liability

Term: October 1, 2026 to October 1, 2027

Company: Preferred Governmental Insurance Trust (*Preferred*)

| Coverage | Limit | Symbol | Deductible |
|---|---|---|---|
| **Automobile Liability** | | | |
| Primary Bodily Injury and Property Damage Liability – Combined Limit | $1,000,000 | 8,9 | $0 Each Accident |
| Personal Injury Protection | Statutory | 5 | $0 Per Person |
| Medical Payments | N/A | N/A | N/A |
| Uninsured Motorist | N/A | N/A | N/A |

Coverage and Notes of Importance:

1. Defense Costs are paid in addition to policy limits.
2. Hired and non-owned liability is included.
3. Premium is based on number of vehicles and subject to adjustment if schedule is changed.
4. Limited Replacement Cost provided for owned and scheduled private passenger vehicle, light truck or sport utility vehicle that is involved in a covered total loss if the vehicle has less than 18,000 miles and is within the first 12 months of being scheduled at the time of the total loss. This coverage does not apply to police vehicles or any other vehicle types already listed.
5. Physical Damage coverage paid at Actual Cash Value or 110% of the value reported on the schedule, whichever is less. Please see policy for complete details.
6. Limits of Liability are subject to Florida Statute 768.28.

**This proposal is intended to give a brief overview. Higher limits may be available. Please refer to coverage forms for complete details regarding definition of terms, exclusions and limitations.**

# Automobile Liability

Description of Covered Auto Designation Symbols:

| SYMBOL | | DESCRIPTION |
|---|---|---|
| **1** | = | ANY "AUTO" |
| **2** | = | ALL OWNED "AUTOS" ONLY. Only those "autos" you own and or lease (and for Liability Coverage any "trailers" you don't own while attached to power units you own). This also includes all those "autos" you acquire ownership of after the coverage agreement begins. |
| **3** | = | OWNED PRIVATE PASSENGER "AUTOS" ONLY. Only the private passenger "autos" you own. This includes those private passenger "autos" you acquire ownership of after the coverage agreement begins. |
| **4** | = | OWNED "AUTOS" OTHER THAN PRIVATE PASSENGER "AUTOS" ONLY. Only those "autos" you own that are not of the private passenger type (and for Liability Coverage any "trailers" you don't own while attached to power units you own). This includes those "autos" not of the private passenger type you acquire ownership of after the coverage agreement begins. |
| **5** | = | OWNED "AUTOS" SUBJECT TO NO-FAULT. Only those "autos" you own and or lease that are required to have No-Fault benefits in the state where they are licensed or principally garaged. This includes those "autos" you acquire ownership of after the coverage agreement begins provided they are required to have No-Fault benefits in the state where they are licensed or principally garaged. |
| **6** | = | OWNED "AUTOS" SUBJECT TO A COMPULSORY UNINSURED MOTORIST LAW. Only those "autos" you own and or lease that because of the law in the state where they are licensed or principally garaged are required to have and cannot reject Uninsured Motorists Coverage. This includes those "autos" you acquire ownership of after the coverage agreement begins provided they are subject to the same state uninsured motorists requirement. |
| **7** | = | SPECIFICALLY DESCRIBED "AUTOS". Only those "autos" described in ITEM THREE of the Declarations for which a premium charge is shown (and for Liability Coverage any "trailers" you don't own while attached to any power unit described in ITEM THREE). |
| **8** | = | HIRED "AUTOS" ONLY. Only those "autos" you hire rent or borrow. This does not include any "auto" you lease, hire, rent, or borrow from any of your employees or partners or members of their households. |
| **9** | = | NONOWNED "AUTOS" ONLY. Only those "autos" you do not own, hire, rent or borrow that are used in connection with your business. This includes "autos" owned by your employees or partners or members of their households but only while used in your business. |

# Workers' Compensation

Term: October 1, 2026 to October 1, 2027

Insurer: Preferred Governmental Insurance Trust (*Preferred*)

| Class Code | Description of Class Code | Estimated Payroll |
|---|---|---|
| 9015 | Building or Property Management – All Other Employees | $13,000 |
| | **Total Payroll** | **$13,000** |
| | Estimated Manual Premium | $334 |
| | Experience Modification | 1.00 |
| | **Estimated Annual Premium** | **$2,000** |

Notes of Importance:

1. The "Estimated Annual Premium" does not include safety program and drug-free workplace credits as per Florida Statute 440.
2. Employer's Limit of Liability is $1,000,000/$1,000,000/$1,000,000.
3. Experience modification factor is subject to verification. This final amount of credit is dependent upon compliance with program requirements.
4. Final premium subject to payroll audit.
5. The expense constant charge has been included.
6. **Payment terms are annual.**

**This proposal is intended to give a brief overview. Higher limits may be available. Please refer to coverage forms for complete details regarding definition of terms, exclusions and limitations.**

**Connerton East**
**Community Development District**

Brown & Brown

# Premium Recapitulation

| | Annual Premium | Check Option Accept | Check Option Reject |
|---|---|---|---|
| ***Preferred* Package** | | | |
| Property including Equipment Breakdown | $7,499.00 | ☐ | ☐ |
| Inland Marine | $3,671.00 | ☐ | ☐ |
| General Liability | $5,006.00 | ☐ | ☐ |
| Deadly Weapon Protection* | Included | | |
| Public Officials / Employment Practices Liability | $2,400.00 | ☐ | ☐ |
| Cyber Liability | $500.00 | ☐ | ☐ |
| Automobile Liability | $600.00 | ☐ | ☐ |
| Package Payment Plan: | Annual | | |

***Deadly Weapon Protection Coverage: Any Event that occurs at a Location which has been specifically leased or loaned by the District to any other entity or individual to host a permitted event planned and ticketed for more than 15,000 attendees over the duration of the event, MUST BE reported to AND APPROVED by *Preferred* PRIOR to event. The Trust may, at their discretion, charge an additional premium and/or impose additional conditions specifically for that event.**

| | | | |
|---|---|---|---|
| **Workers' Compensation** | $2,000.00 | ☐ | ☐ |
| Workers' Compensation Payment Plan: | Annual | | |

**All lines of coverage must be accepted in order to bind coverage with *Preferred*.**

**I authorize Brown & Brown to request the underwriters to bind coverage on the items indicated above and acknowledge receipt of the Compensation and Financial Condition Disclosure(s) provided in this proposal.**

_____ SIGN HERE
(Signature)

_____
(Name & Title)

_____
(Date)

**This proposal is intended to give a brief overview. Higher limits may be available. Please refer to coverage forms for complete details regarding definition of terms, exclusions and limitations.**

**Notes of Importance:**

1. Quotes provided in the proposal are valid until 10/01/2026. After this date terms and conditions are subject to change by the underwriters.

2. *Preferred* is not subject to the Florida Insurance Guaranty Act, in the event it becomes unable to meet its claims payment obligations. However, insured is named on excess of loss policies.

3. Some of the Carriers of the *Preferred* excess of loss policies are issued pursuant to the FL Surplus Lines laws. Entities insured by surplus lines carriers do not have the protection of the FL Insurance Guaranty Act to the extent of any right of recovery for the obligation of an insolvent, unlicensed insurer.

4. Quote is subject to review and acceptance by *Preferred* Board of Trustees.

5. Premiums are subject to change if all lines of coverage quoted are not bound. **Premiums are subject to 25% minimum premium upon binding.**

6. Not all coverages requested may be provided in this quotation.

7. Flood quotes from NFIP may be available. Please advise your agent if you have property located in zones A or V and would like to have separate NFIP quotes.

8. Property values are based on information supplied by you. You should have reviewed your property schedule and as you deem necessary have appraisals done to verify your reported values are accurate based on current market conditions.

9. The Trust requires all Members to maintain valid and current certificates of workers' compensation insurance for all work performed by persons other than its employees.

10. **With the exception of Workers' Compensation, the total premium is due within 30 days of inception. Premium financing can be arranged if needed.**

11. Quote is not bound until written orders to bind are received from the insured and the Trust subsequently accepts the risk.

12. Should signed application reveal differing details/data than original application received, the entire quote/binder is subject to revision and possible retraction.

13. Higher limits of liability may be available. Please consult with your agent.

14. This proposal is based upon exposures to loss made known to Brown & Brown. Any changes in exposures (i.e. new operations, new acquisitions of property or change in liability exposure) need to be promptly reported to us in order that proper coverage may be put into place.

15. **This proposal is intended to give a brief overview. Please refer to coverage agreements for complete information regarding definition of terms, deductibles, sub-limits, restrictions and exclusions that may apply. In the event of any differences, the policy will prevail.**

# Retail Compensation Disclosure

**Compensation:** As a licensed insurance producer/broker/agent, Brown & Brown entities ("we") are generally authorized by our license to confer with insurance purchasers about the benefits, terms and conditions of insurance contracts; to offer advice concerning the substantive benefits of particular insurance contracts; to sell insurance; and to obtain insurance for purchasers. Our role as an insurance producer in any ordinary transaction typically involves one or more of these activities.

We will receive compensation in the form of commission or fees for assistance with the placement, servicing, claims handling, or renewal of your insurance coverages. Commission compensation will be based on the insurance contract you purchase and may vary depending on a number of factors including the insurance contract(s) and the insurer(s) the purchaser selects. In addition to the commissions or fees received by us for assistance with the placement, servicing, claims handling, or renewal of your insurance coverages, other parties, such as excess and surplus lines brokers, wholesale brokers, reinsurance intermediaries, underwriting managers and similar parties, some of which may be owned in whole or in part by Brown & Brown, Inc., may also receive compensation for their role in providing insurance products or services to you pursuant to their separate contracts with insurance or reinsurance carriers. That compensation is derived from your premium payments. Additionally, it is possible that we, or our corporate parents or affiliates, may receive contingent payments or allowances from insurers based on factors which are not customer-specific, such as the performance and/or size of an overall book of business produced with an insurer. We generally do not know if such a contingent payment will be made by a particular insurer, or the amount of any such contingent payments, until the underwriting year is closed. That compensation is partially derived from your premium dollars, after being combined (or "pooled") with the premium dollars of other insureds that have purchased similar types of coverage. We may also receive invitations to programs sponsored and paid for by insurance carriers to inform brokers regarding their products and services, including possible participation in company-sponsored events such as trips, seminars, and advisory council meetings, based upon the total volume of business placed with the carrier you select. We may, on occasion, receive loans or credit from insurance companies. Additionally, in the ordinary course of our business, we may receive and retain interest on premiums you pay from the date we receive them until the date of premiums are remitted to the insurance company or intermediary. In the event that we assist with placement and other details of arranging for the financing of your insurance premium, we may also receive a fee from the premium finance company.

If an intermediary is utilized in the placement of coverage, the intermediary may or may not be owned in whole or part by Brown & Brown, Inc. or its subsidiaries. Brown & Brown entities operate independently and are not required to utilize other companies owned by Brown & Brown, Inc., but routinely do so. In addition to providing access to the insurance company, the Wholesale Insurance Broker/Managing General Agent may provide additional services including, but not limited to: underwriting; loss control; risk placement; coverage review; claims coordination with insurance company; and policy issuance. Compensation paid for those services is derived from your premium payment, which may on average be 15% of the premium you pay for coverage, and may include additional fees charged by the intermediary.

You may obtain information about compensation expected to be received by us based in whole or part on the sale of insurance to you, and (if applicable) compensation expected to be received based in whole or part on any alternative quotes presented to you by us, by requesting such information from us.

Questions and Information Requests. If you have any questions, or require additional information, please contact your Brown & Brown team, or, if you prefer, submit your question or request online at https://www.bbrown.com/us/contact/contact-general/

# *PREFERRED* Compensation Disclosure

We appreciate the opportunity to assist with your insurance needs. Information concerning compensation paid to other entities for this placement and related services appears below. Please do not hesitate to contact us if any additional information is required.

Public Risk Underwriters is owned by Brown & Brown, Inc. Brown & Brown entities operate independently and are not required to utilize other companies owned by Brown & Brown, Inc., but routinely do so.

For the policy year presented herein, your insurance was placed with Preferred Governmental Insurance Trust (*Preferred*). *Preferred* is an independent entity formed by Florida public entities through an Interlocal Agreement for the purpose of providing its members with an array of insurance coverages and services. *Preferred* has contracted with entities owned by Brown & Brown, Inc. to perform various services. As explained below, those Brown & Brown entities are compensated for their services.

*Preferred* has contracted with Public Risk Underwriters (PRU), a company owned by Brown & Brown, Inc., to administer *Preferred*'s operations. The administrative services provided by PRU to *Preferred* include:

- Underwriting
- Coverage review
- Marketing
- Policy Review
- Accounting
- Issuance of *Preferred* Coverage Agreements
- *Preferred* Member Liaison
- Risk Assessment and Control

Pursuant to its contract with *Preferred*, Public Risk Underwriters of Florida, Inc. (PRU) receives an administration fee, based on the size and complexity of the account, up to 9.75% of the *Preferred* premiums billed and collected.

*Preferred* also utilizes wholesale insurance brokers, some of which (such as Peachtree Special Risk Brokers and Apex Insurance Services) are owned by Brown & Brown, Inc., for the placement of *Preferred*'s insurance policies. The wholesale insurance broker may provide the following services to *Preferred*:

- Risk Placement
- Coverage review
- Claims Liaison with Insurance Company
- Policy Review
- Current Market Intelligence

The wholesale insurance broker's compensation is largely dictated by the insurance company. It typically ranges between 5% and 10% of the premiums you pay to *Preferred* for your coverage.

# Notice of Carrier Financial Status

Brown & Brown, Inc., its subsidiaries and affiliates do not certify, warrant or guarantee the financial soundness or stability of any insurance carrier or alternative risk transfer entity. We endeavor to place your coverage with insurance carriers rated "A-" or better by AM Best Company. However, we cannot predict whether a company's financial condition will improve or deteriorate over time.

This notice is provided to allow you to make an informed decision regarding the placement of your insurance. Upon your request, we will attempt to obtain alternative quotes from insurance carriers rated "A-" or better by AM Best Company. Please note the following with regard to the placement of the insurance indicated below and with regard to any subsequent renewal of such insurance:

- Insurance coverage is being quoted with/provided by the Preferred Governmental Insurance Trust ("Preferred"), which is a Florida local government self-insurance fund established pursuant to Section 624.4622, Florida Statutes. The Trust is not rated by the AM Best Company or subject to the protections afforded by any state guaranty fund or association.

- The financial condition of insurance companies and other coverage providers including local government self-insurance funds/trusts may change rapidly and is beyond the control of Brown & Brown.

