



# *Suncoast Community Development District*

**May 13, 2026**

**Agenda Package**

**TEAMS MEETING INFORMATION**

**Meeting ID:** 287 954 052 331 70  
**Call-In Number:** +1 646-838-1601

**Passcode:** aq2zF2ch  
**Conference ID:** 845 881 238#

2005 Pan Am Circle, Suite 300  
TAMPA, FL 33607

## **CLEAR PARTNERSHIPS**



**COLLABORATION**



**LEADERSHIP**



**EXCELLENCE**



**ACCOUNTABILITY**



**RESPECT**

# Suncoast Community Development District Agenda Page 2

## Board of Supervisors

Matthew Thebeau, Chairperson  
Edmund Latif III, Vice Chairperson  
Tammy Latif, Assistant Secretary  
Melissa Ramacco, Assistant Secretary  
John Vento, Assistant Secretary

## District Staff

Alba Sanchez, District Manager  
Kathryn "KC" Hopkinson, District Counsel  
Phil Chang, District Engineer  
Sergio Inguanzo, District Accountant  
John Fowler, Field Inspector  
Kareen Baker, District Admin

## Regular Meeting Agenda

Wednesday, May 13, 2026, at 7:00 p.m.

Join Teams Meeting

**Meeting ID:** 287 954 052 331 70 **Passcode:** aq2zF2ch

**Call-In Number:** 1 646-838-1601 **Conference ID:** 845 881 238#

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*All cellular phones and pagers must be turned off during the meeting. Please let us know at least 24 hours in advance if you are planning to call into the meeting.*

- 1. Call to Order/Roll Call**
- 2. Motion to Approve Agenda**
- 3. Audience Comment** *(Each individual has the opportunity to comment and is limited to three (3) minutes for such comment)*
- 4. Special Business Item**
  - A. Consideration of Proposals for District Management and Field Services
    - i. Vesta District Services ..... Page 4
    - ii. Rizzetta & Company ..... Page 51
    - iii. Kai ..... Page 84
    - iv. Inframark ..... Page 104
    - v. Governmental Management Services (GMS) ..... Page 129
- 5. Staff Reports**
  - A. Inframark Field Inspection April 2026 Report ..... Page 163
  - B. Fieldstone Landscape Report ..... Page 171
    - i. Tree Trimming Proposal #1301582 ..... Page 190
    - ii. Prairie Iris Entrance Bed Proposal #22949 ..... Page 193
    - iii. Installation of Screening Hedge Proposal #22950 ..... Page 197
  - C. Fieldstone Irrigation Report ..... Page 200
  - D. District Counsel
    - i. Reminder of Submission of Form 1 ..... Page 216
  - E. District Engineer
  - F. District Manager
    - i. Information on the Number of Registered Voters – 1,415 ..... Page 226
- 6. Business Items**
  - A. Consideration of Pond Fountain Repair Proposal
    - i. Steadfast Alliance Estimate #SCA3968 ..... Page 227
  - B. Consideration of Pressure Washing Proposals
    - i. Total Pressure Power-Wash & Seal ..... Page 228
    - ii. Kings Power Washing Services ..... Page 229
    - iii. Riptide Pressure Washing, LLC ..... Page 232
    - iv. Jayman Enterprises, LLC ..... Page 239
    - v. Inframark ..... Page 240
  - C. Consideration of EZ-Mulch Estimate #6074 for Mulch Installation ..... Page 250
  - D. Consideration of Steadfast Alliance Pond Maintenance Proposal ..... Page 253

## District Office:

Pan Am Circle, Suite 300  
Tampa, FL 33607  
(813) 873-7300

## Meeting Location:

Marriott SpringHill Suites  
16615 Crosspointe Run,  
Land O'Lakes, FL 34638

**7. Business Administration**

- A. Approval of the Minutes of the April 20, 2026, Regular Meeting ..... Page 259
- B. Review of March 2026 Financial Report and Consideration of Check Register..... Page 263

**8. Supervisors' Requests or Comments**

**9. Audience Comments** *(Each individual has the opportunity to comment and is limited to three (3) minutes for such comment)*

**10. Adjournment**

***\*\*The next Regular meeting will be held on Wednesday, June 10, 2026, at 7:00 p.m.\*\****

**District Office:**  
Pan Am Circle, Suite 300  
Tampa, FL 33607  
(813) 873-7300

**Meeting Location:**  
Marriott SpringHill Suites  
16615 Crosspointe Run,  
Land O'Lakes, FL 34638

# Proposal for District Management

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Suncoast CDD  
Community Development District



**Vesta District Services**  
*Your Community, Our Commitment*

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**FLORIDA'S COMMUNITY MANAGEMENT SPECIALIST**  
*A 30-YEAR TRACK RECORD WORTHY OF YOUR TRUST*



**CELEBRATING 30 YEARS OF SERVICE  
TO OUR COMMUNITIES  
1995 - 2025**

April 6th, 2026

Re: Suncoast Community Development District - Proposal for District Management

Dear Board of Supervisors,

On behalf of Vesta Property Services Inc., it is my pleasure to submit the following proposal for District Management-related services for your Community Development District. This submission outlines our company's qualifications and capabilities, in hopeful anticipation of providing these important services to the Board and residents of your District.

Vesta has extensive experience managing transitions between management companies for large districts and understands the importance of a strong initial commitment. We have successfully supported previous transitions by providing both amenity and field operations assistance, and we are fully familiar with the unique challenges and service requirements involved. Our team is enthusiastic about the opportunity and ready to begin immediately, bringing trusted professionals you can rely on.

Vesta's proposal includes the services of our talented and experienced District Manager Heath Beckett, with Barry Jeskewich as the backup District Manager, overseen and supported by our local Regional Director of District Services, Kyle Darin (see bios within). You will also have the assistance of our uniquely qualified financial, accounting, and administrative leadership and support teams to resolve any immediate issues and to forward plan for the benefit of the residents of the District. You will also receive Vesta's industry-leading Amenity Management support, with unparalleled access to resources designed to enhance the resident and board experience. Of special note, I am pleased to be able to say our proposal offers no increase when compared to the current fiscal 2026 budget.

Thank you for your consideration of our proposal. We very much look forward to the opportunity to serve the community and work with the District, the Board of Supervisors, and other District staff. Should you have any questions or require additional information, please feel free to contact me directly at (321) 263-0132 x742 or [kdarin@vestapropertyservices.com](mailto:kdarin@vestapropertyservices.com).



Most respectfully,

*Kyle Darin*  
*District Services Regional Director*  
250 International Pkwy #208  
Lake Mary, Florida 32746  
(321) 263-0132 x742





# OUR STORY



## ABOUT US

Founded in 1995 and headquartered in Jacksonville, Florida, **Vesta's success has been driven by three key factors** :

- Our commitment to meeting our clients' needs, first and foremost.
- Our Culture is our "secret sauce" and allows us to source and hire the best associates in the industry.
- The close Teamwork between our (1) Senior Management team, (2) Shared Services associates both in our corporate headquarters and part of our close regional support, and (3) industry's best-in-class Frontline Managers and their teammates in a variety of operational disciplines.



### MISSION & VALUES

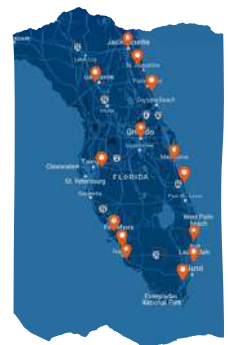
Vesta's Mission is to provide communities with exceptional associates delivering unparalleled management and lifestyle services. To that end, we ensure outstanding support for our clients & associates.

Our Three Core Values are:

- Be Accountable
- Act Respectfully
- Serve Honorably





### OUR REACH

We have fifteen (15) fully-staffed offices based throughout Florida including Lake Mary, Sun City, and Delray . Vesta successfully provides a wide-ranging suite of professional community management services from Amelia Island to Miami and almost every city in between.



# OUR HISTORY: COMPANY OVERVIEW, TIMELINE & MILESTONES

Originally incorporated as Point Management in 1973, Vesta Property Services, Inc. provides financing, management, and ancillary services to developers of planned-unit communities and resident associations in connection with clubhouses, golf courses, amenity and infrastructure facilities, and commercial real estate, as well as Special District and governmental agency management. Below is a timeline featuring some key milestones that have marked our journey:

<p>1995</p> 	<p><b>THE LAUNCH OF VESTA PROPERTY SERVICES, INC.</b></p> <p>In Jacksonville, Florida, Frank Surface's trailblazing vision launches Vesta Property Services to be a single source for: (1) affordable and flexible financing, (2) expert community management services, and (3) creative and thriving lifestyle services - all under one umbrella, consistently improving and growing, and propelled by a best-in-class Senior Leadership Team.</p>
<p>2011</p> 	<p><b>AMENITIES LEADERSHIP</b></p> <p>Vesta acquires Florida's leading, statewide provider of amenities management services - Amenity Services Group, Inc. - specializing in serving the vital operations, maintenance, and lifestyle needs of Community Development Districts since 1997.</p>
<p>2020</p> 	<p><b>DISTRICT SERVICES / STATEWIDE OFFICES</b></p> <p>Vesta brought our vision of becoming a premier full-service community management company to life by acquiring DPF Management &amp; Consulting, LLC - a specialist in district management and financing - in 2020.</p>
<p>Present</p> 	<p><b>GROWTH</b></p> <p>Vesta now has 15 offices throughout Florida, manages over 600 communities and special districts, and employs 1,200 associates for our clientele.</p>

## OFFICE INFORMATION

### Business Information:

- Proposer Name: Vesta Property Services, Inc.
- Address: 245 Riverside Avenue #300
- City Jacksonville State Florida Zip Code 32202
- Telephone (904) 355-1831 Fax no. (904) 204-2469
- 1<sup>st</sup> Contact Name: Scott Smith Title: Vice President, District Services
- 2<sup>nd</sup> Contact Name: Kyle Darin Title: Regional Director, District Services
  
- Parent Company Name (if any) PMG Holdings
- Street Address 5401 N. Central Expressway #290
- P. O. Box (if any)
- City Dallas State TX Zip Code 75205
- Telephone (214) 272-4074 Fax no. (214) 751-2397
- 1st Contact Name Jose B. Maldonado Title Treasurer
- 2nd Contact Name Jason Villalba Title Secretary
  