- You have had an adequate opportunity to make a thorough and complete inquiry into the financial condition and the terms and conditions of membership in Preferred, including reviewing it with your accountants, legal counsel and advisors, and enter into this relationship knowingly, voluntarily and with a full understanding of the risks.

| | |
|---|---|
| **Named Insured:** | Connerton East Community Development District |
| **Line of Coverage(s):** | Property/Equipment Breakdown, Inland Marine, General Liability and Employee Benefits Liability, Public Officials and Employment Practices Liability, Cyber Liability, Automobile Liability , Deadly Weapon, Workers' Compensation |
| **Policy Number(s):** | PK FL1 0514613 26-02 01 & WC FL1 0514613 26-02 |
| **Policy Period(s):** | 10/01/2026 to 10/01/2027 |
| **Date of Notice:** | 8/10/2026 |

*** AM Best Rating Guide: Rating for Stability: A++ to F = Highest to lowest rating**
**Financial Size Category: XV to I - Largest to smallest rating**

| Guide to Bests Ratings | | |
|---|---|---|
| **Best Category** | **Rating** | **Description** |
| Secure | A++ | Superior |
| Secure | A+ | Superior |
| Secure | A | Excellent |
| Secure | A- | Excellent |
| Secure | B++ | Very Good |
| Secure | B+ | Very Good |
| Vulnerable | B | Fair |
| Vulnerable | B- | Fair |
| Vulnerable | C++ | Marginal |
| Vulnerable | C+ | Marginal |
| Vulnerable | C | Weak |
| Vulnerable | C- | Weak |
| Vulnerable | D | Poor |
| Vulnerable | E | Under Regulatory Supervision |
| Vulnerable | F | In Liquidation |
| Vulnerable | S | Rating Suspended |
| Not Rated | NR-1 | Insufficient Data |
| Not Rated | NR-2 | Insufficient Size and/or operating experience |
| Not Rated | NR-3 | Rating Procedure Inapplicable |
| Not Rated | NR-4 | Company Request |
| Not Rated | NR-5 | Not Formally Followed |
| Rating Modifier | u | Under Review |
| Rating Modifier | q | Qualified |
| Affiliation Code | g | Group |
| Affiliation Code | p | Pooled |
| Affiliation Code | r | Reinsured |

| Guide to Best's Financial Size Categories | | |
|---|---|---|
| Reflects size of insurance company based on their capital, surplus and conditional reserve funds in U.S. dollars. | **I** | Less than $1,000,000 |
| | **II** | $1,000,000 - $2,000,000 |
| | **III** | $2,000,000 - $5,000,000 |
| | **IV** | $5,000,000 - $10,000,000 |
| | **V** | $10,000,000 - $25,000,000 |
| | **VI** | $25,000,000 - $50,000,000 |
| | **VII** | $50,000,000 - $100,000,000 |
| | **VIII** | $100,000,000 - $250,000,000 |
| | **IX** | $250,000,000 - $500,000,000 |
| | **X** | $500,000,000 - $750,000,000 |
| | **XI** | $750,000,000 - $1,000,000,000 |
| | **XII** | $1,000,000,000 - $1,250,000,000 |
| | **XIII** | $1,250,000,000 - $1,500,000,000 |
| | **XIV** | $1,500,000,000 - $2,000,000,000 |
| | **XV** | Greater than $2,000,000,000 |

Brown & Brown always strives to place your coverage with highly secure insurance companies. We cannot, however, guarantee the financial stability of any carrier.

Preferred® PGIT GOVERNMENTAL INSURANCE TRUST

Public Entity Application
PO Box 958455
Lake Mary, FL 32795-8455
Phone: 321-832-1450
Fax: 321-832-1496

Public Entity Application
Renewal Application Muni
Coverage Term: 10/01/2026 to 10/01/2027

| General Member Information | |
|---|---|
| Name: Connerton East Community Development District | |
| Mailing: c/o Rizzetta & Company | |
| 3434 Colwell Avenue, Suite 200 | |
| City/State/Zip: Tampa, Florida 33614 | |
| Physical: | |
| | |
| City/State/Zip: , Florida | |
| | |
| **Member Contact Information**<br>Contact: Scott Brizendine | **Additional Member Information**<br>FEIN: NCCI Risk ID: |
| Title: District Manager | Population: 0 |
| Phone#: 813-933-5571 Fax#: | County: Pasco |
| Email: sbrizendine@rizzetta.com | Member Type: Community Development District |
| **Agency Information** | **Agency Contact Information** |
| Agency: Risk Management Associates, Inc. | Contact: Devyn Donley |
| Address: 300 North Beach Street | Phone#: 3862394070 |
| City/State/Zip: Daytona Beach , Florida 32114 | Fax#: |
| Phone#: (386) 252-6176 Fax#: (386) 239-4049 | Email: devyn.donley@bbrown.com |

CERTIFICATION

The undersigned being authorized by and acting on behalf of the applicant and all persons/concerns seeking insurance, has read and understands this Application, including any appendices and/or supplements, and declares that all statements set forth herein are true, complete and accurate. The undersigned acknowledges and agrees that the submission and the Trust's receipt of such written report, prior to the inception of the coverage agreement applied for, is a condition precedent to coverage.

The signing of this Application does not bind the undersigned to purchase the coverage, nor does the review of same bind The Trust to issue a coverage agreement. This application shall be the basis of the contract, should one be issued.

This Application must be signed by the "Ranking Elected/ Appointed Official" of the Entity making the application (e.g. Chair, President, Superintendent or Executive Director of the Educational Entity) or the Risk Manager (or ranking official) assigned this function.

SIGNATURE: _____ SIGN HERE

TITLE: _____

DATE: _____

NOTICE TO APPLICANT

For your protection, the following Fraud Warning is required to appear on this application:

FLORIDA FRAUD STATEMENT

Any person who knowingly and with intent to injure, defraud or deceive any insurer, files a statement of claim or an application containing any false, incomplete or misleading information is guilty of a felony of the third degree.

**Public Entity Application**
**Coverage Term:** 10/01/2026 to 10/01/2027
**Member Name:** Connerton East Community Development District
**Agency:** Risk Management Associates, Inc.

## Coverages Selected:

| | | | |
|---|---|---|---|
| Auto Liability | Y | Auto Physical Damage | N |
| Boiler & Machinery | Y | Crime | N |
| Flood | Y | Garage Keepers | N |
| General Liability | Y | Inland Marine | Y |
| Professional Liability | Y | Property | Y |
| Cyber Liability | Y | | |

## Coverage/Exposure Summary:

| Line of Business | Exposure Coverage | Applicable/Not Applicable |
|---|---|---|
| General Question | Application general Information | |
| General Question | Excess WC (Standards Limits are $1M/$1M/$1M | Not Applicable |
| General Question | SIR – TPA Information | Not Applicable |
| General Question | Stop Loss | Not Applicable |
| Auto Liability | Coverage | Applicable |
| Auto Physical Damage | Coverage | Not Applicable |
| Crime | Coverage | Not Applicable |
| Cyber Liability | Coverage | Applicable |
| Garage Keepers | Coverage | Not Applicable |
| General Liability | Coverage | Applicable |
| General Liability | Operations: Elder Care/Respite Care | Not Applicable |
| General Liability | Operations: Special Events, Fairs or Carnivals | Not Applicable |
| General Liability | Operations: Supervision Abuse Prevention (Required) | Applicable |
| Professional Liability | Law Enforcement | Not Applicable |
| Professional Liability | POL/ELL/EPLI | Applicable |
| Property | Coverage | Applicable |



Initial_____Date_____ INITIAL HERE

**Public Entity Application**
**Coverage Term:** 10/01/2026 to 10/01/2027
**Member Name:** Connerton East Community Development District
**Agency:** Risk Management Associates, Inc.

## APPLICATION GENERAL INFORMATION

| General Questions | Response |
|---|---|
| Account CSR: | Jessica Conway |
| Agent Name: | Devyn Donley |
| Primary Member Contact: | Scott Brizendine |
| If New Primary Contact include name, phone and email address: | |
| Requested Effective Date: | 10/01/2026 |
| Requested Termination Date: | 10/01/2027 |
| Bid Date (if Applicable, Attach RFP copy): | |
| Need by Date: | |
| Is this new business? If it is new business, please complete and attach the 'Expiring Information' form. Template can be found under 'Agent Documents' at the top of the page (Application is not complete without this information). | No |
| Have you been with PGIT less than 5 years? If Yes - complete and attach the 'Loss Summary' form or a 'No Known Losses' letter. Template can be found under 'Agent Documents' at the top of the page (Application is not complete without this information). | Yes |
| Member's FEIN | |
| NCCI Risk Id # | |
| Population | 0 |
| Have you attached the most recent audited financials/budget? | |
| Please Enter Full Detail Description of Operations | |
| Installment Schedule: (Only Available for premium > 100k, pay plan is agency bill) | Annual |
| Do you have a Risk Manager? (If yes, please provide name and number in comment box) | No |
| Do you have a Human Resource or Personnel Department? (If No please describe handling of this function in comment box) | No |
| Number of Full Time Police? | 0 |
| Number of Full Time Fire? | 0 |
| Number of Full Time all other Personnel? | 5 |
| Number of Part Time Police? | 0 |
| Number of Part Time Fire? | 0 |
| Number of Part Time All Other Personnel including Seasonal personnel? | 0 |
| Number of Volunteers Police? | 0 |
| Number of Volunteers Fire? | 0 |
| Number of Volunteers All Others? | 0 |
| Police - Estimated Payroll | $0 |
| Fire - Estimated Payroll | $0 |
| All Other - Estimated Payroll | $13,000 |

INITIAL HERE

Initial_____Date_____

**Public Entity Application**
**Coverage Term:** 10/01/2026 to 10/01/2027
**Member Name:** Connerton East Community Development District
**Agency:** Risk Management Associates, Inc.

**COVERAGE INFORMATION- PROFESSIONAL LIABILITY- PUBLIC OFFICIALS & EMPLOYMENT PRACTICES**

**THIS IS AN APPLICATION FOR "CLAIMS MADE AND REPORTED" COVERAGE**

| POL/EPLI General Questions | Response |
|---|---|
| 1 - POL Limit: | $1,000,000 |
| 2 - POL Deductible: | $0 |
| 3 - EPLI Limit: | $1,000,000 |
| 4 - EPLI Deductible: | $0 |
| 5 - POL Retro Date | |
| 6 - EPLI Retro Date | |
| 7 - If New Business - Who is your current POL/EPLI carrier? | EGIS |
| 8 - If new business - What is your current POL/EPLI Limit? | $1,000,000 |
| 9 - If new business - What is your current POL/EPLI Deductible? | $0 |
| 10 - If new business, is your current coverage claims made or occurrence? | Claims Made |
| 11 - Has your POL/EPLI coverage ever been cancelled or non-renewed? (If yes describe answer in comment box) | No |
| 12 - Total Number of Board Members? | 5 |
| 13 - Are Board members Elected? (Y/N) (If no, describe who they are appointed by in comment box) | No |
| 14 - Number of employees who hold professional designations | 0 |
| 15 - Has any bond issue been defeated within the past three years? | No |
| 16 - If yes, has the proposal been resubmitted or is it expected to be resubmitted? | No |
| 17 - Has the public entity been in default on the principal or interest on any bond? (if yes, please provide details in comment box) | No |
| 18 - Do you have a zoning commission? (Y/N) | No |
| 19 - Does your legal counsel attend all meetings of the planning and zoning board? | Yes |
| 20 - Do officials receive training with respect to open meetings and hearing regulations? | Yes |
| 21 - Do you have a written master plan for economic development? (If yes, please select the year) | |
| 22 - Do you have formally approved land use ordinances that have been reviewed by legal counsel? | Yes |
| 23 - Do you have a formal procedure to file for a variance to land use statutes? | Yes |
| 24 - Do you have a formal process for application and approval of permits and licenses? | Yes |
| 25 - Do you have a formal written policy prohibiting elected officials and/or board members from sitting on decisions in which they may have a conflict of interest? | Yes |
| 26 - If with Preferred less than 5 years, have you had any disputes or claims involving a wrongful taking, zoning variance or land use right? (If yes, provide details in comment box). Please note providing details here does not qualify as reporting a claim. | No |
| 27 - If with Preferred less than 5 years, have you had any disputes or claims involving the approval of building permits, design, or code enforcement? (If yes, provide details within comment box.) Please note providing details here does not qualify as reporting a claim | No |



Initial_____Date_____ INITIAL HERE

| | |
|---|---|
| 28 - If with Preferred less than 5 years, have you had any disputes, claims, or complaints involving open or closed landfills? (If yes, provide details within the comment box.) | No |
| 29 - Number of employees reported on IRS Form 1099(no FEIN) and/or who have written employment agreements | 0 |
| 30 - Total % of involuntary turnover during the last 3 years (Ex. 2) | 0% |
| 31 - Total % of voluntary turnover during the last 3 years (Ex. 5) | 0% |
| 32 - Average # of years of employment for all employees (Ex. 4) | 0 |
| 33 - Do supervisors receive training in the proper implementation of your policies and procedures? | Yes |
| 34 - Is training documented in their personnel file? | Yes |
| 35 - Enter 4 digit year employment manual written or last updated. | |
| 36 - Is employment manual reviewed by counsel experienced and qualified in employment law? | Yes |
| 37 - Do policies and procedures comply with state and federal guidelines? | Yes |
| 38 - Is this manual distributed to all employees upon hiring? | Yes |
| 39 - Do you have a written policy with respect to both sexual and non-sexual harassment? | Yes |
| 40 - Do you follow a formal written procedure for employee disputes/complaints? | Yes |
| 41 - Are all actions to dismiss or demote employees reviewed in advance by legal counsel? | Yes |
| 42 - Do you require that due process be served and documented for all proceedings involving dismissal, demotion, or suspension? | Yes |
| 43 - Are all probationary or disciplinary actions recorded in writing and signed by the employee? | Yes |
| 44 - Have job descriptions been drafted for regular full-time positions? | Yes |
| 45 - Are you an Equal Opportunity Employer? | Yes |
| 46 - Over the last 5 years has any person made a claim alleging unfair or improper treatment regarding employee hiring, remuneration, advancement, or termination of employment? (If yes, explain in the comment box.). Please note providing details here does not qualify as reporting a claim. | No |
| 47 - Answer if with Preferred less than 5 years. Has any claim been made against the entity or any person in their capacity as an official or employee of the entity? (If yes, explain in the comment box.). Please note providing details here does not qualify as reporting a claim. | No |
| 48 - Does any official or employee have any knowledge of any fact, circumstance or situation which might reasonably be expected to give rise to a claim? (If yes, explain in the comment box.). Please note providing details here does not qualify as reporting a claim. | No |



Initial_____Date_____

INITIAL HERE

**Public Entity Application**
**Coverage Term:** 10/01/2026 to 10/01/2027
**Member Name:** Connerton East Community Development District
**Agency:** Risk Management Associates, Inc.

## COVERAGE INFORMATION - CYBER LIABILITY GENERAL QUESTIONS

**THIS IS AN APPLICATION FOR CLAIMS MADE AND REPORTED COVERAGE**

| Cyber Liability | Response |
|---|---|
| 1 - Cyber Retro Date | 5/18/2026 |
| 2 - Do you have anti-virus software installed and enabled on all desktops and servers (excluding database servers) and is it updated on a regular basis? | Yes |
| 3 - Do you have firewalls installed on all external gateways? | Yes |
| 4 - Do you take regular backups (at least weekly) of all critical data? | Yes |
| 5 - If confidential information is stored on laptops, flash drives and other mobile devices, is the information stored in an encrypted format? | No |
| 6 - Is data "at rest" (servers, etc.) stored in an encrypted format? | No |
| 7 - Is multi-factor authentication required for all employees when accessing email through a website or cloud based service? | Yes |
| 8 - Is multi-factor authentication required for all remote access to the network provided to employees, contractors, and 3rd party service providers? | Yes |
| IN ADDITION TO REMOTE ACCESS, IS MULTI-FACTOR AUTHENTICATION REQUIRED FOR THE FOLLOWING, INCLUDING ACCESS PROVIDED TO 3RD PARTY SERVICE PROVIDERS: | |
| 9 - All internal and remote admin access to directory services | Yes |
| 10 - All internal and remote admin access to network backup environments | Yes |
| 11 - All internal and remote admin access to network infrastructure | Yes |
| 12 - All internal and remote admin access to the organization's endpoints/servers | Yes |
| 13 - Have you suffered a claim or loss in the last five years, in relation to cyber liability or cyber security? If yes, describe: | No |
| 14 - Are you aware of any circumstances or complaints against you in relation to data protection or security, PII (Personally Identifiable Information), PHI (Protected Health Information) or any other actual or potential security violations or breaches either currently or in the past five years? If so, please describe (Please note providing details here does not qualify as reporting a claim) | No |



Initial_____Date_____ INITIAL HERE

PROFESSIONAL LIABILITY- POL/EPLI/ CYBER

IT IS AGREED THAT IF ANY SUCH FACT, CIRCUMSTANCE OR SITUATION NOT LISTED/DISCLOSED HEREIN, THEN ANY CLAIM BASED UPON, ARISING OUT OF, OR ATTRIBUTABLE THERETO, IS EXCLUDED FROM THE COVERAGE BEING APPLIED FOR.

The undersigned, being authorized by and acting on behalf of the applicant and all persons or concerns seeking coverage, has read and understand this Application, and declares all statements set forth herein are true, complete and accurate. The undersigned further declares and represents that any occurrence or event taking place prior to the inception of the coverage agreement applied for, which may render inaccurate, untrue or incomplete any statement made herein will immediately be reported in writing to the Trust. The undersigned acknowledges and agrees that the submission and the Trust's receipt of such written report, prior to the inception of the coverage agreement applied for, is a condition precedent to coverage.

The signing of this Application does not bind the undersigned to purchase coverage, nor does the review of this Application bind Preferred to issue a coverage agreement. This Application shall, however, be the basis of the contract, should a coverage agreement be issued.

Signed_____Title_____Date_____ SIGN HERE

*This Application must be signed by the "Ranking Elected / Appointed Official" of the Entity making the application (e.g. Mayor /Manager / equivalent Officer) or the Risk Manager (or ranking official) assigned this function.*

SIGNATORY ABOVE IS ALSO TO INITIAL EACH AND EVERY PAGE OF THIS APPLICATION.

IMPORTANT NOTICE: SHOULD THE SIGNED APPLICATION DIFFER IN ANY WAY FROM THE APPLICATION SUBMITTED FOR UNDERWRITING/RATING PURPOSES, THE TERMS, CONDITIONS AND PREMIUM AS REFLECTED ON SUBJECT TO CHANGE.



Initial_____Date_____ INITIAL HERE

**Public Entity Application**
**Coverage Term:** 10/01/2026 to 10/01/2027
**Member Name:** Connerton East Community Development District
**Agency:** Risk Management Associates, Inc.

**COVERAGE INFORMATION - Auto Liability**

| Coverage | Response |
|---|---|
| 1 - AL Limit: | $1,000,000 |
| 2 - AL Territory: | Gulf Coast |
| 3 - AL Deductible: | $0 |
| 4 - Medical Payment limit: | |
| 5 - Uninsured/Underinsured motorist limit (Maximum $100,000): | |
| 6 - Hired and Non-Owned Liability? (Y/N) | Y |
| 7 - If symbol 10 for AL is required, provide definition: | |
| 8 - How often do you inspect vehicles for safety hazards? | N/A |
| 9 - Are safety inspection records maintained? | No |
| 10 - Are vehicles assigned to specific drivers with back up drivers? | No |
| 11 - Do you have any busing operations contracted to third parties that is greater than 50% of the overall busing operations? | No |
| 12 - Are 15 passenger vans used for passenger transportation? (If yes, provide Member's policy/procedure with regards to how many passengers are transported in each van, seatbelts, other safety procedures, etc.) | No |
| 13 - Do you own/operate Autonomous Vehicles? If so Autonomous Vehicle Supplemental Application is required.: | No |
| PLEASE ENTER 4 DIGIT YEAR FOR DATE WRITTEN,LAST UPDATED OR "NONE" for the next 5 questions | |
| 14 - Fleet Management Safety Manual: | None |
| 15 - Driver Training Program: | None |
| 16 - MVR Criteria: | None |
| 17 - Formal Written Accident Reporting Procedure: | None |
| 18 - Employee Disciplinary Program for Driver Safety | None |



Initial_____Date_____ INITIAL HERE

**Public Entity Application**
**Coverage Term:** 10/01/2026 to 10/01/2027
**Member Name:** Connerton East Community Development District
**Agency:** Risk Management Associates, Inc.

**COVERAGE INFORMATION - General Liability**

| Coverage | Response |
|---|---|
| 1 - GL Occurrence Limit | $1,000,000 |
| 2 - GL Deductible | $0 |
| 3 - Employee Benefits Occurrence Limit | $1,000,000 |
| 4 - Medical Expense Limit (Max $5,000) | $5,000 |
| 5 - Total number of Housing Authority units | 0 |
| 6 - If Housing Authority, please give number of section 8 units (including USDA units) | 0 |
| 7 - Number of hotel units owned/operated by member | 0 |
| 8 - Do you require all contractors & vendors with whom you do business to provide a contractual hold harmless and certificate of Insurance. | Yes |
| 9 - Do you require groups using your facilities to provide a contractual hold harmless and Certificate of Insurance? | Yes |
| 10 - Do you require groups using your facilities to make you an additional insured on their insurance policy? | Yes |
| 11 - Do you have an ADA coordinator? If so please provide name.: | District Manager |
| 12 - If you are a special district, are you responsible for sidewalk maintenance? | No |
| CHECK YES/ NO FOR EACH OF THE FOLLOWING EXPOSURES | |
| 13 - Athletic Fields & Activities | No |
| 14 - Airports/Aircraft (Coverage limited to Premises Liability Only) | No |
| 15 - Bleachers/Auditoriums/Stadiums | No |
| 16 - Do you sponsor/operate Children/Youth Programs? | No |
| 17 - Do you sponsor/operate Sr. Adult Program? | No |
| 18 - Do you sponsor/operate programs for emotionally/mentally challenged individuals? | No |
| 19 - Electric Power Distribution(Power Generation excluded) | No |
| 20 - EMT's/Paramedics (Incl Fire Dept & Other 1st Responders) | No |
| 21 - Exhibition/Convention Center | No |
| 22 - Gas Utility Distribution (Generation Excluded) | No |
| 23 - Golf Course | No |
| 24 - Hospitals, Nursing Homes, Medical Facilities (Coverage limited to Premises Liability only, Medical Malpractice excluded) | No |
| 25 - Law Enforcement(See Law Enforcement section for coverage questions) | No |
| 26 - Marinas (Premises Liability only excludes Marina Operators Liability) | No |
| 27 - Detention Facilities (See Law Enforcement section for coverage questions) | No |
| 28 - Restaurants/Snack Bars/Food Beverage Carts | No |
| 29 - Skate Parks | No |
| 30 - Swimming Pools/Water Parks/Splash Parks | No |
| 31 - Wastewater Treatment | No |
| 32 - Water Utility | No |
| 33 - Watercraft (Coverage limited to craft less than 52ft excludes paying passengers) | No |
| 34 - Wharves/Piers/Docks (Excluding Marina Ops Liability) | No |



Initial_____Date_____ INITIAL HERE

| | |
|---|---|
| 35 - Drones (if yes, and you are requesting coverage complete the Unmanned Aircraft/Drone supplemental application found in the pool forms and documents) | No |
| 36 – Trampolines, inflatables, or bounce houses? | No |
| | |

**COVERAGE INFORMATION- General Liability**

| Operations: Elder Care/ Respite Care | Response |
|---|---|
| 1 - Number of Elder Care/Respite Care locations | |
| 2 - Ratio of clients to care providers | |

**COVERAGE INFORMATION- General Liability**

| Operations: Special Events, Fairs, or Carnivals | Response |
|---|---|
| 1 - If you have fireworks displays, how many a year do you have? | |
| 2 - Do you contract out the fireworks display to a licensed Pyrotechnician? | |



Initial_____Date_____ INITIAL HERE

**Public Entity Application**
**Coverage Term:** 10/01/2026 to 10/01/2027
**Member Name:** Connerton East Community Development District
**Agency:** Risk Management Associates, Inc.

**COVERAGE INFORMATION- General Liability**

| Supervision Abuse Prevention (Required) | Response |
|---|---|
| 1 - Who in the Entity has been designated to handle claims (include name, address, telephone number and email)? | District Manager |
| 2 - With respect to Claims Incidents, etc., do you have a written procedure for obtaining information? | Yes |
| ENTER YES/NO FOR ALL OPERATIONS LISTED BELOW | |
| 3 – Camps (Residential): (Yes/No) | No |
| 4 - Camps with overnight stays: (Yes/No) | No |
| 5 - Daycare Centers/Nursery Schools - Children or Adult Care: (Yes/No) | No |
| 6 - Juvenile Detention Centers: (Yes/No) | No |
| 7 - Medical Services and Professionals - Doctors, Psychiatrists, Visiting Nurse Services: (Yes/No) | No |
| 8 - Mental Institutions: (Yes/No) | No |
| 9 - Orphans or Foster Homes, including Social Service Agencies responsible for the Foster Home evaluation and/or placement: (Yes/No) | No |
| 10 - Religious/Clergy/Church Organizations | No |
| 11 - Schools - public or private elementary, junior high or high school: (Yes/No) | No |
| 12 - Social Service Counselors - Social Workers, Psychologists: (Yes/No) | No |
| 13 - Special Needs Educational Facilities: (Yes/No) | No |
| 14 - Substance Abuse Facilities with overnight stays: (Yes/No) | No |
| 15 - Substance Abuse Facilities without overnight stays: (Yes/No) | No |
| 16 - Youth Organizations (Sports, Scouts, YMCA/YWCA, Big Brothers/Sisters, etc): (Yes/No) - If yes please specify in Comment field | No |
| 17 - Is there a Sexual Abuse Prevention Program in effect? | No |
| 18 - Has a written policy been established clearly expressing management's commitment to sexual abuse prevention? | No |
| 19 - Have written procedures encompassing rules, a code of conduct and disciplinary measures been established for all staff and/or volunteers, which clearly define the policy and consequences of non-adherence? | No |
| 20 - Has a mechanism been developed to ensure that sexual abuse prevention policies and procedures are implemented and enforced throughout the organization? | No |
| 21 - Is there a Sexual Abuse Prevention Coordinator that reports to a member of management? | Yes |
| 22 - Are management/staff trained in policies and procedures relating to the Sexual Abuse Prevention Program? | Yes |
| 23 - Do policies and procedures include an incident reporting and follow-up mechanism? | Yes |
| 24 - Are standard applications used for all prospective employees or volunteers? | Yes |
| 25 - Is there a minimum of two background checks for prospective employees with documentation maintained in file? | No |
| 26 - Do background checks include checks with "Sex Offender Hot-lines", State Police, State Department of Social Services, or similar public agencies? (where applicable) | No |
| 27 - In the past five years have any employees or officers been terminated for cause related to sexually abusive behavior? | No |



Initial_____Date_____ INITIAL HERE

| | |
|---|---|
| 28 - Are records maintained documenting adherence to all applicable policies and procedures, e.g., hiring and screening, code of conduct, training, incident and follow-up procedures? | Yes |
| 29 - Are you aware of any circumstance that may result in a sexual abuse claim? If Yes,explain in the comment box.(Please note providing details here does not qualify as reporting a claim) | No |
| 30 - Have any members of the staff been transferred because of allegations of sexual abuse? | No |



Initial_____Date_____ INITIAL HERE

**Public Entity Application**
**Coverage Term:** 10/01/2026 to 10/01/2027
**Member Name:** Connerton East Community Development District
**Agency:** Risk Management Associates, Inc.

**COVERAGE INFORMATION - Property**

| Coverage | Response |
|---|---|
| 1 - ISO Protection Class: | 4 |
| 2 - AOP Property Deductible: | $2,500 |
| 3 - Excess Flood Limit (primary for zones other than A & V) - Maximum Limit $5,000,000 | $1,000,000 |
| 4 - Earth movement Limit - Maximum Limit $5,000,000 | $1,000,000 |
| 5 - Equipment Breakdown Coverage requested (Y/N) | Yes |
| 6 - Do any of the buildings have unrepaired damage from a recent loss? If so, please describe the extent of the damage and location. | No |
| 7 - Date of last property valuation: (4 digit year) | |
| 8 - If new business, have you attached a copy of your most recent appraisal? | No |
| 9 - Does the member own any structures not listed on the Property Application Schedule of Locations? If yes, provide description in the comment box. | No |
| 10 - Are these structures insured with another carrier? | No |



Initial_____Date_____ INITIAL HERE

Preferred PGIT GOVERNMENTAL INSURANCE TRUST

**Named Covered Party:** Connerton East Community Development District
**Term:** 10/01/2026 to 10/01/2027
**Coverage Provided by:** Preferred Governmental Insurance Trust
**Quote Number:** PK FL1 0514613 26-02 01

## YOU ARE ELECTING NOT TO PURCHASE CERTAIN VALUABLE COVERAGE WHICH PROTECTS YOU AND YOUR FAMILY OR YOU ARE PURCHASING UNINSURED MOTORISTS LIMITS LESS THAN YOUR BODILY INJURY LIABILITY LIMITS WHEN YOU SIGN THIS FORM. PLEASE READ CAREFULLY.