- Vesta's statewide footprint includes 18 offices throughout Florida, encompassing over 1,100 associates supporting local operations.
- Proposer's Corporate Form: **Corporation**
- In what State was the Proposer organized? **Florida** Date **November 12, 1995**  
**Charter No. P95000090161**

### Vesta is aware and in compliance of the following disclosures:

- Public Entity Crimes: Proposers should be aware of, and in compliance with, all requirements under Section 287.133, Florida Statutes, on Public Entity Crimes. A representation of compliance will be included in the Agreement.
- Scrutinized Companies: Proposers should be aware of, and in compliance with, all requirements under Section 287.135, Florida Statutes, on Scrutinized Companies. A representation of compliance will be included in the Agreement.
- E-Verify. Proposers should be aware of, and in compliance with, all requirements under Section 448.095(2)(c), Florida Statutes, on E-Verification requirements. A representation of compliance will be included in the Agreement.
- Anti-Human Trafficking. Pursuant to Section 787.06, Florida Statutes, if a proposer submits a proposal the proposer will provide an affidavit, signed by an officer or a representative of the Proposer representing that they do not use coercion for labor or services as defined in the statute, addressed to the District, as required by Section 787.06(13), Florida Statutes. **See following page.**

# OFFICE INFORMATION

**ANTI-HUMAN TRAFFICKING AFFIDAVIT**

I, [name] Scott V. Smith as [position] Vice President on behalf of [company] Vesta District Services (the "Contractor"), under penalty of perjury hereby attest as follows:

1. I am over 21 years of age and an officer or representative of the Contractor.
2. The Contractor does not use coercion for labor or services as defined in Section 787.06(2)(a), *Florida Statutes*.
3. More particularly, the Contractor does not participate in any of the following actions:
  - (a) Using or threatening to use physical force against any person;
  - (b) Restraining, isolating or confining or threatening to restrain, isolate or confine any person without lawful authority and against her or his will;
  - (c) Using lending or other credit methods to establish a debt by any person when labor or services are pledged as a security for the debt, if the value of the labor or services as reasonably assessed is not applied toward the liquidation of the debt or the length and nature of the labor or services are not respectively limited and defined;
  - (d) Destroying, concealing, removing, confiscating, withholding, or possessing any actual or purported passport, visa, or other immigration document, or any other actual or purported government identification document, of any person;
  - (e) Causing or threatening to cause financial harm to any person;
  - (f) Enticing or luring any person by fraud or deceit; or
  - (g) Providing a controlled substance as outlined in Schedule I or Schedule II of Section 893.03, *Florida Statutes*, to any person for the purpose of exploitation of that person.

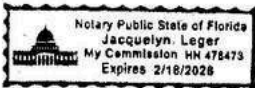
FURTHER AFFIANT SAYETH NAUGHT.

COMPANY: Vesta District Services  
 By: [Signature]  
 Name: Scott V. Smith  
 Title: Vice President  
 Date: 12/19/25

STATE OF FLORIDA  
 COUNTY OF Seminole

SWORN TO AND SUBSCRIBED before me  physical presence or  remote notarization by Scott Smith, as Vice President of Vesta District Services who is  personally known to me or  who produced \_\_\_\_\_ as identification this 9 day of December, 2025.

(Notary Seal) [Signature]  
Notary Public



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## Outstanding Litigation:

All prior cases (e.g., slip-and-fall, wrongful termination, dram shop liability, age discrimination) have been dismissed or settled by insurance; no pending or threatening litigation that would impact service viability.

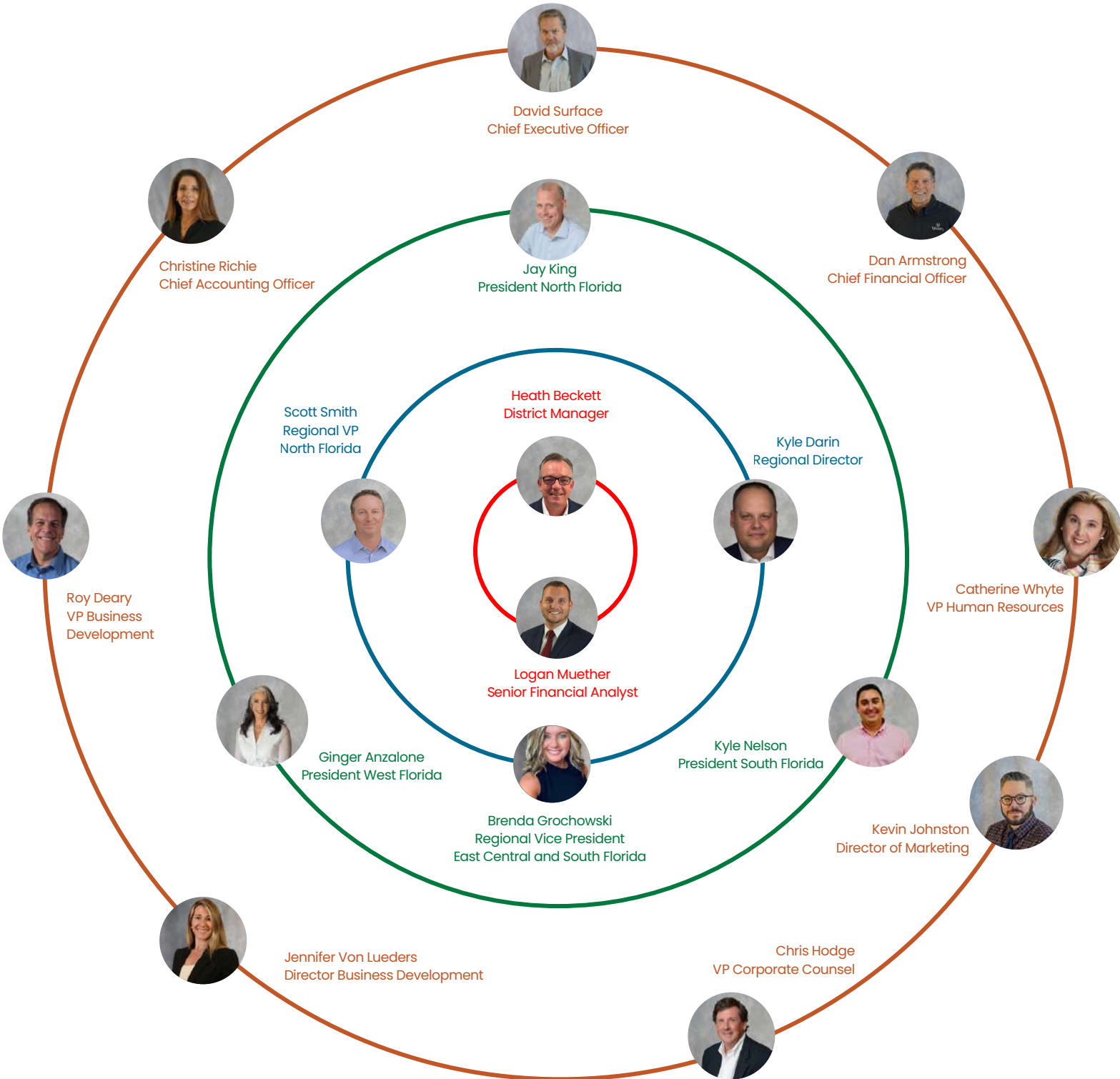
# DISTRICT MANAGEMENT ORGANIZATIONAL CHART

Corporate Support Team

Leadership Team

Support Team

On-Site Team





# DISTRICT MANAGEMENT



## EXPERIENCE AND LOCATIONS

Vesta District Management Services currently is contracted by the following CDDs below:

- Avalon Groves CDD
- Beach CDD (Tamaya) CDD
- Bridgewater of Wesley Chapel CDD
- Cabot Citrus Farms CDD
- Cascades at Groveland CDD
- City Center CDD
- Epperson North CDD
- Epperson Ranch CDD
- Fleming Island Plantation CDD
- Grand Haven CDD
- Hawk's Point CDD
- Heritage Harbor CDD
- Magnolia Park CDD
- Marshall Creek CDD
- Panther Trace CDD
- Panther Trace II CDD
- Parkland Preserve CDD
- Radiance CDD
- Saddle Creek CDD
- Seminole Palms CDD
- Stoneybrook at Venice CDD
- Sweetbay CDD 1
- Sweetbay CDD 1 Non-Residential
- Sweetbay CDD 2
- Sweetbay CDD 2 Non-Residential
- Sweetbay CDD 3
- Sweetbay CDD 4
- Sweetbay CDD 5
- Sweetbay CDD 6
- Sweetbay CDD 7
- Sweetwater Creek CDD
- The Preserve at South Branch CDD
- The Preserve at Wilderness Lake CDD
- Trout Creek CDD
- Union Park East CDD



Vesta is a proud recipient of the

**FLCAJ  
READERS CHOICE**  
*Diamond Award*

For the **8th** consecutive year!

## EXPERTISE

The following outlines Vesta's specific experience, qualifications, and duties related to general District Management services.

- M** | **Meetings, Hearings, Workshops, Capital Planning**
- Plan, Organize, Lead, and Facilitate/Conduct all Meetings, Workshops and Public Hearings.
  - Supervisor Orientations, Training and Serving as a Trusted Advisor.
  - Lead Boards in Executive Goal Setting for the District.
  - Bond Refinancing, Assessment Methodology, Establishments.

- C** | **Capital Planning**
- We offer Strategic long-term Capital Planning, using reserve studies and financial outlook analysis modeling.
  - Executive level experience in all aspects of long-term infrastructure budget management.

- R** | **Records**
- We maintain a robust, highly organized filing system when it comes to District records. Everything from communications to meeting minutes, invoices and check registers are archived and maintained by our professional team of Administrators.
  - Like our Accounting team, our Administrators are readily available to assist with any document or record required by Supervisors, and to respond to Public Records requests of the District. The administrator will be proficient in providing requested information quickly.

- D** | **District Operations**
- Plan, organize and lead in the operational oversight of CDDs with operations and capital budgets in excess of \$25 million.
  - Oversee performance of Amenity and Field Operations personnel, vendors, and District contracts.
  - Experienced District Managers with prominent level of Facilities Operations knowledge in public works, infrastructure improvements including, storm water systems, roads, and bridges and highly amenitized facilities.