Uninsured Motorist coverage provides for payment of certain benefits for damages caused by owners or operators of uninsured motor vehicles because of bodily injury or death resulting there from. Such benefits may include payments for certain medical expenses, lost wages, and pain and suffering, subject to limitations and conditions contained in the Coverage Agreement. For the purpose of this coverage, an uninsured motor vehicle may include a motor vehicle as to which the bodily injury limits are less than your damages.

Florida law requires that automobile liability coverage agreements include Uninsured Motorist coverage at limits equal to the Bodily Injury limits in your coverage agreement unless you select a lower limit offered by the Trust or reject Uninsured Motorist entirely. Please indicate whether you desire to entirely reject Uninsured Motorist coverage, or, whether you desire this coverage at limits lower than the Bodily Injury Liability limits of your Coverage Agreement:

[X] a. I hereby reject Uninsured Motorist coverage.

[ ] b. I hereby select the following Uninsured Motorist limits which are lower than my Bodily Injury Liability Limits:
each person (enter limit if applicable):
each accident.

[ ] c. I hereby select Uninsured Motorist coverage limits equal to my Bodily Injury Liability limits. (If you select this option disregard the bold face statement above.)

### ELECTION OF NON-STACKED COVERAGE

(Do not complete if you have rejected Uninsured Motorist)

You have the option to purchase, at a reduced rate, non-stacked (limited) type of Uninsured Motorists coverage. Under this form if injury occurs in a vehicle owned or leased by you or any family member who resides with you, this Coverage Agreement will apply only to the extent of coverage (if any) which applies to that vehicle in this Coverage Agreement. If an injury occurs while occupying someone else's vehicle, or you are struck as a pedestrian, you are entitled to select the highest limits of Uninsured Motorist coverage available on any one vehicle for which you are a Named Covered Party, covered family member, or covered resident of the Named Covered Party's household. This Coverage Agreement will not apply if you select the coverage available under any other Coverage Agreement issued to you or the Coverage Agreement of any other family member who resides with you.

If you do not elect to purchase the non-stacked form, your Coverage Agreement limit(s) for each motor vehicle are added together (stacked) for all covered injuries. Thus, your Coverage Agreement limits would automatically change during the Coverage Agreement term if you increase or decrease the number of autos covered under the Coverage Agreement.

[ ] I hereby elect the non-stacked form of Uninsured Motorist coverage.

I understand and agree that selection of any of the above options applies to my liability Coverage Agreement and future renewals or replacements of such Coverage Agreement which are issued at the same Bodily Injury Liability limits. If I decide to select another option at some future time, I must let the Trust or my agent know in writing.

**Signature** _____ **Title** _____ SIGN HERE

**Name** _____ **Date** _____

The brief description of coverage contained in this document is being provided as an accommodation only and is not intended to cover or describe all Coverage Agreement terms. For more complete and detailed information relating to the scope and limits of coverage, please refer directly to the Coverage Agreement documents. Specimen forms are available upon request.

**Named Covered Party:** Connerton East Community Development District
**Term:** 10/01/2026 to 10/01/2027
**Coverage** Provided by: Preferred Governmental Insurance Trust
**Quote Number:** PK FL1 0514613 26-02 01

# Signature Page

I hereby confirm that the limits/coverages as shown here, corresponding with the Coverage Agreement, are correct:

| | | |
|---|---|---|
| **X** | **Property** | **TIV: $1,155,061 Building and Contents Combined** |
| **X** | **Inland Marine** | **Blanket Unscheduled IM: $100,000**<br>**Scheduled Inland Marine: $1,468,500**<br>**Total All Inland Marine: $1,568,500** |
| **N/A** | **Property TRIA (Terrorism Risk Insurance Act) coverage** | |
| **N/A** | **Crime** | |
| **X** | **General Liability** | **Ratable Payroll: $13,000** |
| **N/A** | **Law Enforcement Liability** | **Officers: Not Included** |
| **X** | **Professional Liability** | **Employees: 5** |
| **X** | **Automobile** | **0 Units - Auto Liability**<br>**0 Units - Comprehensive**<br>**0 Units – Collision** |
| **N/A** | **Stop Loss Aggregate:**<br>**Applies to:** | **Not Included** |
| **N/A** | **Excess Workers' Compensation** | **Payroll: Not Included** |
| **N/A** | **I confirm that I have received a copy of Preferred's Current Interlocal Agreement (last amended October 1, 2004) and Amendment A (effective October 1, 2013).** | |
| **N/A** | **I confirm having read and agreed to the terms as laid out in the attached Preferred Participation Agreement (which also requires a signature).** | |

**A signed copy of the following is also required where applicable: First Page of Preferred Application; Professional Liability Application; Uninsured Motorist Rejection/Election Form; SIR Signature Page.**

SIGN HERE

**Signature** _____ **Title** _____
**Name** _____ **Date** _____

Coverage is provided by Preferred Governmental Insurance Trust

The brief description of coverage contained in this document is being provided as an accommodation only and is not intended to cover or describe all Coverage Agreement terms. For more complete and detailed information relating to the scope and limits of coverage, please refer directly to the Coverage Agreement documents. Specimen forms are available upon request.

Public Entity Application
PO Box 958455
Lake Mary, FL 32795-8455
Phone: 321-832-1450
Fax: 321-832-1496

**Public Entity Application**
**Worker's Compensation 1st$ or Deductible Application**
**Coverage Term:** 10/01/2026 **to** 10/01/2027

| General Member Information | |
|---|---|
| **Name:** | Connerton East Community Development District |
| **Mailing:** | c/o Rizzetta & Company |
| | 3434 Colwell Avenue, Suite 200 |
| **City/State/Zip:** | Tampa, Florida 33614 |
| **Physical:** | 3434 Colwell Avenue |
| | Suite 200 |
| **City/State/Zip:** | Tampa, Florida 33614 |

| Member Contact Information | Additional Member Information |
|---|---|
| **Contact:** Scott Brizendine | **FEIN:** 872536655 **NCCI Risk ID:** |
| **Title:** District Manager | **Population:** 0 |
| **Phone:** 813-933-5571 **Fax:** | **Physical County:** Hillsborough |
| **Email:** sbrizendine@rizzetta.com | **Member Type:** Community Development District |
| **Agency Information** | **Agency Contact Information** |
| Agency: Risk Management Associates, Inc. | Contact: Devyn Donley |
| Address: 300 North Beach Street | Phone#: 3862394070 |
| | Fax#: |
| **City/State/Zip:** : Daytona Beach, FL 32114 | Email: devyn.donley@bbrown.com |
| **Phone:** (386) 252-6176 **Fax:** (386) 239-4049 | |

CERTIFICATION
The undersigned being authorized by and acting on behalf of the applicant and all persons/concerns seeking insurance, has read and understands this Application, including any appendices and/or supplements, and declares that all statements set forth herein are true, complete and accurate. The undersigned acknowledges and agrees that the submission and the Trust's receipt of such written report, prior to the inception of the coverage agreement applied for, is a condition precedent to coverage.

The signing of this Application does not bind the undersigned to purchase the coverage, nor does the review of same bind The Trust to issue a coverage agreement. This application shall be the basis of the contract, should one be issued.

This Application must be signed by the "Ranking Elected/ Appointed Official" of the Entity making the application (e.g. Chair, President, Superintendent or Executive Director of the Educational Entity) or the Risk Manager (or ranking official) assigned this function.

SIGNATURE: _____ SIGN HERE

TITLE: _____

DATE: _____

NOTICE TO APPLICANT
For your protection, the following Fraud Warning is required to appear on this application:

FLORIDA FRAUD STATEMENT
Any person who knowingly and with intent to injure, defraud or deceive any insurer, files a statement of claim or an application containing any false, incomplete or misleading information is guilty of a felony of the third degree.

**Coverage Term:** 10/01/2026 to 10/01/2027

**Member Name:** Connerton East Community Development District

**Agency:** Risk Management Associates, Inc.

Current Coverages Selected:

Workers' Compensation

Coverage/ Exposure Summary:

| Line of Business | Exposure Coverage | Applicable/Not Applicable |
|---|---|---|
| General Question | Application General Information | Applicable |
| Workers' Compensation | 1st Dollar (Standard Limits are $1M/$1M/$1M) | Applicable |

## COVERAGE INFORMATION

| General Questions | Response |
|---|---|
| Account CSR: | Jessica Conway |
| Agent Name: | Devyn Donley |
| Primary Member Contact: | Scott Brizendine |
| If New Primary Contact include name, phone and email address: | |
| Have you attached the most recent audited financials? | |
| Requested Effective Date: | 10/01/2026 |
| Requested Termination Date: | 10/01/2027 |
| Bid Date (if Applicable, Attach RFP copy): | |
| Need by Date: | |
| Is this new business? If it is new business, please complete and attach the 'Expiring Information' form. Template can be found under 'Agent Documents' at the top of the page (Application is not complete without this information). | No |
| Have you been with PGIT less than 5 years? If Yes - complete and attach the 'Loss Summary' form or a 'No Known Losses' letter. Template can be found under 'Agent Documents' at the top of the page (Application is not complete without this information). | Yes |
| Member's FEIN: | 872536655 |
| NCCI Risk ID #: | |
| Population: | 0 |
| Full Detailed Description of Operations: | community development district |
| Installment Schedule (Direct Bill): | Annual |
| Do you have a risk Manager? (Yes/No) If yes, please provide name and phone number | No |
| Do you have a Human Resources or Personnel Department? (Yes/No) If No, please describe handling of this function: | No |
| Number of Full Time Police | 0 |
| Number of Full Time Fire | 0 |
| Number of Full Time All Other Personnel | 5 |
| Number of Part Time Police | 0 |
| Number of Part Time Fire | 0 |
| Number of Part Time All Other Personnel including Seasonal | 0 |
| Number of Volunteers Police | 0 |
| Number of Volunteers Fire | 0 |
| Number of Volunteers All Others | 0 |
| Police - Estimated Payroll | 0 |
| Fire - Estimated Payroll | 0 |
| All Other – Estimated Payroll | 13,000 |

**Coverage Term:** 10/01/2026 to 10/01/2027

**Member Name:** Connerton East Community Development District

**Agency:** Risk Management Associates, Inc.

## COVERAGE INFORMATION - Worker's Compensation

| | 1st Dollar or Deductible | Response |
|---|---|---|
| 1. | Enter number of broken arm posters needed: | 2 |
| 2. | WC Limit Requested (standard is $1M/$1M/$1M): | $1,000,000/$1,000,000/$1,000,000 |
| 3. | WC Deductible Requested: | $0 |
| 4. | Experience Modification Factor: | |
| 5. | Experience Modification Factor Effective Date: | |
| 6. | Is a formal drug free program in operation? Attach Drug Free Credit Application. | No |
| 7. | Is a formal safety program in operation? Attach Safety Credit Application. | No |
| 8. | Is there a formal Return to Work - Light Duty program in place for all operational areas? | Yes |
| 9. | Does employer have a safety committee? | No |
| 10. | If Yes, is there management participation | No |
| 11. | Is there a formal review of all workplace accidents? | Yes |
| 12. | Do past, present, or discontinued operations involve storing, treating, discharging, applying, disposing, or transporting hazardous materials? If yes, describe: | No |
| 13. | Any work performed underground or above 15 feet? If yes, describe: | No |
| 14. | Any work performed on docks, barges, vessels, bridges, or over water? If yes, describe: | No |
| 15. | Are sub-contractors used? If yes, describe: | No |
| 16. | Are Work Comp COI's required for sub-contractors/ vendors? | Yes |
| 17. | Do employees travel out of state? If yes, describe: | No |
| 18. | Do you lease employees to or from other employers? If yes, describe: | No |
| 19. | Any group transportation provided? If yes, describe: | No |
| 20. | Are physicals required after offers of employment are made? If yes, list which departments or positions require physicals. | No |

| | | |
|---|---|---|
| 21. | Are there any occupational disease exposures involved in the operation including asbestos, silica, dust, hazardous chemicals, radiation, communicable disease or any other occupational disease exposure? If Yes, describe: | No |
| 22. | Is there any owned, leased or chartered aircraft? If yes, complete aviation supplemental application. | No |
| 23. | Are there any owned or operated airports? If yes, describe: | No |
| 24. | Is there any owned, leased or chartered watercraft? If yes, describe operation: | No |
| 25. | Any employees who may be subject to the Longshore and Harbor Workers' Compensation Act, Jones Act or Federal Employer's Liability Act? If yes, describe: | No |
| 26. | Do operations include electric utility? If yes, describe: | No |
| 27. | Any power generation? | No |
| 28. | Any power distribution? | No |
| 29. | # Lineman | 0 |
| 30. | Amount of payroll associated with lineman | $0 |
| 31. | Do operations include gas utility? If yes, describe: | No |
| 32. | Do operations include a penal facility? If yes, describe: | No |
| 33. | Do operations include amusement park or similar facility? If yes, describe: | No |

# Tab 4

LLS Tax Solutions Inc.
1645 Sun City Center Plz,
#5027
Sun City Center, FL 33571
Telephone: 850-754-0311
Email: liscott@llstax.com

August 20, 2026

Ms. Shandra Torres
Connerton East Community Development District
c/o Rizzetta & Company, Inc.
3434 Colwell Avenue, Suite 200
Tampa, Florida 33614

**$9,975,000**
**Connerton East Community Development District**
**Special Assessment Bonds, Series 2025**
**(Assessment Area Two)**
**("Bonds")**

Dear Ms. Torres:

Attached you will find our arbitrage rebate report for the above-referenced Bonds for the annual period ended April 15, 2026 ("Computation Period"). This report indicates that there is no cumulative rebate requirement liability as of April 15, 2026.

The next annual arbitrage rebate calculation date is April 15, 2027. If you have any questions or comments, please do not hesitate to contact me at (850) 754-0311 or by email at liscott@llstax.com.

Sincerely,

Linda L. Scott

Linda L. Scott, CPA

cc: Ms. Leanne Duffy, US Bank

# *Connerton East Community Development District*

*$9,975,000 Connerton East Community Development District Special Assessment Bonds, Series 2025 (Assessment Area Two)*

*For the period ended April 15, 2026*

LLS Tax Solutions Inc.
1645 Sun City Center Plz,
#5027
Sun City Center, FL 33571
Telephone: 850-754-0311
Email: liscott@llstax.com

August 20, 2026

Connerton East Community Development District
c/o Rizzetta & Company, Inc.
3434 Colwell Avenue, Suite 200
Tampa, Florida 33614

Re: $9,975,000 Connerton East Community Development District Special Assessment Bonds, Series 2025 (Assessment Area One) ("Bonds")

Connerton East Community Development District ("Client") has requested that we prepare certain computations related to the above-described Bonds for the period ended April 15, 2026 ("Computation Period"). The scope of our engagement consisted of the preparation of computations to determine the Rebate Requirement for the Bonds for the Computation Period as described in Section 148(f) of the Internal Revenue Code of 1986, as amended ("Code"), and this report is not to be used for any other purpose.

In order to prepare these computations, we were provided by the Client with and have relied upon certain closing documents for the Bonds and investment earnings information on the proceeds of the Bonds during the Computation Period. The attached schedule is based upon the aforementioned information provided to us. The assumptions and computational methods we used in the preparation of the schedule are described in the Summary of Notes, Assumptions, Definitions and Source Information. A brief description of the schedule is also attached.

The results of our computations indicate a negative Cumulative Rebate Requirement of $(22,181.16) at April 15, 2026. As such, no amount must be on deposit in the Rebate Fund.

As specified in the Form 8038G, the calculations have been performed based upon a Bond Yield of 5.4908%. Accordingly, we have not recomputed the Bond Yield.

The scope of our engagement was limited to the preparation of a mathematically accurate Rebate Requirement for the Bonds for the Computation Period based on the information provided to us. The Rebate Requirement has been determined as described in the Code, and regulations promulgated thereunder ("Regulations"), as applicable to the Bonds and in effect on the date of this report. We have no obligation to update this report because of events occurring, or information coming to our attention, subsequent to the date of this report.

*LLS Tax Solutions Inc.*

**SUMMARY OF NOTES, ASSUMPTIONS, DEFINITIONS, SOURCE INFORMATION, AND DESCRIPTION OF SCHEDULE**

Connerton East Community Development District
August 20, 2026
$9,975,000 Special Assessment Bonds, Series 2025 (Assessment Area Two)
For the period ended April 15, 2026

**NOTES AND ASSUMPTIONS**

1. The issue date of the Bonds is April 16, 2025.

2. The end of the first Bond Year for the Bonds is April 15, 2026.

3. Computations of yield are based upon a 30-day month, a 360-day year and semiannual compounding.

4. We have assumed that the only funds and accounts relating to the Bonds that are subject to rebate under section 148(f) of the Code are shown in the attached schedule.

5. For investment cash flow purposes, all payments and receipts are assumed to be paid or received, respectively, as shown in the attached schedule. In determining the Rebate Requirement for the Bonds, we have relied on information provided by you without independent verification, and we can therefore express no opinion as to the completeness or suitability of such information for such purposes. In addition, we have undertaken no responsibility to review the tax-exempt status of interest on the Bonds.

6. We have assumed that the purchase and sale prices of all investments as represented to us are at fair market value, exclusive of brokerage commissions, administrative expenses, or similar expenses, and representative of arms' length transactions that did not artificially reduce the Rebate Requirement for the Bonds, and that no "prohibited payments" occurred and no "imputed receipts" are required with respect to the Bonds.

7. Ninety percent (90%) of the Rebate Requirement as of the next "computation date" ("Next Computation Date") is due to the United States Treasury not later than 60 days thereafter ("Next Payment Date"). (An issuer may select any date as a computation date, as long as the first computation date is not later than five years after the issue date, and each subsequent computation date is no more than five years after the previous computation date.) No other payment of rebate is required prior to the Next Payment Date. The Rebate Requirement as of the Next Computation Date will not be the Rebate Requirement reflected herein but will be based on future computations that will include the period ending on the Next Computation Date. If all of the Bonds are retired prior to what would have been the Next Computation Date, one hundred percent (100%) of the unpaid Rebate Requirement computed as of the date of retirement will be due to the United States Treasury not later than 60 days thereafter.

8. For purposes of determining what constitutes an "issue" under section 148(f) of the Code, we have assumed that the Bonds constitute a single issue and are not required to be aggregated with any other bonds.

**SUMMARY OF NOTES, ASSUMPTIONS, DEFINITIONS, SOURCE INFORMATION, AND DESCRIPTION OF SCHEDULE**

Connerton East Community Development District
August 20, 2026
$9,975,000 Special Assessment Bonds, Series 2025 (Assessment Area Two)
For the period ended April 15, 2026

**NOTES AND ASSUMPTIONS (cont'd)**

9. The accrual basis of accounting has been used to calculate earnings on investments. Earnings accrued but not received at the last day of the Computation Period are treated as though received on that day. For investments purchased at a premium or a discount (if any), amortization or accretion is included in the earnings accrued at the last day of the Computation Period. Such amortization or accretion is computed in such a manner as to result in a constant rate of return for such investment. This is equivalent to the "present value" method of valuation that is described in the Regulations.

10. No provision has been made in this report for any debt service fund. Under section 148(f)(4)(A) of the Code, a "bona fide debt service fund" for public purpose bonds issued after November 10, 1988, is not subject to rebate if the average maturity of the issue of bonds is at least five years and the rates of interest on the bonds are fixed at the issue date. It appears and has been assumed that the debt service fund allocable to the Bonds qualifies as a bona fide debt service fund, and that this provision applies to the Bonds.

11. The District issued the Series 2025 Bonds to provide funds to (i) pay a portion of the costs of the acquiring and/or constructing certain public infrastructure (the "Assessment Area Two Project"), (ii) fund the Series 2025 Reserve Account of the Debt Service Reserve Fund in an amount equal to the initial Series 2025 Reserve Requirement for the Series 2025 Bonds, (iii) fund interest on the Series 2025 Bonds through at least June 15, 2025, and (iv) pay costs of issuance of the Series 2025 Bonds.

**SUMMARY OF NOTES, ASSUMPTIONS, DEFINITIONS, SOURCE INFORMATION, AND DESCRIPTION OF SCHEDULE**

Connerton East Community Development District
August 20, 2026
$9,975,000 Special Assessment Bonds, Series 2025 (Assessment Area Two)
For the period ended April 15, 2026

**DEFINITIONS**

1. *Bond Year*: Each one-year period that ends on the day selected by the Client. The first and last Bond Years may be shorter periods.

2. *Bond Yield*: The yield that, when used in computing the present value (at the issue date of the Bonds) of all scheduled payments of principal and interest to be paid over the life of the Bonds, produces an amount equal to the Issue Price.

3. *Allowable Earnings*: The amount that would have been earned if all nonpurpose investments were invested at a rate equal to the Bond Yield, which amount is determined under a future value method described in the Regulations.

4. *Computation Date Credit*: A credit allowed by the Regulations as a reduction to the Rebate Requirement on certain prescribed dates.

5. *Rebate Requirement*: The excess of actual earnings over Allowable Earnings and Computation Date Credits.

6. *Issue Price*: Generally, the initial offering price at which a substantial portion of the Bonds is sold to the public. For this purpose, 10% is a substantial portion.

**SUMMARY OF NOTES, ASSUMPTIONS, DEFINITIONS, SOURCE INFORMATION, AND DESCRIPTION OF SCHEDULE**

Connerton East Community Development District
August 20, 2026
$9,975,000 Special Assessment Bonds, Series 2025 (Assessment Area Two)
For the period ended April 15, 2026

**SOURCE INFORMATION**

| Bonds | Source |
|---|---|
| Closing Date | Form 8038G |
| Bond Yield | Form 8038G |
| **Investments** | **Source** |
| Principal and Interest Receipt Amounts and Dates | Trust Statements |
| Investment Dates and Purchase Prices | Trust Statements |

**SUMMARY OF NOTES, ASSUMPTIONS, DEFINITIONS, SOURCE INFORMATION, AND DESCRIPTION OF SCHEDULE**

Connerton East Community Development District
August 20, 2026
$9,975,000 Special Assessment Bonds, Series 2025 (Assessment Area Two)
For the period ended April 15, 2026

**DESCRIPTION OF SCHEDULE**

**SCHEDULE 1 - REBATE REQUIREMENT CALCULATION**

Schedule 1 sets forth the amount of interest receipts and gains/losses on sales of investments and the calculation of the Rebate Requirement.

$9,975,000 CONNERTON EAST COMMUNITY DEVELOPMENT DISTRICT
SPECIAL ASSESSMENT BONDS, SERIES 2025 (ASSESSMENT AREA TWO)

SCHEDULE 1 - REBATE REQUIREMENT CALCULATION

| | |
|---|---|
| 4 / 16 / 2025 | ISSUE DATE |
| 4 / 16 / 2025 | BEGINNING OF COMPUTATION PERIOD |
| 4 / 15 / 2026 | COMPUTATION DATE |

| DATE | FUND/ACCOUNT | INVESTMENT VALUE AT COMPUTATION DATE | EARNINGS ON INVESTMENTS | OTHER DEPOSITS (WITHDRAWALS) | FUTURE VALUE AT BOND YIELD 5.4908% | ALLOWABLE EARNINGS |
|---|---|---|---|---|---|---|
| 4 / 16 / 2025 | INITIAL DEPOSIT | | 0.00 | 87,701.66 | 92,569.36 | 4,867.70 |
| 5 / 1 / 2025 | INTEREST ACCOUNT | | 141.77 | 0.00 | 0.00 | 0.00 |
| 5 / 2 / 2025 | INTEREST ACCOUNT | | 0.00 | (141.77) | (149.28) | (7.51) |
| 6 / 2 / 2025 | INTEREST ACCOUNT | | 291.94 | 0.00 | 0.00 | 0.00 |
| 6 / 3 / 2025 | INTEREST ACCOUNT | | 0.00 | (291.94) | (305.97) | (14.03) |
| 6 / 16 / 2025 | INTEREST ACCOUNT | | 0.00 | (87,701.65) | (91,737.39) | (4,035.74) |
| | | 0.01 | 433.71 | (433.70) | 376.72 | 810.42 |
| 4 / 16 / 2025 | INITIAL DEPOSIT | | 0.00 | 212,450.00 | 224,241.59 | 11,791.59 |
| 4 / 16 / 2025 | COSTS OF ISSUANCE FUND | | 0.00 | (55,000.00) | (58,052.66) | (3,052.66) |
| 4 / 16 / 2025 | COSTS OF ISSUANCE FUND | | 0.00 | (45,000.00) | (47,497.63) | (2,497.63) |
| 4 / 16 / 2025 | COSTS OF ISSUANCE FUND | | 0.00 | (47,500.00) | (50,136.39) | (2,636.39) |
| 4 / 16 / 2025 | COSTS OF ISSUANCE FUND | | 0.00 | (11,700.00) | (12,349.38) | (649.38) |
| 4 / 16 / 2025 | COSTS OF ISSUANCE FUND | | 0.00 | (6,250.00) | (6,596.89) | (346.89) |
| 4 / 16 / 2025 | COSTS OF ISSUANCE FUND | | 0.00 | (1,750.00) | (1,847.13) | (97.13) |
| 4 / 16 / 2025 | COSTS OF ISSUANCE FUND | | 0.00 | (3,500.00) | (3,694.26) | (194.26) |
| 4 / 17 / 2025 | COSTS OF ISSUANCE FUND | | 0.00 | (35,000.00) | (36,937.04) | (1,937.04) |
| 4 / 22 / 2025 | COSTS OF ISSUANCE FUND | | 0.00 | (6,750.00) | (7,118.22) | (368.22) |
| 5 / 1 / 2025 | COSTS OF ISSUANCE FUND | | 8.13 | 0.00 | 0.00 | 0.00 |
| 6 / 2 / 2025 | COSTS OF ISSUANCE FUND | | 0.03 | 0.00 | 0.00 | 0.00 |
| 7 / 1 / 2025 | COSTS OF ISSUANCE FUND | | 0.03 | 0.00 | 0.00 | 0.00 |
| 8 / 1 / 2025 | COSTS OF ISSUANCE FUND | | 0.03 | 0.00 | 0.00 | 0.00 |
| 9 / 2 / 2025 | COSTS OF ISSUANCE FUND | | 0.03 | 0.00 | 0.00 | 0.00 |
| 10 / 1 / 2025 | COSTS OF ISSUANCE FUND | | 0.03 | 0.00 | 0.00 | 0.00 |
| 10 / 2 / 2025 | COSTS OF ISSUANCE FUND | | 0.00 | (8.28) | (8.52) | (0.24) |
| | | 0.00 | 8.28 | (8.28) | 3.47 | 11.75 |
| 4 / 16 / 2025 | INITIAL DEPOSIT | | 0.00 | 340,642.51 | 359,549.15 | 18,906.64 |
| 5 / 1 / 2025 | DEBT SERVICE RESERVE FUND | | 550.65 | 0.00 | 0.00 | 0.00 |
| 6 / 2 / 2025 | DEBT SERVICE RESERVE FUND | | 1,135.68 | 0.00 | 0.00 | 0.00 |
| 7 / 1 / 2025 | DEBT SERVICE RESERVE FUND | | 1,099.51 | 0.00 | 0.00 | 0.00 |
| 8 / 1 / 2025 | DEBT SERVICE RESERVE FUND | | 1,140.05 | 0.00 | 0.00 | 0.00 |
| 9 / 2 / 2025 | DEBT SERVICE RESERVE FUND | | 1,140.55 | 0.00 | 0.00 | 0.00 |
| 10 / 1 / 2025 | DEBT SERVICE RESERVE FUND | | 1,081.18 | 0.00 | 0.00 | 0.00 |
| 11 / 3 / 2025 | DEBT SERVICE RESERVE FUND | | 0.00 | (4,461.29) | (4,571.37) | (110.08) |
| 11 / 3 / 2025 | DEBT SERVICE RESERVE FUND | | 1,090.12 | 0.00 | 0.00 | 0.00 |

$9,975,000 CONNERTON EAST COMMUNITY DEVELOPMENT DISTRICT
SPECIAL ASSESSMENT BONDS, SERIES 2025 (ASSESSMENT AREA TWO)