- A** | **Accounting & Reporting, Audits, Budgeting, Administration, Assessments & Revenue Collection**
- Accounting administration of combined operational and debt service budgets in excess of \$41.3 million.
  - Placing special assessments on County tax bill, and/or collect directly, for 21,487 parcels throughout 10 counties in Florida.
  - Provided construction accounting for capital improvement programs in excess of \$80 million.
  - Assessment consultant on 55 CDD bond issuances; issuing, refunding, or restructuring debt in excess of \$450 million.

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## EXPERTISE

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### **Approach, Methodology & Experience**

#### Philosophy and Approach

- Vesta's approach is centered on transparency, accountability, and resident experience, guided by:
- Executive-level planning and oversight for CDDs exceeding \$25M in operational budgets.
- Emphasis on capital planning, fiscal control, and board partnership.
- Training for Supervisors and Executive Goal Setting sessions.

#### Technology Platforms

- Accounting: In-house district accounting division using GASB-compliant systems.
- Maintenance Management: Preventative maintenance, inspections, and QR/barcode tracking systems for field operations.
- Enumerate Engage Software

### **Staff Continuity and Turnover**

Vesta emphasizes associate retention through culture, training, and benefits, with low turnover across comparable Florida CDDs. District Managers are cross-trained and supported by backup managers to ensure continuity during absences.

### **Compliance & Legal Standing**

- No active governmental enforcement actions, suspensions, or OSHA citations.
- No active worker injuries or lost-time incidents in five years.
- Not barred or suspended from any federal, state, or local contracting.
- No recent litigation.

### **Best Practices & Resident Engagement**

- Development of Landscape Accountability Tool for measurable vendor scoring.
- Resident engagement through Q&A sessions, digital newsletters
- Leverage of industry leading engineers and attorneys, along with our extensive experience in community turnover from developers to resident boards.
- Speeding/Parking guidance: collaborative solutions involving patrol coordination, signage, and communication campaigns.

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## COMMUNICATION PLATFORM

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Utilizing the latest technology, we created Vesta Vantage Pro® as a communication and productivity tool for boards, committees, and residents. Easy-to-use and maintain, Vesta Vantage Pro® provides your community with a platform to distribute information, educate, and support the community. Our online services will help you efficiently and economically:

- Target and send group emails.
- Collect resident information.
- Support resident services and access to information.
- Provide education on procedures and rules.

Your Community Website and/or downloadable applications can be sent to your mobile device, so residents and stakeholders will experience the ultimate level of service, convenience, savings, and management efficiency.

### **Online Forms:**

Bring our management office online for convenience and "an office that never closes."

### **Board Member Access:**

Board Members can access all financial reports, maintenance reports, homeowner accounts, violation history and all other community information.

### **Online Resource Center:**

Offers a secure, easy-to-organize, centralized location for important documents such as covenants and bylaws, board and committee meeting minutes and newsletters. Association information is in one place – online and available 24 hours a day, 7 days a week.

### **Messenger Service:**

Notify individual residents, board members, or committee members of matters requiring immediate attention; to send a reminder about an upcoming event; and to distribute documents electronically (governing documents, newsletters, etc.).

### **For Our Employees:**

Vesta's Managers are equipped with the latest software to access Community documents, edit, sign, and send while out in the field.

**Community Inspections:** (see details on next page) are efficiently managed through our ability to send pictures and notes of homeowner violations (regarding our HOA Management engagements) or Vendor issues direct to our database for documentation.

# WORK ORDERS, INSPECTIONS, & PREVENTATIVE MAINTENANCE SOFTWARE

(Included in contract)

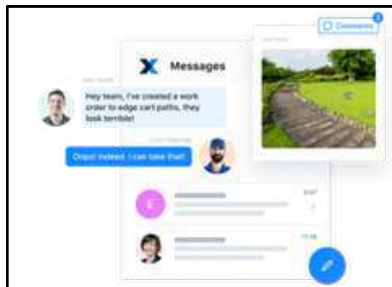
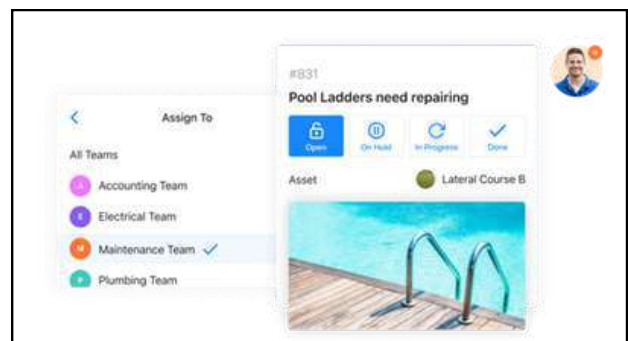


## Schedule Inspections

Never worry about an inspection falling through the cracks. We set due dates and repeatability settings and get alerts when inspections are past due. We all ensure everyone is using the most up-to-date inspections and performing work accurately.

## Work Orders

Know what's working and what isn't, and who is fixing what, when. We assign Work Orders to our Team (or vendors) to fulfill maintenance requests related to community assets, infrastructure, and equipment. (Allows tasks to be scheduled with staff as well as vendors.)

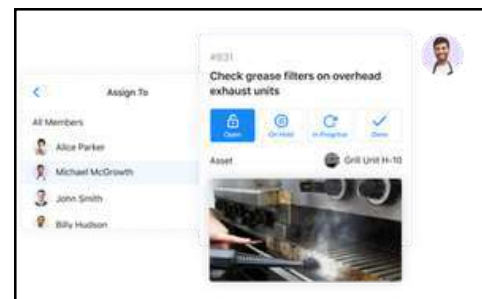


## Collaborate

One centralized communication platform. No more switching between emails, phone calls, and text messages to discuss work to be done.

## Maintain Quality Control

Reduce downtime and ensure that your equipment runs safely and efficiently to meet or surpass standards.



## QR and Barcode Scanning

Manage parts, inventory, and assets with barcode scanning. This allows management to pull warranties, invoices, and work orders on one specific item. For example, a QR Code would be added to a pool heater. Maintenance tech/vendor would be able to add a warranty, work order details, etc. In the field.

# VENDOR MANAGEMENT

## Vesta's Approach


Communication centered on establishing clear expectations for all parties along with timely and accurate feedback enables appropriate accountability with our vendors, which results in better results for our clientele. Vesta has developed tools such as our "Landscape Accountability Tool" that aligns a vendor's contract with efficient evaluation criteria, to best-ensure timely, specific, and measurable feedback and the highest levels of service. We have also worked to create more competition in the marketplace by using our performance management system to draw in new vendors as needed.


RECCD I, II and III Landscape Deficiency Report		February		March				April							
Contracted Item Description		1/28-1/30	1/31-2/6	2/7-2/13	2/14-2/20	2/21-2/27	2/28-3/6	3/7-3/13	3/14-3/20	3/21-3/27	3/28-4/4	4/5-4/10	4/11-4/17	4/18-4/24	4/25-5/1
Annuals	Contractor shall replace approximately Two thousand four hundred (2,400) annuals in four (4) inch pots up to four (4) times per year in designated areas noted on the service area map and maintain annuals to ensure a healthy appearance. (pg 30)														
	Contractor will remove dead or dying annuals before the appearance of such annuals could be reasonably described as an eyesore. If the beds are left bare prior to the next planting, Contractor will keep such beds free of weeds at all times until the next planting rotation occurs. (pg 30)	3	4	5	4	5	5	4	4	4	3	3	3	5	5
Total Items		31	33	30	30	28	32	26	28	28	30	34	30	30	30
Total Possible Points		155	165	150	150	140	160	130	140	140	150	170	150	150	150
Total Actual Points		127	143	132	124	116	137	112	120	132	127	147	122	126	110
% of Total Possible Points		82%	87%	88%	83%	83%	86%	86%	86%	94%	85%	86%	81%	84%	73%


- Content is derived strictly from the landscape contract's scope-of-work.
- Contracted service items are placed by week in a calendar, based on when they are to be completed.
- Vendor's work is evaluated weekly by Vesta; this generates a score that is reviewed first with the vendor and then with the Board.


Timeliness-of-Work Scoring	Pts.
Completed within timeframe of contract/stated by vendor.	2
Completed but NOT in timeframe of contract or vendor.	1
Not completed.	0
<b>Quality-of-Work Scoring</b>	
No discrepancies per contract's standards.	3
Minor discrepancies per contract's standards.	2
Major discrepancies per contract's standards.	1
Work not performed to contract's standards.	0
<i>Maximum Points per each Contracted Task:</i>	5

In other communities, we utilize software and applications for work orders and accountability, selected according to the size and specific needs of each community. The software can be integrated into our website directly or used manually by staff and vendors to start, track, and complete work orders. This allows us to report the work, track time, show pictures and hold all parties responsible for completion of work.

 PICTURES



 VENDORS

 Vesta Property Services

**Time & Cost Tracking**

*No time entries or costs recorded*

Daily Pool Maintenance Checklist #2302706

Daily pool maintenance and chemical readings

Chlorine level\*

The meter will be selected in the work order.

PH level\*

The meter will be selected in the work order.

Total Alkalinity level\*

The meter will be selected in the work order.

Cyanuric Acid level\*

The meter will be selected in the work order.

Calcium Hardness level\*

The meter will be selected in the work order.

Daily Pool Maintenance Checklist #2302706

Flow GPM\*

The meter will be selected in the work order.