SCHEDULE 1 - REBATE REQUIREMENT CALCULATION

| | |
|---|---|
| 4 / 16 / 2025 | ISSUE DATE |
| 4 / 16 / 2025 | BEGINNING OF COMPUTATION PERIOD |
| 4 / 15 / 2026 | COMPUTATION DATE |

| DATE | FUND/ACCOUNT | INVESTMENT VALUE AT COMPUTATION DATE | EARNINGS ON INVESTMENTS | OTHER DEPOSITS (WITHDRAWALS) | FUTURE VALUE AT BOND YIELD 5.4908% | ALLOWABLE EARNINGS |
|---|---|---|---|---|---|---|
| 12 / 1 / 2025 | DEBT SERVICE RESERVE FUND | | 1,011.12 | 0.00 | 0.00 | 0.00 |
| 1 / 2 / 2026 | DEBT SERVICE RESERVE FUND | | 998.21 | 0.00 | 0.00 | 0.00 |
| 2 / 2 / 2026 | DEBT SERVICE RESERVE FUND | | 972.51 | 0.00 | 0.00 | 0.00 |
| 3 / 2 / 2026 | DEBT SERVICE RESERVE FUND | | 876.40 | 0.00 | 0.00 | 0.00 |
| 4 / 1 / 2026 | DEBT SERVICE RESERVE FUND | | 968.56 | 0.00 | 0.00 | 0.00 |
| 4 / 15 / 2026 | INTEREST ACCRUAL | | 468.18 | 0.00 | 0.00 | 0.00 |
| | | 348,713.94 | 12,532.72 | 336,181.22 | 354,977.78 | 18,796.56 |
| 4 / 16 / 2025 | INITIAL DEPOSIT | | 0.00 | 9,134,705.83 | 9,641,708.43 | 507,002.60 |
| 5 / 1 / 2025 | ACQUISITION AND CONSTRUCTION FUND | | 14,766.38 | 0.00 | 0.00 | 0.00 |
| 5 / 8 / 2025 | ACQUISITION AND CONSTRUCTION FUND | | 0.00 | (8,914,793.42) | (9,378,493.61) | (463,700.19) |
| 6 / 2 / 2025 | ACQUISITION AND CONSTRUCTION FUND | | 7,490.89 | 0.00 | 0.00 | 0.00 |
| 7 / 1 / 2025 | ACQUISITION AND CONSTRUCTION FUND | | 777.09 | 0.00 | 0.00 | 0.00 |
| 8 / 1 / 2025 | ACQUISITION AND CONSTRUCTION FUND | | 806.49 | 0.00 | 0.00 | 0.00 |
| 9 / 2 / 2025 | ACQUISITION AND CONSTRUCTION FUND | | 806.84 | 0.00 | 0.00 | 0.00 |
| 10 / 1 / 2025 | ACQUISITION AND CONSTRUCTION FUND | | 764.84 | 0.00 | 0.00 | 0.00 |
| 11 / 3 / 2025 | ACQUISITION AND CONSTRUCTION FUND | | 0.00 | 4,461.29 | 4,571.37 | 110.08 |
| 11 / 3 / 2025 | ACQUISITION AND CONSTRUCTION FUND | | 771.17 | 0.00 | 0.00 | 0.00 |
| 12 / 1 / 2025 | ACQUISITION AND CONSTRUCTION FUND | | 736.17 | 0.00 | 0.00 | 0.00 |
| 1 / 2 / 2026 | ACQUISITION AND CONSTRUCTION FUND | | 728.29 | 0.00 | 0.00 | 0.00 |
| 2 / 2 / 2026 | ACQUISITION AND CONSTRUCTION FUND | | 709.54 | 0.00 | 0.00 | 0.00 |
| 3 / 2 / 2026 | ACQUISITION AND CONSTRUCTION FUND | | 639.41 | 0.00 | 0.00 | 0.00 |
| 4 / 1 / 2026 | ACQUISITION AND CONSTRUCTION FUND | | 706.65 | 0.00 | 0.00 | 0.00 |
| 4 / 15 / 2026 | INTEREST ACCRUAL | | 341.58 | 0.00 | 0.00 | 0.00 |
| | | 254,419.04 | 30,045.34 | 224,373.70 | 267,786.19 | 43,412.49 |
| | | 603,133.00 | 43,020.06 | 560,112.94 | 623,144.16 | 63,031.22 |

| | |
|---|---|
| ACTUAL EARNINGS | 43,020.06 |
| ALLOWABLE EARNINGS | 63,031.22 |
| REBATE REQUIREMENT | (20,011.16) |
| COMPUTATION DATE CREDIT | (2,170.00) |
| CUMULATIVE REBATE REQUIREMENT | (22,181.16) |

# Tab 5

Date of inspection 8/20/26

| Pole ID | Address | Date submitted | Date Completed |
|---|---|---|---|
| 83959608 | Connerton Blvd North Side 3rd Light East from Flourish Intersection | 7/21/2026 | 8/20/2026 |
| 83239468 | Connerton Blvd North Side 2nd Light East from Flourish Intersection | 7/21/2026 | 8/20/2026 |
| 87041536 | Connerton Blvd and Gallantree East of Pinecrest Academy | 7/21/2026 | 8/20/2026 |
| 43795084 | Connerton Blvd West of Flourish on South side 3rd down from Flourish intersection | 7/21/2026 | 8/20/2026 |
| Unknown | Connerton Blvd and Collier Pkwy intersection 3rd light East from intersection (blinking) | 8/22/2026 | |
| Unknown | Connerton Blvd and Collier Pkwy intersection 4th light East from intersection (blinking) | 8/22/2026 | |

# Tab 6

Sitex Aquatics
LAKE & FOUNTAIN SERVICES

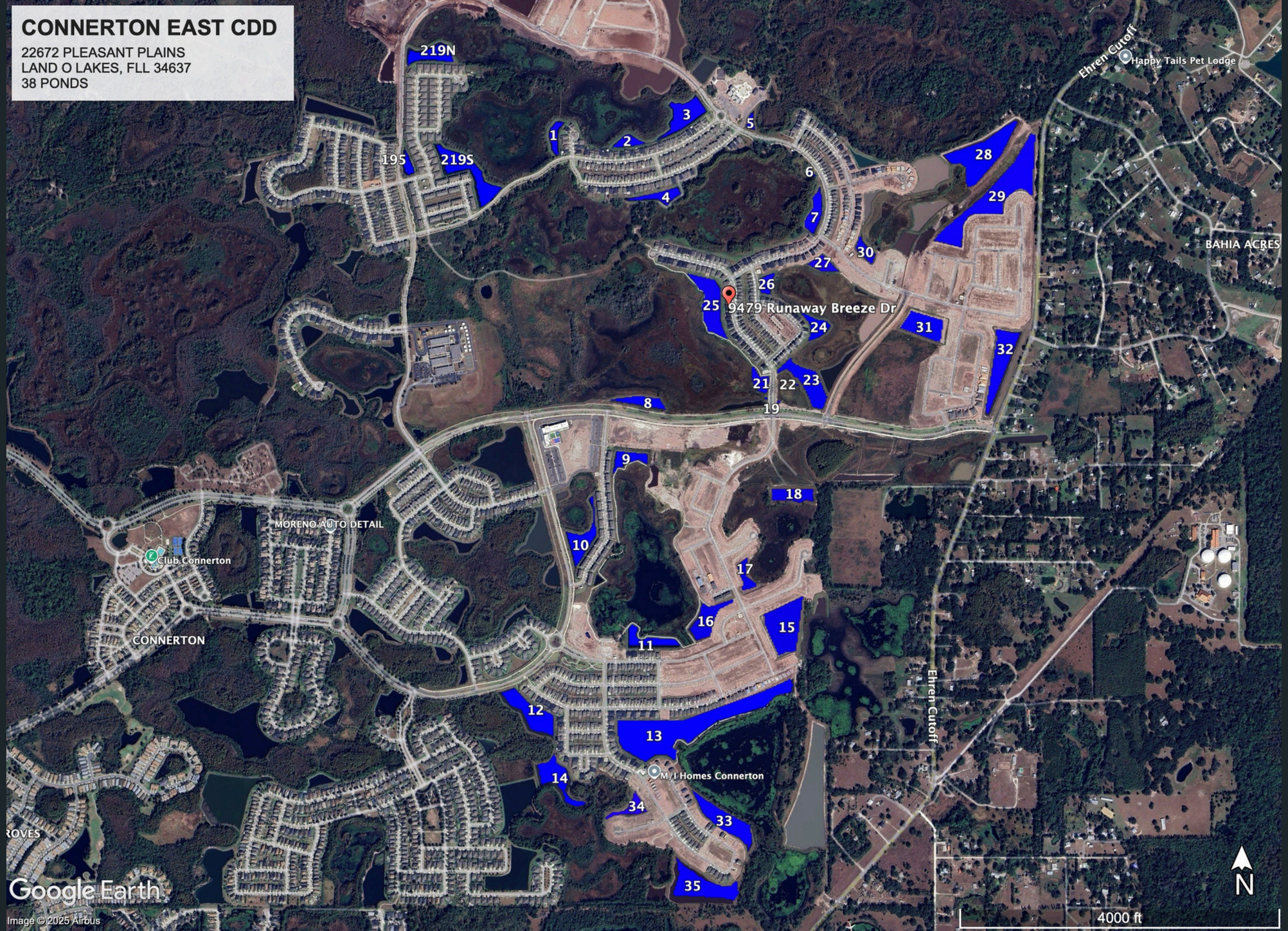
# MONTHLY REPORT

SEPTEMBER, 2026



# CONNERTON EAST CDD

22672 PLEASANT PLAINS
LAND O LAKES, FLL 34637
38 PONDS



# SUMMARY:

Hopefully, cooler air temperatures are just around the corner. Right now, however, we are still experiencing high temperatures, which are also keeping water temperatures elevated. With the large amount of rainfall, pond turnover is possible and could result in fish loss.

Our applications are being conducted in a way that helps prevent dissolved oxygen loss. However, with the water remaining warm, dissolved oxygen levels are low and algae growth is high. Because of this, applications are being done strategically in targeted areas to help prevent fish loss as well.




Treated for Algae and Shoreline Vegetation.




Treated for Algae and Shoreline Vegetation.




Treated for Shoreline Vegetation.




Treated for Algae and Shoreline Vegetation.




Treated for Algae and Shoreline Vegetation.



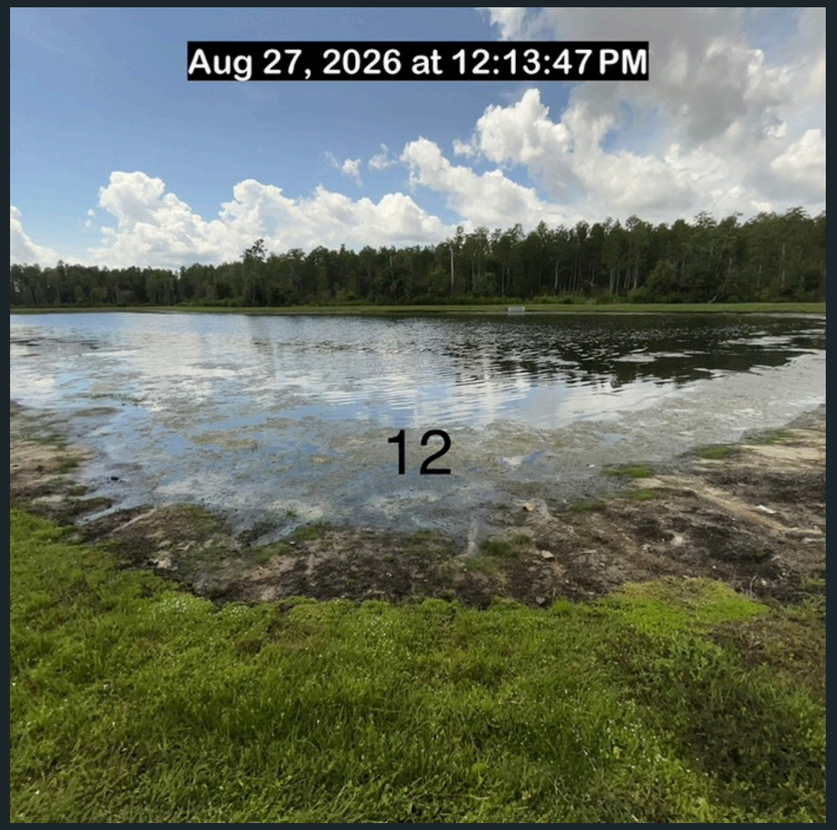

Treated for Shoreline Vegetation.




Treated for Shoreline Vegetation.




Treated for Shoreline Vegetation.




Treated for Algae and Shoreline Vegetation.




Treated for Algae and Shoreline Vegetation.




Treated for Algae and Shoreline Vegetation.




Treated for Shoreline Vegetation.

# Tab 7

# CONNERTON EAST

## COMMUNITY ASSET MANAGEMENT REPORT




September 1, 2026

Rizzetta & Company
John R Toborg – Division Manager
Community Asset Management

Rizzetta & Company
Professionals in Community Management

# Flourish, Violet Periwinkle, Campanula Park

**Summary, General Updates, Recent & Upcoming Maintenance Events**

The following are action items for Steadfast Contractor's Alliance (SCA) to complete. Please refer to the item # in your response listing action already taken or anticipated time of completion. Red text indicates deficient from previous report. **Bold Red text** indicates deficient for more than a month. Green text indicates a proposal has been requested. Blue indicates irrigation. Orange is for staff and **Bold Black Underlined** is information or questions for the District BOS.

1. When is the anticipated date of new sod installation throughout many areas of the CDD? Flags have been in place now for several weeks from west Flourish to east Flourish and Little Bluestem (LB) from Flourish to Storybook Cabin.

2. Also, when is the area in front of the Bellflower monument at Violet Periwinkle and Flourish going to be improved? I thought this was discussed at the previous BOS Mtg. (Pic 2)




3. **The sidewalk extension along the south side of Violet Periwinkle (VP) to Flourish has been completed. (Pic 3>)**

4. We should pin down and mulch over any irrigation drip lines that are adjacent to the sidewalk like this area a the mail kiosk on the Adriatic side of the VP/Campanula park. Remove any dead Juniper from the bed in this location. (Pic 4>)

5. Grassy weeds still are overtaking the lawn at the SE corner of the VP/Campanula park. These areas were bare in the past and have now filled in with weeds. (Pic 5>)

6. This turf on the wetlands side of the trail adjacent to the dog park is included in the replacements. When will this occur? (Pic 6>)

7. Campanula cul-de-sac still needs weeds eradicated from pavers and curb.






# Campanula, Ashworth Park, Flourish Northward Past Violet Periwinkle









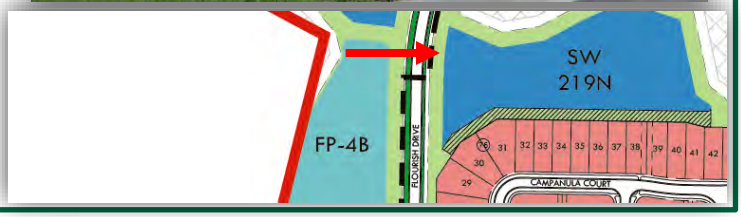




8. It appears crews are still not maintaining the east side of Flourish north of VP - neither the ROW nor the back side of the sidewalk and pond bank. I can sort of understand the ROW as it remains unfinished in many areas, however, there is no reason why the back side and pond bank should not be maintained. In fact, the entire pond perimeter could use a sprucing up. (Pics 8a – c>)

9. There is a dead Bald Cypress between Flourish and Pond SW 219N. SCA to flush cut this tree. Is irrigation to these pond bank trees being affected by the previous roadway construction on Flourish? Or has everything been re-connected. (see >)



10. There has been no improvement to the condition of an Oak on the east side of Flourish between LB and VP. Sometimes, right after periods of severe drought, when rains begin again, trees are so parched they literally guzzle up water when it becomes available. With this water, the tree also guzzles up any chemicals that have been applied to the ground beneath, including any herbicides. I've experienced this at another community, and the trees did come back, although only certain limbs on those trees were affected. This tree is completely affected. **We can wait to see if the tree recovers and flushes out new growth. Or would the BOS prefer me to request a proposal for a new Oak? (Pic 10)**




11. It is being reported that the turf on the entire property was treated mid-August. It is not clear, though, with what. There are areas on the north side of LB east of Ashworth still not responding positively. And I do not see stakes in the ground indicating this will be replaced. (Pic 11>)

12. Unfortunately, turf on the north side of LB from Nyssa to nearly Storybook is back on the decline. Is this fungal related? I looked at a couple spray stakes, but it wasn't indicated what was applied. (Pic 12)




13. **Should we have this traffic sign on the south side of LB near Nyssa either removed or changed out? It is no longer a dead end. Turf condition on the south side of LB is also obvious in this photo. (Pic 13>)**

14. Please make sure that all trails are being maintained properly, specifically those that are



composed of crushed asphalt. There are areas that are being encroached upon by native Bermuda and other turf-like weeds. Once this is established, it is difficult to eradicate and appears very aesthetically unappealing for many weeks once they are sprayed and dead. (Pic 14)







15. These palms at Storybook Cabin and Florish could use a pruning. Also, make sure these are getting adequate amounts of Palm Special fertilizer – 8-2-12+4Mg at 1 ½ lb. of fertilizer per 100 SF of palm canopy. Some of these fronds look like they are fading green, sometimes a symptom of “N” deficiency. However, do not apply heavy Nitrogen as this will have an adverse effect on other nutrients in the fertilizer. (Pic 15>)

16. Areas of turf along the ROW of Storybook Cabin south of Flourish that were in decline and then improved are in decline again. Could this be fungal related in response to all the recent rains? Is the irrigation set to not run after a certain amount of rain has fallen?

17. Turf on the south ROW of Storybook Cabin at the large open CDD-maintained area is also on the decline. Although the actual ROW is not dark green on this maintenance exhibit, it is to be maintained by the CDD. (see below)




18. Approaching Flourish from Storybook Cabin, water is running out of the open CDD-maintained area and across the sidewalk, through the turf ROW and down the curb and gutter. This seems like an awful lot of runoff from any recent rains we may have received. I did speak with the irrigation lead who explained to me that when the water is turned off, low pressure causes these valves to weep for a while. (Pic 18>)



# Flourish Lift Station at Little Bluestem

19. SCA has reported an issue with the ongoing challenges of chinch bug control as many have built up a chemical resistance to available insecticides. SCA have included UF Blog articles reporting on this in their responses and will discuss with the BOS. Taken from the article, I would encourage SCA/Terrapin to not only switch up insecticides, but also classes of insecticides as this turf between Storybook Cabin and the roundabout at Flourish and LB continues to decline. (Pics 19a – c>).

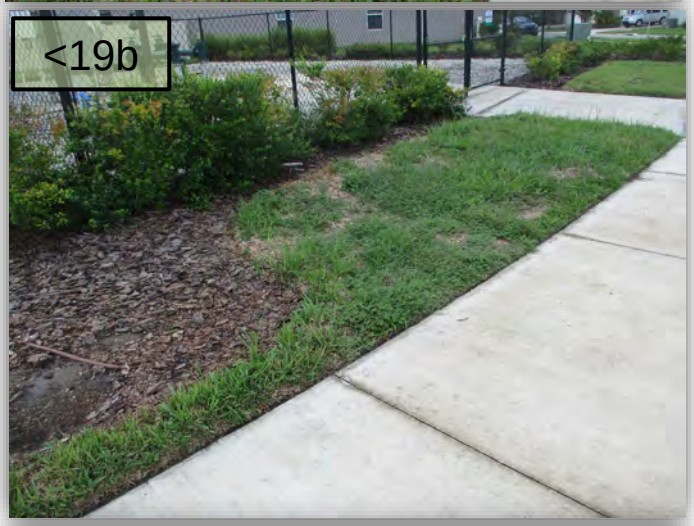



20. This large area of turf on the east side of Storybook Cabin, south side of Flourish (a chronically bad area of turf) is mostly weeds at this point. I also see there are large areas yellowing – often a precursor to fungus. Inspect and treat accordingly. (Pic 20)













21. This very large bed of Fakahatchee Grasses in the same lawn as Item No. 20 to the left, are mostly brown, however, not a “Spider-Mite-Looking” brown. It is more of a fungal brow, SCA to diagnose and treat accordingly. (Pic 21>)

# Conner House, Flourish, Pondered Day/Collier Parkway

22. At a board meeting a few months back, the request was made for SCA to add this section of ROW in front of the Conner House to be replaced as part of a larger turf installation project. It was not replaced. (Pic 22)




23. Several areas of turf on the north ROW Of Flourish between the Conner House and Sword Fern are declined. Some of these areas are flagged, which I assume means they are going to be replaced. Can SCA please provide a date? (Pic 23>)

24. There are no flags in the north ROW of Flourish just west of Sword Fern, but the turf definitely needs to be replaced. When will this occur? (Pic 24>)

25. Dead head African Iris at Sword Fern mail kiosk.




26. Although the south ROW of Flourish east of the Sword Fern mail kiosk was flagged back in July for replacement, it still has not been replaced. When will this be completed?

27. **<u>Is there a date as to when the sidewalk at Pondered Day and Collier Parkway will be re-installed?</u>**

28. Make sure all ornamentals along the east side of the fence extending north of Pondered Day on the west side of Collier Parkway are receiving adequate ornamental fertilizer. Many plants (Dw. Firebush) are quite leggy.






# Maintenance Exhibit Alterations

**29. I just noticed this during this inspection, but our new maintenance exhibit shows striping along pond banks behind residential homes. And I am also noticing that many pond banks behind homes have not been mowed. This protocol is in place at another CDD which I referenced when providing a "sample" maintenance exhibit to use as an example when updating ours. I do not believe this protocol is in place at Connerton East. I am including the graphic as well as language dedicated to this protocol which is shown at the bottom right-hand corner of our maintenance exhibit. I would like confirmation from the BOS to remove this from our exhibit. This is not just limited to those examples shown below, but is shown in the entire maintenance exhibit.**
**(see below)**




NOTE:

- CDD IS RESPONSIBLE FOR MAINTENANCEOF ALL SIDEWALKS (ALL MATERIAL TYPES)
- PER THE "COMMUNITY CHARTER AND DECLARATION OF RESTRICTIONS FOR RESIDENTIAL PROPERTIES", WHERE LOTS ARE ADJACENT TO CDD PROPERTY OR COMMON AREA CONTAINING ANY LAKE OR POND HOMEOWNERS ARE RESPONSIBLE FOR LANDSCAPE AND MAINTENANCE BETWEEN THE LOT AND SHORELINE.

# Gladsome Way Park, Scouter Bee/Half Bench Park

30. Water is standing in many beds inside Raised Tulip/Gladsome Way Park. Should we be dialing back the irrigation? I also see Podocarpus are still dying – they hate wet feet. We must've had a recent downpour as there are large areas of collected mulch on the sidewalks. (Pic 30)




31. Water is also standing in the Scouter Bee/Half Bench Lane Park planter beds and turf. A Feijoa is failing – probably from standing in water. There are also a couple dead Juniper up on the NE corner of this park. Warranty replacement. (Pics 31a & b>)




32. There is a dead Sabal Palm on the west side of Scouter Bee near the 90° turn to the east. Warranty replacement. (Pic 32>)

33. **As previously reported, there is an enormous amount of hog damage at the northern end of the PVC fence between Pondered Day Lane and Ehren Cutoff. There are also several dead plants including an Oak that is not thriving. Exposed irrigation drip lines are everywhere. In addition to the hog damage there is one very significant washout and a few others starting to form a couple hundred feet south of the hog damage area. (Pics 33a – f>)**






# Ehren Cutoff North Hog Damage and Washouts


















# Ehren Cutoff North, Connerton Blvd.,

34. **<u>There are the beginnings of more washouts south of the hog damage area as referenced above. These would be in the vicinity of Pondered Day and the next street south of the cul-de-sac. (see below)</u>**



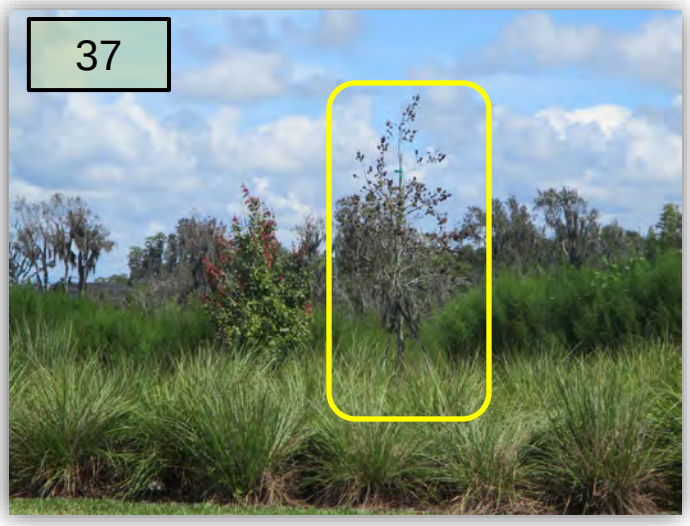

35. This Oak is on the north side of Connerton Blvd., just west of Ehren Cutoff near the monument. It is losing its leaves and is not scratching very green. This may need to be replaced under warranty. (Pic 35)




36. On the north side of Connerton Blvd. east of Gallantree in the first Sabal Palm cluster, there is a dead Sabal Palm that needs to be replaced. Is this still under warranty? (Pic 36)




37. There is also a dead Red Maple in the vicinity as above near the trail on the north side of Connerton Blvd. This should be flush cut. **<u>I do not think it will be missed unless the BOS would like it replaced. (Pic 37)</u>**




38. Hand pull very tall weeds from the ornamental grass beds on the sides of Connerton Blvd. east of Flourish.

39. Once again, the Flax Lily beds on either side of Connerton Blvd. (worse on the north side) are under water. Do we need to dial back the irrigation?

# Pleasant Plains Parkway, Gallantree

40. The pond bank on the west side of PPP south of Connerton Blvd. as well as the rear pond bank of the pond north of Gallantree are both quite tall – seed heads AND turf blades. (Pic 40)




41. What is the status of the Sabal Palm replacement(s) between the Townhomes north of Gallantree and PPP? There was some confusion regarding which ones needed to be removed and replaced. I am referring to the tallest one behind the townhomes. (Pic 41)




42. The dead palm is still in place at the Townes at Fernside trailhead. This was supposed to have been removed and replaced a few weeks ago. (Pic 42>)

43. The Gallantree median at the north end needs to be weeded. Were some plants replaced recently? There are plants near the northern tip of the median that are much smaller than most of the existing plants – but most have died. (Pic 43)




44. The plant beds along the trail behind the Townes at Fernside need to be weeded. For clarification, the landscape area between the trail and the townhomes is not green on our exhibit. Are these areas supposed to be maintained by the CDD or the association? (see > & Pic 44)

45. Several weeks ago, an East Palatka Holly was removed from a grouping of three near the western side of Fountain Park. It was never replaced. When will this tree be replaced? (Pic 45>)



# Townes at Fernside, Fountain Park

46. Just like those on Flourish east of Storybook Cabin, I feel these Fakahatchee Grasses in Fountain Park are failing because they are sitting in water and not because of Spider Mites. SCA to diagnose, treat accordingly and cut to low mounds. (Pic 46)













47. There are a lot of failing Podocarpus in the Pleasant Morning median adjacent to Fountain Park – again it is very soppy and Podos hate wet feet. (Pic 47)




48. This is the same thing previously reported in Item No. 18 earlier in the report – either drip lines are running after heavy rainfalls or valves continue to weep after the reclaimed has been shut off by the county. This, though, is a tremendous amount of water running out of the Fountain Park beds, over the sidewalk and into the curb and gutter on Painted Sky Place. This was also like this last month. (Pic 48>)

# Painted Sky, Pleasant Plains Parkway

49. **This is a leaning, damaged light pole on the northern leg of Painted Sky where Painted Sky intersects itself.**
**(Pic 49a & b and below)**













50. This bed on the north side of PPP almost to the Connerton West boundary is the East CDD's to maintain. It remains a mess.
(Pic 50 & below)








# Proposals

1. SCA to provide a proposal to fill in this bed of Confederate Jasmine at the VP/Campanula mail kiosk park on the north side. Pedestrians are cutting through and have damaged drip lines (probably) as well as many plants. Please fill as densely as possible (as close as 12” – 18” o.c. using FULL 3 Gal. plants. (Pic 1)




2. SCA to provide a proposal to flush cut a very tall dead Pine Tree adjacent to the dog park. (Pic 2)




3. Since we seem to not be experiencing great luck with either Variegated Confederate Jasmine (VCJ - shown here) or Confederate Jasmine, I would like to request that SCA provide a proposal to remove what remains of this VCJ at the Storybook Cabin mail kiosk and replace with 3 Gal., FULL Little John Bottlebrush on 24” centers. Ensure an adequate quantity and spacing of irrigation driplines are in place. I would also like to suggest this at the Campanula cul-de-sac outside the dog park where the Confederate Jasmine is also failing. (Pic 3)




4. The Shore Juniper on the Connerton Blvd. median and ROWs west of Pleasant Plains Parkway (PPP) are not thriving. It is simply too wet. SCA to provide a proposal to remove the remaining plants and install 3 Gal., FULL Dwarf Firebush , *Hamelia patens, “Firefly compacta”.* This variety of Dw. Firebush naturally stays much lower than the standard variety and has leaves approaching a burgundy color – especially going into fall. (Pics 4a – c>)

# Proposals










5. SCA to provide a proposal to remove and replace a dead Sabal Palm inside Fountain Park closer to Pleasant Morning. Replacement palm should be the same species and height as the one being removed. (Pic 5)



# Tab 8

# CONNERTON EAST

## COMMUNITY ASSET MANAGEMENT REPORT




July 17, 2026

Rizzetta & Company
John R Toborg – Division Manager
Community Asset Management

Rizzetta & Company
Professionals in Community Management

# Flourish, Violet Periwinkle, Campanula Park

**Summary, General Updates, Recent & Upcoming Maintenance Events**

The following are action items for Steadfast Contractor's Alliance (SCA) to complete. Please refer to the item # in your response listing action already taken or anticipated time of completion. Red text indicates deficient from previous report. **Bold Red text** indicates deficient for more than a month. Green text indicates a proposal has been requested. Blue indicates irrigation. Orange is for staff and **Bold Black Underlined** is information or questions for the District BOS.