Filters Clean\*

Pool Gutters Clean\*

Pool clean, vacuum/skim as needed\*

Sheppard's hook, life rings and skimmer in are in proper working condition\*

# of Patrons

Notes

Checklist Photos\*

Amenity Center Daily Checklist #2331008

Daily Inspection of Amenity Center

Open restrooms

Open fitness center

Pickup trash and debris at the amenity center, playgrounds, basketball courts, dog parks as needed

Pickup trash and debris around entryway monuments and common areas as needed

Blow off all areas of the amenity center & walkways as needed

Ensure all stormwater drains around the amenity center are free of leaves and debris

**Section #1**

Notes

Checklist Photos\*



## Pool Chemical Readings - Cross Creek North

June 1, 2025 - July 22, 2025

Export to Excel

Date	Work Order ID	Technician	Main Pool Chlorine	Main Pool pH	Lap Pool Chlorine	Lap Pool pH	Splash Pad Chlorine	Splash Pad pH	Notes
06/26/2025	#43	Leniel Feliz	No data	No data	No data	No data	No data	No data	Daily maintenance completed
06/27/2025	#44	Leniel Feliz	No data	No data	No data	No data	No data	No data	Daily maintenance completed
06/30/2025	#75	Leniel Feliz	No data	No data	No data	No data	No data	No data	Daily maintenance completed
07/01/2025	#78	Leniel Feliz	2.0	7.8	10.0	7.4	10.0	8.0	Pools cleaned, equipment checked
07/02/2025	#88	Leniel Feliz	1.0	7.6	10.0	7.4	2.0	7.6	Pools cleaned, equipment checked
07/03/2025	#95	Leniel Feliz	1.0	7.6	10.0	7.4	3.0	7.4	Pools cleaned, equipment checked
07/04/2025	#114	Leniel Feliz	10.0	7.6	3.0	7.6	10.0	8.0	Pools cleaned, equipment checked
07/07/2025	#116	John Williams	0.0	8.0	1.0	7.6	10+	7.8	Let chlorine run manually for lap pool and main pool while unplugged for 3hrs from adding bicarb. Unplugged splash pad. Will adjust controllers after plugging back in.
07/08/2025	#120	Leniel Feliz	3.0	7.6	3.0	7.4	3.0	8.0	Pools cleaned, equipment checked
07/09/2025	#130	Leniel Feliz	5.0	7.6	7.5	7.8	10.0	8.0	Pools cleaned, equipment checked
07/10/2025	#136	Leniel Feliz	1.0	7.0	10.0	7.6	10.0	7.0	Added chemical and backwash
07/11/2025	#151	Leniel Feliz	10.0	7.4	7.5	7.4	10.0	8.0	Splash wasn't feeding acid, fixed it. Lower chlorine on the controller.
07/14/2025	#158	John Williams	10.0	7.6	7.5	7.4	P	7.0	Shocked main pool and splash pad. Draining main pool to bring down CYA.
07/15/2025	#159	John Williams	5.0	7.6	3.0	7.4	1.0	7.6	Pools cleaned, equipment checked
07/16/2025	#171	John Williams	10.0	7.6	5.0	7.4	1.0	7.8	Pools cleaned, equipment checked
07/17/2025	#176	John Williams	10.0	7.6	5.0	7.6	1.0	7.8	Adjusted dials on steners for splash pad
07/18/2025	#183	John Williams	10.0	7.6	5.0	7.8	1.0	7.8	Added CYA to all pools
07/21/2025	#186	John Williams	5.0	7.6	10.0	7.6	5.0	7.6	Did a phosphate treatment on the main pool and splash pad

### MaintainX

**BENEFITS**

- Internal-Work Order Management:** Create, assign and monitor work orders for staff. Assigned tasks range from routine maintenance to complex projects. Also tracks associated material costs and labor hours.
- External-Vendor Coordination:** Streamlines communication and tracking with large external service providers such as landscapers and pool maintenance contractors as well as aids in oversight of complex capital projects.
- Daily Digital Checklists:** Develop and maintain standardized checklists for hospitality staff, maintenance, and management teams to ensure tasks are completed in a timely basis and quality standards are maintained.
- Reporting:** Provide detailed or summary reports for internal purposes and boards. Photos, timelines and comments may be included.
- Asset Inspection Management:** Schedule and oversee routine inspections of community facilities and corporate properties to maintain compliance and identify maintenance needs proactively.

### MaintainX

**FEES**

- Full Use:** Unlimited access to all components. Managers/Supervisors. Fees below.
- Operator:** Limited capability (set algorithms, Maintenance technicians and hospitality staff \$300 per year)

Users	Volume Discount %	Discounted Price/Year
0-10	10%	\$520
11-24	15%	\$500
25-49	20%	\$470
50-99	25%	\$441
100+	33%	\$382

Typical standard fee account: 2 managers (Full Use), 3 maintenance techs and 1 line staff (\$3,720 annually)

### WORK ORDER SUMMARY REPORT - JULY 2025

13 work orders were completed work orders. All work orders were completed by maintenance staff John Williams and Louie Felt.

**Preventive Maintenance (45% of orders)**

- Daily chemical checks and pool maintenance - 15 order covering Chlorine (all monitoring and general pool upkeep)
- Equipment maintenance - Filter cleaning, backwashing, chemical addition (bleach and cyanuric acid)
- Regain Inspections - Landscape reports, pool treatment, fire extinguisher checks

**Responsive Maintenance (55% of orders)**

- Pool and water features - Equipment repairs, filter issues, pressure valve issues
- Facility maintenance - Shading infrastructure, cleaning walkways, organize spaces
- Equipment repairs - O-ring equipment filter, door repairs, sign maintenance
- Resident complaints - Tree removal, accessories, general concerns

**Key Facility Areas Serviced**

**Aquatics**

- Main Pool, Lap Pool, and Splash Pad daily monitoring
- Multiple filter cleaning and equipment repairs
- Chemical treatments including phosphate treatments late in the month

**Amenity Center**

- O-ring replacement maintenance and repairs
- Structural and lighting
- Anticorrosion painting and general cleaning
- Window cleaning and gutter work removed

**Common Grounds**

- Tree removal incidents (small pile filler trees)
- Landscaper replacement maintenance and fertilization and irrigation
- Pool maintenance provider services at pool per contract (see attached report)
- Landscaper removed all snow per contract (see attached report)



## STAFFING

(Please see full bios on the pages 24 - 27)

Team the proposer will assign to the District, including:

- Number of CDDs represented by the proposer
  - **Vesta currently represents 38 Districts.**
- Why the proposer is the best qualified to perform the Scope of Services?
  - **Vesta employs an industry leading team Accounting, Finance, Administration and Management professionals with several levels of supervision and support. Financial dashboards, transactions, and other accounting related items are produced on time with accuracy, and are customizable to the client's needs. Further, with a robust support and staffing structure, continuity and a guaranteed service level are ensured, with no lapses in service due to any unforeseen circumstances. Vesta District Services is a long-established CDD management firm, and part of the larger Vesta Property Services, backed by Associa.**
- Staff team the proposer will assign to the District, including:
  - **Barry Jeskewich, District Manager**
    - **3 years with Vesta: Responsible for 4 CDDs**
    - **Primary District Manager**
      - **Names of the CDDs they represent nearest to the District Panther Trace 1, Hawks Point CDD, Magnolia Park CDD**
    - **LCAM**
    - **5 years in Community Management, 25 years in Hospitality, Tourism, Community Planning, Public Engagement, and Operations Leadership**
  - **Heath Beckett, Associate District Manager**
    - **2 Years with Vesta**
    - **25 years in Community Management and Hospitality**
  - **Kyle Darin, Director of District Services**
    - **5 years with Vesta**
    - **18 years in Community Management, Hospitality, Operations and Leadership**
  - **Patricia Kehr, Accounting Manager**
    - **2 years with Vesta**
    - **27 years in Governmental Accounting**

## STAFFING

How often site visits will be performed and how often the District Manager will meet with District vendors:

- **Site visits will be performed on an as-needed basis, with a minimum once per month visit. Management of the District’s vendors is best achieved through dedicated partnerships between the District Manager, Field Management staff, on-site management, and the vendors themselves. Meetings between those groups whether in-person or virtually are encouraged to be at least twice monthly.**
- How any issues arising after business hours will be handled:
  - **Key Board Supervisors and Staff will have direct contact information for the District Manager to be used in case of emergency at all times.**
- Backup plan for situations where the District Manager is unavailable:
  - **This proposal includes a Backup District Manager along with several layers of support who are kept apprised of District business so in the event the Primary District Manager is unavailable, service can be continued without discrepancy.**
- Escalation procedures and contact information if there are any concerns regarding the assigned District Manager or staff:
  - **The Regional Director of District Services, Kyle Darin, serves as both a resource to the District as well as an escalation at the corporate level if needed. Kyle has ultimate authority to address any and all issues brought by the Board, but hopes to converse regularly with the Board and other staff even if escalation isn’t necessary.**

“

*I highly recommend Vesta for their excellent management services. Their team excels in every way and meets the needs of our District and with their support, we're able to keep our District safe and in compliance, continually make positive progress for our residents, and foster a clean and beautiful environment that is enjoyable for all.*

*Our District manager works with our CDD Board to help us achieve the goals of the District in a very professional, knowledgeable, and expert manner.*

*Again, we are grateful to our District manager and Vesta for setting us up for success.*

*Jennifer Whelihan, Chair; Board of Supervisors – The Preserve at South Branch CDD*

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# EMPLOYEE BENEFITS

## 2025 Benefits at a Glance



### MEDICAL

**HDHP Plan**—A high deductible health plan that is compatible with a Health Savings Account (HSA). This plan offers in and out-of-network coverage and employer contributions to the HSA.

**HMO Core**—Copays for common services such as primary care visits, specialists, urgent care and emergency room. Must receive care in the state of Florida.

**HMO Plus**—Lowest deductible and out-of-pocket maximum with copays on common services. Must receive care in the state of Florida.



### VISION

Receive services from in or out-of-network providers. This plan includes an allowance for frames (every two years) or contact lenses (every year). Small copay for eye exam and materials.



### VOLUNTARY BENEFITS

**Accident**—High and low option. Receive payment when you or a covered dependent experience an unplanned emergency such as fractures, dislocations, burns.

**Critical Illness**—Receive payment if you or a covered dependent are diagnosed with a critical medical condition such as cancer, heart attack, stroke.

**Hospital Indemnity**—Receive payment if you or a covered dependent are admitted to the hospital for an unexpected medical emergency.



### DISABILITY BENEFITS

Short Term Disability (STD) and Long Term Disability (LTD) are available. Receive 60% of your basic annual earnings for a designated benefit period when you are unable to work. This provides coverage for injury, sickness or pregnancy.



### PET DISCOUNT PLAN

Pet Assure Veterinary Discount Plan can save enrollees up to 25% on all in-house medical services at participating veterinarian clinics.



### DENTAL

**Dental HMO**—Lowest cost plan with copays for dental procedures. Services can only be rendered through in-network providers.

**Dental PPO Low**—Receive services from in or out-of-network providers. Ortho coverage is not included.

**Dental PPO High**—Receive services from in or out-of-network providers. This plan has a higher benefit maximum and lower coinsurance. Ortho is included for children and adults.



### LIFE INSURANCE

Basic Life and AD&D coverage is provided in the amount of 1 x your basic annual earnings up to \$50,000. Over 65 age reductions apply. **This is provided to you at no cost!**

Employees can purchase additional life insurance for themselves and eligible dependents. New hires can elect coverage up to the guarantee issue limit without having to submit a medical questionnaire.



### SPENDING ACCOUNTS

Contribute pre-tax dollars to a spending account that assists with paying for eligible medical expenses.

A Flexible Spending Account (FSA) is compatible with the HMO Core or HMO Plus plan and a Health Savings Account (HSA) is compatible with the HDHP Plan. HSA enrollment includes employer contributions!

Contribute pre-tax dollars to a Dependent Care Flexible Spending Account to pay for eligible childcare expenses.



### LEGAL

Access a network of attorneys that can assist with legal matters such as traffic, estate, family law and more. Most attorney fees are covered 100%.



### 401K PLAN

Available to eligible employees after 3 months of employment. For more information and to enroll in the plan, log onto [www.paychexflex.com](http://www.paychexflex.com) or call Paychex at 877.244.1771.





# PERSONNEL



## ON-SITE TEAM

### Heath Beckett

#### Primary District Manager



Heath Beckett is the District Manager overseeing the Tampa and Orlando markets. He joined Vesta Property Services with over 23 years of experience in the hotel and hospitality industry. Heath has held various leadership roles throughout his career, quickly rising through the ranks to become a General Manager at Hilton and, most recently, at Marriott properties.

With a strong background in operations and a passion for delivering exceptional customer experiences, Heath's expertise aligns seamlessly with the community management industry. His hands-on approach and dedication to service excellence make him a valuable asset to the Vesta team.

Heath holds a degree in Data Communications from Cincinnati State College. His combination of technical knowledge and hospitality experience allows him to bring a unique perspective to his role, ensuring communities receive top-tier service and operational efficiency.

### Barry Jeskewich

#### Backup District Manager



Operations, Service, Leadership, and Problem-Solving are key passions of Barry, who forecasts, identifies efficiencies, and coordinate teams to deliver results. Barry has garnered national exposure for multiple professional achievements; the transfer of land ownership from the Indiana Department of Natural Resource decommissioned Avoca Fish Hatchery to the Marshal Township residents, crowdfunding the development of mixed-use public greenspace for the City of Bedford, and the importance of summer camps for development in the lives of our youth.

Barry earned a bachelor's degree in Parks, Recreation, and Leisure Management from Purdue University, is a Licensed Community Association Manager, and a graduate of both the NRPA Directors School and the School of Park Foundations. He has participated in a number of think tank workshops, Podcasts, and mentoring programs.

Before joining Vesta, Barry was the onsite Director of Operations for a large (2,000+ homes) master planned community and CDD in St. Augustine, Florida called Shearwater.

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## SUPPORT TEAM

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### Kyle Darin Regional Director, District Services



Kyle has been with Vesta Property Services since 2021, first serving as our onsite General Manager at MiraBay (Harbor Bay CDD) in Apollo Beach. Prior to Vesta, Kyle held executive leadership roles in world-class hotels and resorts in Tampa, Boca Raton, Las Vegas, and Orlando. Kyle specializes in operations and process management, having led several optimization and efficiency initiatives during his operational career at locations such as the Boca Raton Resort & Club (a Waldorf Astoria Resort), The Hilton and Waldorf Astoria Bonnet Creek, and The Venetian | The Palazzo Las Vegas.

With over 17 years of leadership experience, Kyle has managed budgets in excess of \$100M, teams as large as 4,000 associates, oversaw and managed several capital projects, hotel and community clubhouse renovations and rebranding, and brings with him a passion for service excellence, employee training, and effective management of staff. In his role as District Manager, Kyle is able to provide valuable counsel to boards, sharp insight during the budget process, professional and effective communication, and skilled leadership and management of vendors and fellow staff. Kyle prides himself on building, maintaining, and improving relationships across all industries, and is able to leverage those relationships to the benefit of his clients.

### Scott Smith Vice President, District Services



Scott Smith has over 17 years of experience working with special districts and communities throughout the state of Florida. He joined Vesta in 2020 and became the Vice President of District Services in 2022.

He oversees and supports the District Services team in all aspects throughout the state. Prior to joining Vesta, he was a Director of Operations for another District Management firm out of Tampa for 12 years where he worked as a District Manager, Onsite Amenity Manager & an Association Manager during his tenure with that firm and has experience in all aspects of Community Management. Scott also worked in the hospitality industry before starting in Property Management and held management positions with Universal Studios and The Florida Aquarium in Tampa. Scott is currently involved in multiple industry associations and is also a graduate of the Leadership Tampa Bay Class of 2020.

## SUPPORT TEAM

### Michael Bush Field Service Manager



Michael is a dedicated Field Manager with over 15 years of experience in the property management industry. Throughout his career, he has developed a strong passion for creating outstanding living environments and building lasting relationships with both residents and property owners.

Michael has overseen a diverse portfolio of properties, including multi-family residential units and commercial spaces. These experiences have deepened his understanding of the unique challenges and opportunities that each property type presents. He believes that effective property management extends beyond maintaining buildings—it's about enhancing the quality of life for residents while maximizing value for property owners.

In his role as Field Manager, Michael has successfully led teams across multiple locations, implementing industry best practices and fostering a culture of collaboration. Known for his strong communication skills and supportive leadership style, he takes pride in mentoring his team and helping them grow professionally. His commitment to excellence and team development consistently leads to high resident satisfaction and strong operational outcomes.



*Everyone is professional, courteous and follow through with everything they do! You can tell they care, No complaints!!*

Patrick (Tampa, FL)



### Logan Muether Senior Financial Analyst



Logan Muether is Vesta District Services Senior Financial Analyst with experience relating to special district formation, implementation, financing and management. He has been working with DPF/ Vesta since 2019 and became the Senior Financial Analyst in 2021. Logans primary responsibilities include management and applications of special assessment bonds and methodologies, strategic financial planning, and financial analysis for clients.

As Senior Financial Analyst of our District Management Services Division, Logan develops and prepares the annual budgets and administers all annual assessment rolls for Vesta District Services. During his tenure, Logan has developed budgets totaling over \$200M in special assessments on behalf of the special districts. Logan holds a Bachelor's of Science in Business Administration with a focus in finance from Florida Southern College.

## SUPPORT TEAM

### Johanna "Skye" Lee Controller – District Services



Skye Lee has 17 years in accounting and financial services. Before joining the Vesta Corporate Accounting team in 2020, Skye was responsible for overseeing the accounting in over 200 properties in the residential and commercial industry, as well as serving as a Development Analyst. She specialized in auditing, acquisition and disposition underwriting, due diligence, and construction accounting.

As Controller for our District Management Services Division, Skye oversees our staff accounting team members who are responsible for budgeting and forecasting and financial statement accounting as well as construction accounting. She oversees Accounts Payable, Accounts Receivable and our Payroll Services.

### Patricia Kehr Account Manager



Ms. Kehr has over 30 years of Governmental accounting experience, ranging from the Federal Government to Municipalities to Community Development Districts. Before joining Vesta, she worked for the Dept. of Defense, the Dept. of Justice, and a County in Florida.

Her responsibilities have included handling several major funds and the fixed assets on behalf of a large municipality. She conducted annual fixed asset training and annual Disaster Assessment training. Ms. Kehr was part of the accounting team that prepared the Comprehensive Annual Financial Report for the County for eleven years.

Ms. Kehr is well-versed in GAAP and GASB Standards, FEMA accounting requirements, financial analysis and reporting, and GL reconciliation.

### Jacquelyn Leger Senior Administrator



Ms. Leger is responsible for managing our Special Districts Administration Department. She oversees all the administrative responsibilities including the departments records management procedures and implementation guidelines through the State of Florida, Division of Library and Information Services and Bureau of Archives and Records Management.

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# CORPORATE TEAM

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## David Surface Chief Executive Officer



David has been the CEO of Vesta since 2020, overseeing the company's executive team and day-to-day operations. During the past decade, he has been significantly responsible for Vesta's strong growth by spearheading our mergers-and-acquisitions and strategic partnerships. As a result, Vesta has tripled in size during this period and achieved widespread recognition as a leading, full-service property management company in Florida.

His career experience includes all aspects of real estate, both commercial as well as residential. Prior to joining Vesta, David was managing partner for a real estate finance, management, and brokerage company serving institutional clients

## Daniel Armstrong Chief Financial Officer



Dan oversees the financial and administrative functions of Vesta's corporate entity. His career has included the performance and oversight of accounting, administrative services, and financial reporting for a range of entities, from large corporations following SEC requirements, to not-for-profit associations, clubs and trusts which serve many of our clients, and special-purpose entities that provide financing for purchasing related association facilities.

Dan started as a Florida CPA at Deloitte & Touche in 1993, specializing in the audits of publicly traded and real estate clients. He joined Vesta as Controller in 2001.