1. I would hope that with the uptick in rainfall and the application of various fertilizers, there would be more of a top growth expansion of turf in several areas along Flourish (east lawn) as well as along both sides of Little Bluestem (LB) east of Flourish & Campanula Park. However, still appears bare areas are growing. What are the most recent fertilizer applications and what is scheduled in the near future? Treat weeds. (Pics 1a – d>)













2. Remove tree straps from the trees in Campanula Park.

3. As of the 17th, the dead trees in the wetland as Red Bay Loop curves to the north are still in place. When are these scheduled to be removed? (Pic )

# Red Bay Loop, Dog Park, Campanula

4. When will the Walter's Viburnum be planted to finish off the dog park entrance line? (Pic 4)




5. Eradicate and line trim all weeds between the curbing and pavers on the Campanula cul-de-sac.

6. **<u>We are handling this severe erosion behind a couple homes on the north leg of Campanula Court as a separate project. (Pics 6a – c>)</u>**

7. Remove a broken limb from a tree directly behind the Bellflower monument at Violet Periwinkle and Flourish.

8. The landscape along the Flourish extension north of Periwinkle as well as the landscaping along the north side of LB needs to be delineated and "terraced" better.













9. I did call this into the SCA irrigation team – water was coming over the curbing along the south side of LB between Flourish and Nyssa, particularly through the expansion joints. Is there a beak in a pipe or a broken head here?

# Little Bluestem

10. Properly prune a broken Pine branch along the PVC fence on the north side of LB. It would be great if SCA could paint this wound immediately after cutting it to help prevent the invasion of pine borers. (Pic 10)



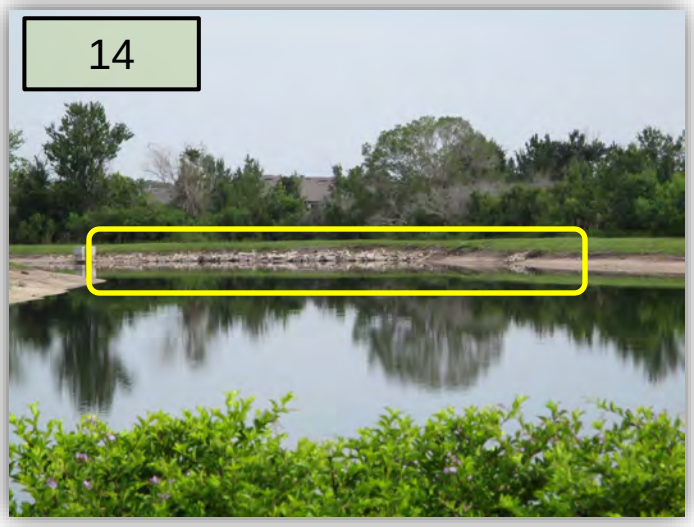

11. Will the newer installed bed of Variegated Confederate Jasmine along the fence on the north side of LB be replaced? This bed was beautiful and full last year and is now non-existent. Plus, the irrigation drip lines are a mess in this bed.

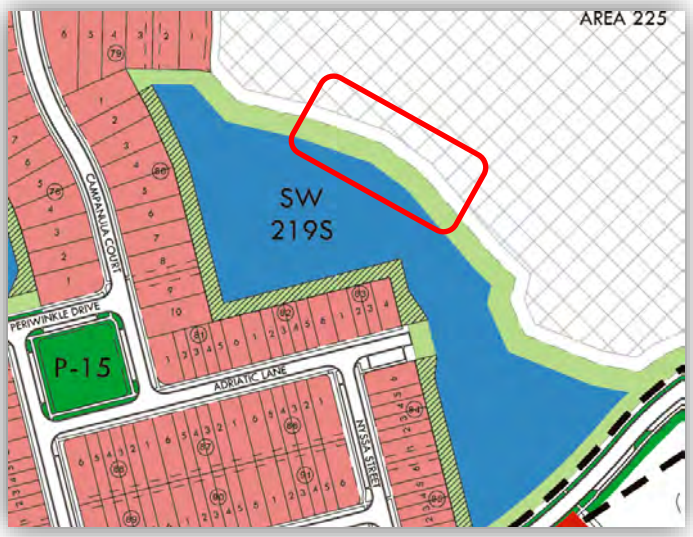
12. What is occurring with these struggling Sandankwa Viburnum along the north side of LB east of Nyssa? (Pic 12)




13. I feel the compacted turf in front of the same fence mentioned above could benefit from a core aeration prior to soil amendments being applied. (Pic 13>)

14. **<u>There are more areas of erosion forming on the northern bank of Pond SW 219S east of Nyssa/north of LB.</u>**
**<u>(Pic 14 and below)</u>**






# Little Bluestem, Storybook Cabin

15. I would like to see if SCA could flush cut this failing next to last Red Maple on the north side of LB before getting to Storybook Cabin Way. (Pic 15)




16. There are many palms within the community that need to be trimmed. Please remove ONLY those fronds that are brown, broken or interfering with architectural structures, signage or traffic signs or streetlights. Yellowing fronds should remain and nothing above the 9 o'clock – 3 o'clock line should be removed. (Pic 16)




17. There are still dead Variegated Confederate Jasmine at the Storybook Cabin Way mail kiosk as well as completely brown Fakahatchee Grasses. When will these be either removed or drenched and cut to low mounds respectively?

18. Turf is suffering even more than it was several weeks ago on the south side of Flourish between Storybook Cabin Way and LB. It also extends to the area in front of the lift station at the roundabout. What is being done here to stop the spread of whatever is causing this? (Pics 18a & b)







19. This is the turf on the south side of Flourish where the LB resident used the ROW for access. It has, since the 17th, been restored by the resident. However, I want to ensure there is working irrigation on the back side of the sidewalk where St. Augustine was installed. (Pics 19a - d>)

# Flourish, Sword Fern, Pleasant Plains Parkway

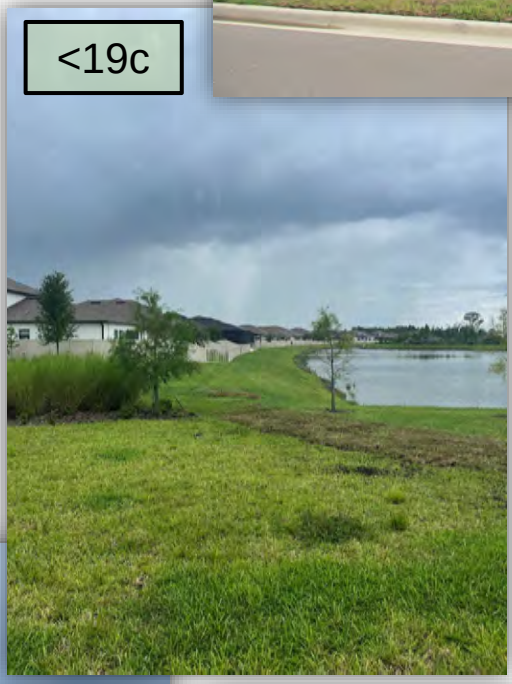



20. Mentioned before, are these areas under streetlights (here on the north side of Flourish, east of Storybook Cabin W[illegible] being inspected for mole crickets and treated. (Pic 20)










21. Eradicate Torpedograss from the beds on the north side of Flourish west of Sword Fern. When will this turf be replaced in the same area? I would think that with the new turf being installed at the Pleasant Plains Parkway (PPP) roundabout, new sod could also be getting installed in all these Other locations. (Pic 21)






# Berry Patch, Raised Tulip Park

22. **A green circle needs to be added to the end of the Berry Patch cul-de-sac. This is a beautifully planted cul-de-sac. (see below)**




23. **This drainage easement has now been opened back up along the north side of Berry Patch for easier access to Pond SW 4H1. (Pic 23 and above)**




24. Although much of the turf in Raised Tulip Park was top-dressed a few months ago, I feel there needs to be further action to continue to improve the condition of this turf as it is beginning to show a bit more brown throughout. Perhaps a quarterly or bi-annual core aeration prior to adding soil amendments may help to improve air and water uptake in the root zones where it is needed. (Pic 24>)

25. There are still dead Podocarpus around the electrical meters near the mail kiosk in the same park as above. These need to be replaced under warranty.

26. Although quite a task, it would improve the current look of the Society Garlic if all spent blossoms could be removed. (Pic 26)




27. It's been months since this tree on the north side of Raised Tulip Park was flush cut. It still needs to have the tree ring restored, irrigation capped and new turf installed. (Pic 27)

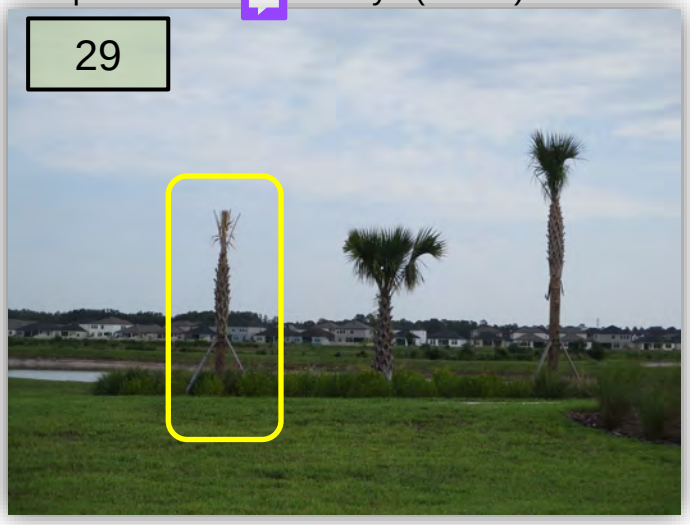





# Connerton Blvd., Pondered Day, Collier Parkway

28. When was the last time the turf on the north side of Connerton Blvd. on either side of Runaway Breeze fertilized? I feel it should be much greener.

29. When will this palm on the north side of Connerton Blvd. east of Runaway Breeze be replaced under warranty? (Pic 29)




30. We need to make sure we are regularly tipping these native Dwarf Firebush along the PVC fence on the north side of Pondered Day at Collier Parkway northern extension. They can quickly become very leggy instead of tight and compact. (Pic 30)




31. There is still this failing turf on the south side of Connerton Blvd., east of Gallantree that has not improved at all for several months. What is being done here to improve this turf? (Pic 31>)

32. When will the tree rings be restored where the trees were removed on the east side of PPP south of the school? The trees are beginning to come back from the roots.

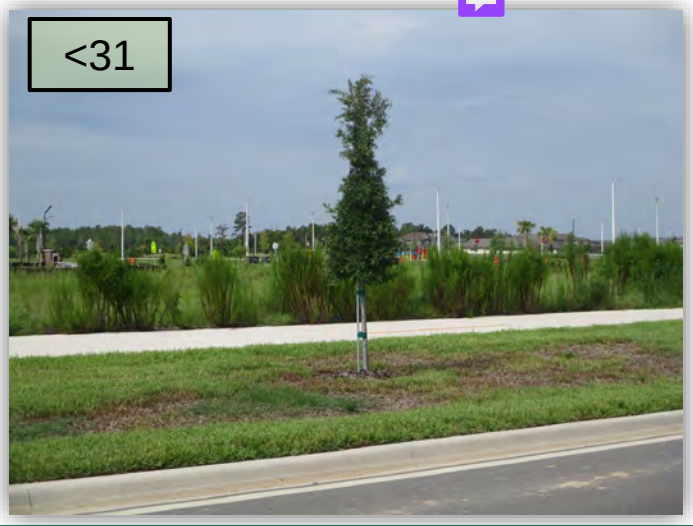
33. Both sides of Connerton Blvd. between PPP and Flourish had standing water behind the curbs. Was this simply a result of a recent rain or is there a broken irrigation pipe/head? (Pic 33)




34. SCA to flush cut this dead tree south of the school on the east side for PPP> (Pic 34>)

35. I feel some of the turf inside Fountain Park is suffering from Chinch Bug. Treat accordingly. (Pic 35>)

36. The area at the dead end of Nebula needs to be maintained better and turf needs attention.



# Nebula Way

This is partially maintained by the resident.
(Pic 36> and below)




<36




<34



<35



# Proposals

1. SCA to provide a proposal to fill in these bare areas of Gold Mound Lantana and Texas Sage at the Runaway Breeze cul-de-sac using 3 Gal., FULL plants and existing spacing to determine a quantity. (Pics 1a - c)









# Tab 9

# ESTIMATE

Steadfast Alliance
San Antonio FL 33576 US

| DATE | DUE | ESTIMATE # |
|---|---|---|
| 8/18/2026 | | |

**BILL TO**
Connerton East CDD
C/O Rizzetta & Company
3434 Colwell Avenue
Suite 200
Tampa FL 33614

**SHIP TO**
SM1074 / 401
Connerton 219
Flourish Drive
Land O Lakes FL 34637 USA

| DESCRIPTION | QTY | RATE | AMOUNT |
|---|---|---|---|
| This proposal is to fill in plants on the Runaway Breeze cul-de-sac where plants are missing. | | | |
| Texas Sage 3gal | 10.00 | 18.00 | 180.00 |
| Lantana, Gold Mound 3gal | 30.00 | 20.00 | 600.00 |
| Irrigation Enhancement | 3.00 | 85.00 | 255.00 |

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

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

**TOTAL** **1,035.00**

**Accepted this _____ day of _____, 20_____.**

**Signature: _____**

**Printed Name and Title: _____**

**Representing (Name of Firm): _____**

# Tab 10

Rizzetta & Company

## UPCOMING DATES TO REMEMBER

- **Next Meeting:** October 13, 2026 @ 9:00 am

# District Manager's Report

September 8,

# 2026

CONNERTON EAST CDD

| FINANCIAL SUMMARY | | 07/31/2026 |
|---|---|---|
| General Fund Cash & Investment Balance: | | $1,398,563 |
| Debt Service Fund Cash & Investment Balance: | | $2,351,360 |
| Capital Projects Fund Cash & Investment Balance: | | $ 2,599 |
| **Total Cash and Investment Balances:** | | **$3,752,522** |
| **General Fund Expense Variance:** | **$172,837** | **Under Budget** |