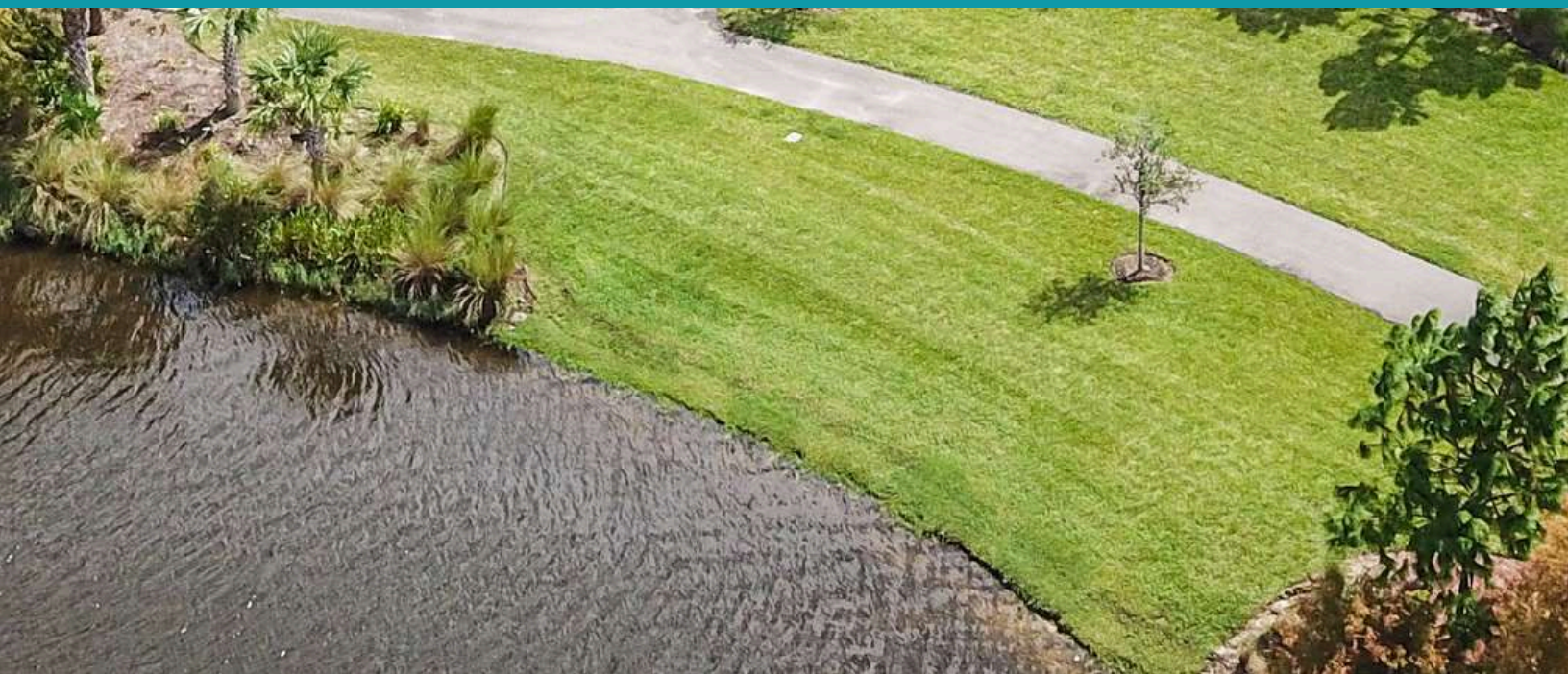
## Chrissy Richie Chief Accounting Officer



Christine was appointed Corporate Controller for Vesta Property Services in June 2013, overseeing accounting and human resources functions. She previously served as CFO for a multimillion-dollar healthcare provider operating in 14 states. With over 25 years of leadership experience, Christine has built financial infrastructure for multiple start-ups, including accounting systems, compliance, risk management, employee benefits, and organizational development.



# COST AND REFERENCES



# FEE SCHEDULE FOR VESTA'S PROPOSED SCOPE OF SERVICES:

SERVICE OPTION	ANNUAL INVESTMENT
DISTRICT MANAGEMENT SERVICES	\$37,000
FIELD MANAGEMENT	\$12,000
<b>TOTAL</b>	<b>\$49,000</b>

**District Management Pricing Operations Pricing Detail**

District Management Operations pricing is all-inclusive, and services are described below. There are no additional costs for project management, RFP management, records storage, or other work contained in the scope of services. Information related to the number of included meetings and their duration can be found under "Additional District Meetings." Any extra-cost items, such as postage and freight, are detailed below as well. There are no transition or on-boarding fees required.

**Assessment Administration Services Include:**

Preparation of the assessment roll and the timely submittal of the roll to the tax collector. Certification, direct billing, and funding request processing, as well as responding to property owner and realtors for Estoppel letters, bond payoff information and other collection related work.

## SCHEDULE OF ADDITIONAL SERVICES OFFERED AND FEE-SCHEDULE

### Information Technology & Website Administration:

- Initial work to migrate, host the website and pages.
- Ensure updated district documentation and contacts are posted on a monthly bases.

NOTE: All annual fees for the Services listed above shall be billed on a monthly basis in 12 monthly installments. Any fees for additional services will be billed following services rendered.

1. **Additional District Meetings:** The Fees proposed are based upon the District holding up to twelve (12) regular meetings and one (1) budget workshop each year, that each last up to four (4) hours in length.
  - \$175/hour: An additional \$175/hour fee will be billed to the District, for each hour past the initial 4-hour meeting timeframe included in this proposal.
  - \$800 per meeting: Additional meetings or workshops outside of the aforementioned amount will be billed at a total fee of \$800 per meeting.
2. **Postage and freight are not included in this proposal.**
3. **Debt Service Fund Accounting & Assessment Collection Services:** If the District issues additional debt, the proposed fee for these services would be \$5,500 annually per bond issue.
4. **Assessment Methodology Consultant Services (Special Methodology Reports):**
  - New Bond Issuance Fee: \$25,000 per new bond issuance.
  - Refinance Fee: \$15,000 per bond refinance
  - Bond Anticipation Notes: \$15,000 per issuance.
5. **Additional Services:** Should Vesta Property Services, Inc. be requested to provide additional services not covered in this proposal, fees for such services shall be negotiated in accordance with the terms mutually agreed upon by the District and Vesta Property Services, Inc.

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## REFERENCES

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**Project Name/Location:** Avalon Groves/Clermont  
**Contact:** Gene Mestrangeli  
**Contact Email:** [seat5@avalongrovescdd.com](mailto:seat5@avalongrovescdd.com)  
**Contact Phone:** (630) 638-8658  
**Project Type:** Planned community of 1750 homes  
**Dollar Amount of Contract:** \$54,000  
**Scope of Services for Project:** District and Field Management  
**Dates Serviced:** April 2016 - Present

**Project Name/Location:** Heritage Harbor CDD/Lutz, Florida  
**Contact:** Shelley Grandon  
**Contact Email:** [shelleygrandon@proassurance.com](mailto:shelleygrandon@proassurance.com)  
**Contact Phone:** (813) 205-5229  
**Project Type:** Planned community of 669 homes  
**Dollar Amount of Contract:** \$80,000  
**Scope of Services for Project:** District Management  
**Dates Serviced:** February 2016 - Present

**Project Name/Location:** Marshall Creek CDD/St. Augustine, Florida  
**Contact:** Dr. Howard Entman, Chairman  
**Contact Phone:** (901) 230-0922  
**Contact Email:** [hentmanmd@gmail.com](mailto:hentmanmd@gmail.com)  
**Project Type:** Planned community of 1,500 homes  
**Dollar Amount of Contract:** \$109,840  
**Scope of Services for Project:** District Management, General Manger and Assistant General Manager  
**Dates Serviced:** June 2023 - Present

**Project Name/Location:** Fleming Island Plantation CDD/Clay County, FL  
**Contact:** Mike Cella  
**Contact Email:** [MCella@fipcommunity.com](mailto:MCella@fipcommunity.com)  
**Project Type/Description:** CDD of 2,400 homes  
**Dollar Amount of Contract:** \$773,743  
**Scope of Services for Project:** Amenity Management, District Management, Field Operations Management, Facility Maintenance Services, and Lifestyle Programs & Events.  
**Dates Serviced:** June 2024 - Present



# CERTIFICATES OF INSURANCE





# CERTIFICATES OF INSURANCE

CERTIFICATE OF LIABILITY INSURANCE
DATE (MM/YY/YYYY)  
08/01/2025

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

If this certificate is being prepared for a party who has an insurable interest in the property, do not use this form. Use ACORD 27 or ACORD 28.

<b>PRODUCER</b> Associations Insurance Agency, Inc. 2301 N Greenville Richardson, TX 75081	<b>CONTACT NAME:</b> Associations Insurance Agency, Inc. <b>PHONE:</b> (866) 384-8579 <b>FAX:</b> (214) 751-2390 <b>E-MAIL ADDRESS:</b> CertificateRequest@AssociationsInsuranceAgency.com <b>PRODUCER CUSTOMER ID:</b> 00003921										
<b>INSURED</b> Vesta Property Services, Inc. (Jacksonville) 245 Riverside Ave, Suite 300 Jacksonville, Florida 32202	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">INSURER(S) AFFORDING COVERAGE</th> <th style="text-align: left;">NAIC #</th> </tr> </thead> <tbody> <tr> <td>INSURER A: Steadfast Insurance Company</td> <td>26387</td> </tr> <tr> <td>INSURER B: Westchester Surplus Lines Insurance</td> <td>10172</td> </tr> <tr> <td>INSURER C: Steadfast Insurance Company</td> <td>26387</td> </tr> <tr> <td>INSURER D: Lexington Insurance Company</td> <td>19437</td> </tr> </tbody> </table>	INSURER(S) AFFORDING COVERAGE	NAIC #	INSURER A: Steadfast Insurance Company	26387	INSURER B: Westchester Surplus Lines Insurance	10172	INSURER C: Steadfast Insurance Company	26387	INSURER D: Lexington Insurance Company	19437
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SPECIAL CONDITIONS / OTHER COVERAGES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)

Certificate Holder is an Additional Insured, with respects to the GL Policy, per written contract.

<b>CERTIFICATE HOLDER</b>  * Insurance Verification	<b>CANCELLATION</b> SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE  <div style="text-align: right; margin-right: 50px;">                       Dana Hodge                 </div>
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**COMMENTS / REMARKS**


- CERTIFICATE OF LIABILITY INSURANCE CONT.

B: Excess Liability  
**Westchester Surplus Lines Insurance Company**  
Policy # G48756451 001  
Effective: 8/1/2025 - 8/1/2026  
Each Occurrence Limit: \$2,000,000

C: Excess Liability  
**Steadfast Insurance Company**  
Policy # AEC 8659280-00  
Effective: 8/1/2025 - 8/1/2026  
Each Occurrence: \$3,000,000

D: Excess Liability  
**Lexington Insurance Company**  
Policy # 020744122  
Effective: 8/1/2025 - 8/1/2026  
Each Occurrence: \$3,000,000

# CERTIFICATES OF INSURANCE



## CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/YYYY)  
08/01/2025

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If this certificate is being prepared for a party who has an insurable interest in the property, do not use this form. Use ACORD 27 or ACORD 28.

<b>PRODUCER</b> Associations Insurance Agency, Inc. 2301 N Greenville Richardson, TX 75081	<b>CONTACT NAME:</b> Associations Insurance Agency, Inc. <b>PHONE:</b> (866) 384-8579 <b>FAX:</b> (214) 751-2390 <b>E-MAIL ADDRESS:</b> Info@AssociationsInsuranceAgency.com <b>PRODUCER CUSTOMER ID:</b> 00003921														
<b>INSURED</b> Vesta Property Services, Inc. (Jacksonville) 245 Riverside Ave, Suite 300 Jacksonville, Florida 32202	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">INSURER(S) AFFORDING COVERAGE</th> <th style="text-align: left;">NAIC #</th> </tr> </thead> <tbody> <tr> <td>INSURER A: Federal Insurance Company</td> <td>20281</td> </tr> <tr> <td>INSURER B:</td> <td></td> </tr> <tr> <td>INSURER C:</td> <td></td> </tr> <tr> <td>INSURER D:</td> <td></td> </tr> <tr> <td>INSURER E:</td> <td></td> </tr> <tr> <td>INSURER F:</td> <td></td> </tr> </tbody> </table>	INSURER(S) AFFORDING COVERAGE	NAIC #	INSURER A: Federal Insurance Company	20281	INSURER B:		INSURER C:		INSURER D:		INSURER E:		INSURER F:	
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**COVERAGES**


**CERTIFICATE NUMBER:**

**REVISION NUMBER:**

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INSR LTR	TYPE OF INSURANCE	ADDL INSD	SURR WVO	POLICY NUMBER	POLICY EFF DATE (MM/DD/YYYY)	POLICY EXP DATE (MM/DD/YYYY)	LIMITS
	<input type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PROJECT <input type="checkbox"/> LOC OTHER:						EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea. occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMP/OP AGG \$ \$
	<input type="checkbox"/> AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> SCHEDULED ALTR <input type="checkbox"/> HIRED AUTOS <input type="checkbox"/> NON-OWNED AUTOS <input type="checkbox"/> UMBRELLA LIAB <input type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED    RETENTION						COMBINED SINGLE LIMIT (Ea. accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ EACH OCCURRENCE \$ AGGREGATE \$ \$
	<input type="checkbox"/> WORKERS COMPENSATION AND EMPLOYERS LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	N/A					PER STATUTE    OTH-ER \$ E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
A.	EXECUTIVE RISK PACKAGE			82622087	8/1/2025	8/1/2026	See Page 2 for Policy Limits & Deductibles

SPECIAL CONDITIONS / OTHER COVERAGES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)

<b>CERTIFICATE HOLDER</b>  * Insurance Verification	<b>CANCELLATION</b> SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE  <div style="text-align: right; margin-top: 10px;">                       Dana Hodge                 </div>
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**COMMENTS / REMARKS**

EXECUTIVE RISK PACKAGE

**A. Federal Insurance Agency**

Policy #: 82622087  
Effective: 08/01/2025 - 08/01/2026  
Management Liability and Company Reimbursement (Directors and Officers Liability)  
•\$3,000,000 Aggregate Limit of Liability  
•\$250,000 Retention per Loss  
•02/02/2001 Retroactive Date  
Employment Practices Liability  
•\$3,000,000 Aggregate Limit of Liability  
•\$350,000 Retention per Loss  
•02/02/2001 Retroactive Date  
Pension & Welfare Benefit Plan Fiduciary Liability  
•\$3,000,000 Aggregate Limit of Liability  
•\$1,000 Retention per Loss  
•02/02/2001 Retroactive Date  
Subject to the terms and conditions stated in the policy.

# CERTIFICATES OF INSURANCE



## CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/YY/YYY)  
**08/01/2025**

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**COVERAGES**

**CERTIFICATE NUMBER:**

**REVISION NUMBER:**

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A	MISC PROFESSIONAL LIABILITY			FRL-R-9-PL-00003420-01	9/14/2024	9/14/2025	See Page 2 for Policy Limits & Deductibles
B	MISC EXCESS PROFESSIONAL LIABILITY			REX9083142-0924	9/14/2024	9/14/2025	

SPECIAL CONDITIONS / OTHER COVERAGES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)

**CERTIFICATE HOLDER**  
  

- Insurance Verification

**CANCELLATION**  
 SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  
  
 AUTHORIZED REPRESENTATIVE  
  

  
 Dana Hodge

ACORD 25 (2009/09)

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**COMMENTS / REMARKS**

MISCELLANEOUS PROFESSIONAL LIABILITY

**B. HDI Global Specialty SE** - \$5,000,000  
Policy #: FRL-W-P-PL-00003420-01

**C. Nautilus Insurance Company** - \$5,000,000 Excess of \$5,000,000  
Policy #: REX9083142-0924  
Effective: 09/14/2024 - 09/14/2025

Limit of Liability  
•\$10,000,000 Each Loss  
•\$10,000,000 Aggregate  
•\$1,000,000 Retention per Loss  
•01/25/2002 Retroactive Date

Description of Covered Professional Services:  
Property Owner Association Management including but not limited to the following services:  
Property manager, real estate agent/broker, publishing, media services, website administration, fire  
watch services, crime prevention training, bookkeeping and tax preparation services other than those  
for which a CPA license is required

# CERTIFICATES OF INSURANCE



## CERTIFICATE OF PROPERTY INSURANCE

DATE (MM/YYYY)  
08/01/2025

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**If this certificate is being prepared for a party who has an insurable interest in the property, do not use this form. Use ACORD 27 or ACORD 28.**

<b>PRODUCER</b> Associations Insurance Agency, Inc. 2301 N Greenville Richardson, TX 75081	<b>CONTACT NAME:</b> Associations Insurance Agency, Inc. <b>PHONE:</b> (866) 384-8579 <b>FAX:</b> (214) 751-2390 <b>E-MAIL ADDRESS:</b> CertificateRequest@AssociationsInsuranceAgency.com <b>PRODUCER CUSTOMER ID:</b> 00003921														
<b>INSURED</b> Vesta Property Services, Inc. (Jacksonville) 245 Riverside Ave, Suite 300 Jacksonville, Florida 32202	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 80%;">INSURER(S) AFFORDING COVERAGE</th> <th style="width: 20%;">NAIC #</th> </tr> </thead> <tbody> <tr> <td>INSURER A: Philadelphia Indemnity Insurance</td> <td>18058</td> </tr> <tr> <td>INSURER B: Beazley Insurance Company, Inc.</td> <td>37540</td> </tr> <tr> <td>INSURER C:</td> <td></td> </tr> <tr> <td>INSURER D:</td> <td></td> </tr> <tr> <td>INSURER E:</td> <td></td> </tr> <tr> <td>INSURER F:</td> <td></td> </tr> </tbody> </table>	INSURER(S) AFFORDING COVERAGE	NAIC #	INSURER A: Philadelphia Indemnity Insurance	18058	INSURER B: Beazley Insurance Company, Inc.	37540	INSURER C:		INSURER D:		INSURER E:		INSURER F:	
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**COVERAGES      CERTIFICATE NUMBER:      REVISION NUMBER:**

**LOCATION OF PREMISES / DESCRIPTION OF PROPERTY (Attach ACORD 101, Additional Remarks Schedule, if more space is required)**

**THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.**

INSR LTR	TYPE OF INSURANCE	POLICY NUMBER	POLICY EFF DATE (MM/DD/YYYY)	POLICY EXP DATE (MM/DD/YYYY)	COVERED PROPERTY	LIMITS		
<b>A</b>	<input checked="" type="checkbox"/> <b>PROPERTY</b>	PPK2589388-010	8/1/2025	8/1/2026	BUILDING	\$		
	CAUSES OF LOSS				DEDUCTIBLES			
	BASIC				BUILDING	25,000	PERSONAL PROPERTY	\$
	BROAD						BUSINESS INCOME	\$
	SPECIAL				CONTENTS		EXTRA EXPENSE	\$
	EARTHQUAKE						RENTAL VALUE	\$
	NAMED WIND						BLANKET BUILDING	\$
	FLOOD						BLANKET PERS PROP	\$
	WATER						<input checked="" type="checkbox"/> BLANKET BLDG & PP	\$ 554440
	WPH DED BB						<input checked="" type="checkbox"/> ICE DAMMING DED.	\$
			WIND & HAIL DED.	\$ 25,000				
	<b>INLAND MARINE</b>	TYPE OF POLICY:			\$			
	CAUSES OF LOSS	POLICY NUMBER:			\$			
	NAMED PERILS				\$			
					\$			
<b>B</b>	<input checked="" type="checkbox"/> <b>CRIME</b>	V282C2240701	8/1/2025	8/1/2026	<input checked="" type="checkbox"/> LIMIT OF LIABILITY	\$ 10,000,000		
	TYPE OF POLICY				<input checked="" type="checkbox"/> DEDUCTIBLE PER LOSS	\$ 150,000		
	<b>BOILER &amp; MACHINERY / EQUIPMENT BREAKDOWN</b>				LIMIT:	\$		

**SPECIAL CONDITIONS / OTHER COVERAGES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)**

<b>CERTIFICATE HOLDER</b>  • Insurance Verification	<b>CANCELLATION</b> SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE  <div style="text-align: right;">                       Dana Hodge                 </div>
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# CERTIFICATES OF INSURANCE

<b>ACORD</b> <sub>TM</sub>	Client#: 97496	ASSOCIA	DATE (MM/DD/YYYY) 8/01/2025			
<b>CERTIFICATE OF LIABILITY INSURANCE</b>						
<p>THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.</p> <p><b>IMPORTANT:</b> If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer any rights to the certificate holder in lieu of such endorsement(s).</p>						
<b>PRODUCER</b> USI Southwest 9811 Katy Freeway, Suite 500 Houston, TX 77024 713 490-4600	<b>CONTACT NAME:</b> Luis Garcia <b>PHONE (A/C, No, Ext):</b> 713 490-4600 <b>FAX (A/C, No):</b> 713-490-4700 <b>E-MAIL ADDRESS:</b> luis.garcia@usi.com					
<b>INSURED</b> Vesta Property Services, Inc. 245 Riverside Avenue, Suite 300 Jacksonville, FL 32202	<b>INSURER(S) AFFORDING COVERAGE</b> INSURER A: Sentry Insurance Company <b>NAIC #</b> 24988 INSURER B: INSURER C: INSURER D: INSURER E: INSURER F:					
<b>COVERAGES</b>		<b>CERTIFICATE NUMBER:</b>				
THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.		<b>REVISION NUMBER:</b>				
INSR LTR	TYPE OF INSURANCE	ADDL SUBR INSR YWVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PROJ. <input type="checkbox"/> LOC <input type="checkbox"/> OTHER:					EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Per occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMP/OP AGG \$
A	AUTOMOBILE LIABILITY		9017993003 (AOS)	08/01/2025	08/01/2026	COMBINED SINGLE LIMIT (Per accident) \$5,000,000
A	<input checked="" type="checkbox"/> ANY AUTO OWNED AUTOS ONLY <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> Drive Oth Car  <input type="checkbox"/> UMBRELLA LIAB <input type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> DED <input type="checkbox"/> RETENTION \$		9017993005 (MA)	08/01/2025	08/01/2026	BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ EACH OCCURRENCE \$ AGGREGATE \$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE/OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y / N N / A				PER STATUTE <input type="checkbox"/> <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
A	HIRED AUTO		9017993003 (AOS)	08/01/2025	08/01/2026	\$1,000 COMP DED
A	PHYSICAL DAMAGE		9017993005 (MA)	08/01/2025	08/01/2026	\$1,000 COLL DED \$50,000 MAX LIMIT
DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)						
The Automobile policy includes an Automatic Blanket Additional Insured endorsement that provides additional insured status to the certificate holder only when there is a written contract between the named insured and certificate holder that requires such status.  (See Attached Descriptions)						
<b>CERTIFICATE HOLDER</b>				<b>CANCELLATION</b>		
For Informational Purposes Only				SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.		
				AUTHORIZED REPRESENTATIVE 		
© 1988-2015 ACORD CORPORATION. All rights reserved.						
ACORD 25 (2016/03) 1 of 2 #S50334249/M50329182		The ACORD name and logo are registered marks of ACORD		VACZP		

**DESCRIPTIONS (Continued from Page 1)**

The Automobile Liability policy also includes an endorsement with Primary and Non-Contributory wording, as required by written contract.

The Automobile policies include Blanket Waiver of Subrogation endorsements that provide this coverage only when there is a written contract between the Named Insured and the certificate holder that requires it.

# CERTIFICATES OF INSURANCE



## CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
1/9/2025

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

<b>PRODUCER</b> Arthur J. Gallagher Risk Management Services, LLC 501 Riverside Ave Suite 1000 Jacksonville FL 32202	<b>CONTACT NAME:</b> Jessica Goff <b>PHONE (A/C No. Ext):</b> 904-548-2301 <b>FAX (A/C. No.):</b> 904-634-1302 <b>E-MAIL ADDRESS:</b> Jessica_Goff@ajg.com														
<b>INSURED</b> Vesta Property Services, Inc. 245 Riverside Avenue Suite 300 Jacksonville FL 32202	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">INSURER(S) AFFORDING COVERAGE</th> <th style="text-align: left;">NAIC #</th> </tr> </thead> <tbody> <tr> <td>INSURER A: Accident Fund Insurance Company of America</td> <td>10165</td> </tr> <tr> <td>INSURER B:</td> <td></td> </tr> <tr> <td>INSURER C:</td> <td></td> </tr> <tr> <td>INSURER D:</td> <td></td> </tr> <tr> <td>INSURER E:</td> <td></td> </tr> <tr> <td>INSURER F:</td> <td></td> </tr> </tbody> </table>	INSURER(S) AFFORDING COVERAGE	NAIC #	INSURER A: Accident Fund Insurance Company of America	10165	INSURER B:		INSURER C:		INSURER D:		INSURER E:		INSURER F:	
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**COVERAGES**      **CERTIFICATE NUMBER:** 1173730610      **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDITIONAL INSURED	POLICY NUMBER	POLICY EFF. (MM/DD/YYYY)	POLICY EXP. (MM/DD/YYYY)	LIMITS
	<b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PROJ-ECT <input type="checkbox"/> LOC OTHER:					EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMPROP AGG \$ \$
	<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY <input type="checkbox"/> AUTOS ONLY					COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	<input type="checkbox"/> UMBRELLA LIAB <input type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED    RETENTION \$					EACH OCCURRENCE \$ AGGREGATE \$ \$
A	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER MEMBER EXCLUDED? (Mandatory in RI) If yes, describe under DESCRIPTION OF OPERATIONS below	Y    I    N <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> N/A	100374418	1/1/2025	1/1/2026	X PER STATUTE    OTH-ER E.L. EACH ACCIDENT    \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE    \$ 1,000,000 E.L. DISEASE - POLICY LIMIT    \$ 1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

<b>CERTIFICATE HOLDER</b>  <div style="text-align: center; border: 1px solid black; padding: 5px;">Proof Of Coverage</div>	<b>CANCELLATION</b> SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE <div style="text-align: center;"> </div>
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# CERTIFICATES OF INSURANCE

<b style="font-size: 1.2em;">CERTIFICATE OF LIABILITY INSURANCE</b>		DATE (MM/YYYY) 03/17/2025																																																																													
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<b>PRODUCER</b>  Associations Insurance Agency, Inc. 5401 North Central Expressway, Suite 315 Dallas, TX 75205	<b>CONTACT NAME: Associations Insurance Agency, Inc.</b> PHONE: (866) 384-8579      FAX: (214) 751-2390 E-MAIL ADDRESS: <a href="mailto:Info@AssociationsInsuranceAgency.com">Info@AssociationsInsuranceAgency.com</a> PRODUCER CUSTOMER ID: 00003921																																																																														
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<b>CERTIFICATE HOLDER</b>  Insurance Verification	<b>CANCELLATION</b>  SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE   Dana Hodre																																																																														
ACORD 25 (2009/09)      © 1995-2009 ACORD CORPORATION. All rights reserved.      The ACORD name and logo are registered marks of ACORD																																																																															

## COMMENTS / REMARKS

Policy Aggregate Limit of Liability: \$2,000,000

### A. Information Privacy

- A.1. Information Privacy Liability: Limit \$2,000,000 Retention \$15,000
- A.2. Regulatory Liability: Limit \$2,000,000 Retention \$15,000
- A.3. Event Response and Management: Limit \$2,000,000 Retention \$15,000
- A.4. PCI-DSS Liability: Limit \$2,000,000 Retention \$15,000

### B. Network Security

- B.1. Network Security Liability: Limit \$2,000,000 Retention \$15,000
- B.2. Event Response and Recovery: Limit \$2,000,000 Retention \$15,000

### C. Business Interruption

- C.1. Direct Business Interruption: Limit \$2,000,000 Retention \$15,000
- C.2. Contingent Business Interruption: Limit \$2,000,000 Retention \$15,000

### D. Cyber Extortion

- D.1. Cyber Extortion: Limit \$2,000,000 Retention \$15,000

### E. Financial Fraud

- E.1. Social Engineering: Limit \$100,000 Retention \$15,000
- E.2. Computer Fraud: Limit \$100,000 Retention \$15,000

### F. Media Content

- F.1. Media Liability: Limit \$2,000,000 Retention \$15,000
- F.2. Media Event Response: Limit \$2,000,000 Retention \$15,000

### G. Reputational Harm

- G.1. Reputational Harm: Limit \$2,000,000 Retention \$15,000

### System Failure Coverage Details:

- Direct System Failure Limit: \$2,000,000
- Contingent System Failure Limit: \$2,000,000
- System Failure Waiting Period: 8 hours
- Contingent Non-IT Provider Business Interruption Limit: \$1,000,000
- Contingent Non-IT Provider System Failure Limit: \$1,000,000



Vesta  
DISTRICT SERVICES™

## Contact Us

250 International Pkwy #208  
Lake Mary, FL 32746  
(321) 263-0132





Rizzetta & Company  
Professionals in Community Management



# PROPOSAL

Suncoast Community Development District

Prepared for: Board of Supervisors

## REGIONAL OFFICE

5844 Old Pasco Road, Suite 100

Wesley Chapel, FL 33544

813.994.1001 | rizzetta.com

FIRSTLY

THANK YOU

FOR CONSIDERING US!



Rizzetta & Company  
Professionals in Community Management

April 1, 2026

Matthew Thebeau  
Chairman  
Suncoast CDD

RE: Community Development District Management Services

Dear Matthew,

Rizzetta & Company appreciates the opportunity to present our qualifications to serve as District Manager for Suncoast Community Development District. With 39 years of experience and a state-wide presence, we are prepared to handle all present and future projects for the district.

As one of the largest providers of district management services, we are uniquely qualified to understand the complexities of managing a community development district. Our proposal outlines a knowledgeable team, including Matthew Huber our Director of District Services as Transition District Manager, and a large team of district services professionals to ensure transition and daily operations run smoothly.

Even though you may only see your district manager at your meetings, your district would be supported by three accounting professionals, a financial associate, and a dedicated administrative assistant. So, you would have a team of seven that would work for your district on nearly a daily basis. All those professionals take immense pride in their work to ensure that your district always remains in compliance and fulfills all its obligations.

Thank you for your time and consideration of our proposal. We look forward to meeting with you and the Board of Supervisors to review and discuss our proposal in detail. Should you have any questions or require additional information, please feel free to contact Scott Brizendine at [sbrizendine@rizzetta.com](mailto:sbrizendine@rizzetta.com)

Very truly yours,

Scott Brizendine  
Vice President of Operations



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# OUR STORY

## ... SO FAR

Rizzetta & Company is a Florida-based professional community management and consulting firm that provides services to residential and commercial communities throughout the state of Florida. With over 40 years in the industry, Rizzetta & Company, is staffed with highly experienced managers and support staff. Each of our nine offices throughout Florida has a team of employees with diverse backgrounds, both personally and professionally, who provide the highest quality services to our clients.

Rizzetta & Company was founded in 1986 in Tampa, Florida by William Rizzetta. The original focus of the Company was to provide professional assessment consulting services for Community Development Districts in association with the issuance of bonds. As the Company’s reputation for excellent work and customer service grew, the practice expanded over the next thirty years by adding related services which resulted in today’s “Full Service” organization.

## OFFICE LOCATIONS

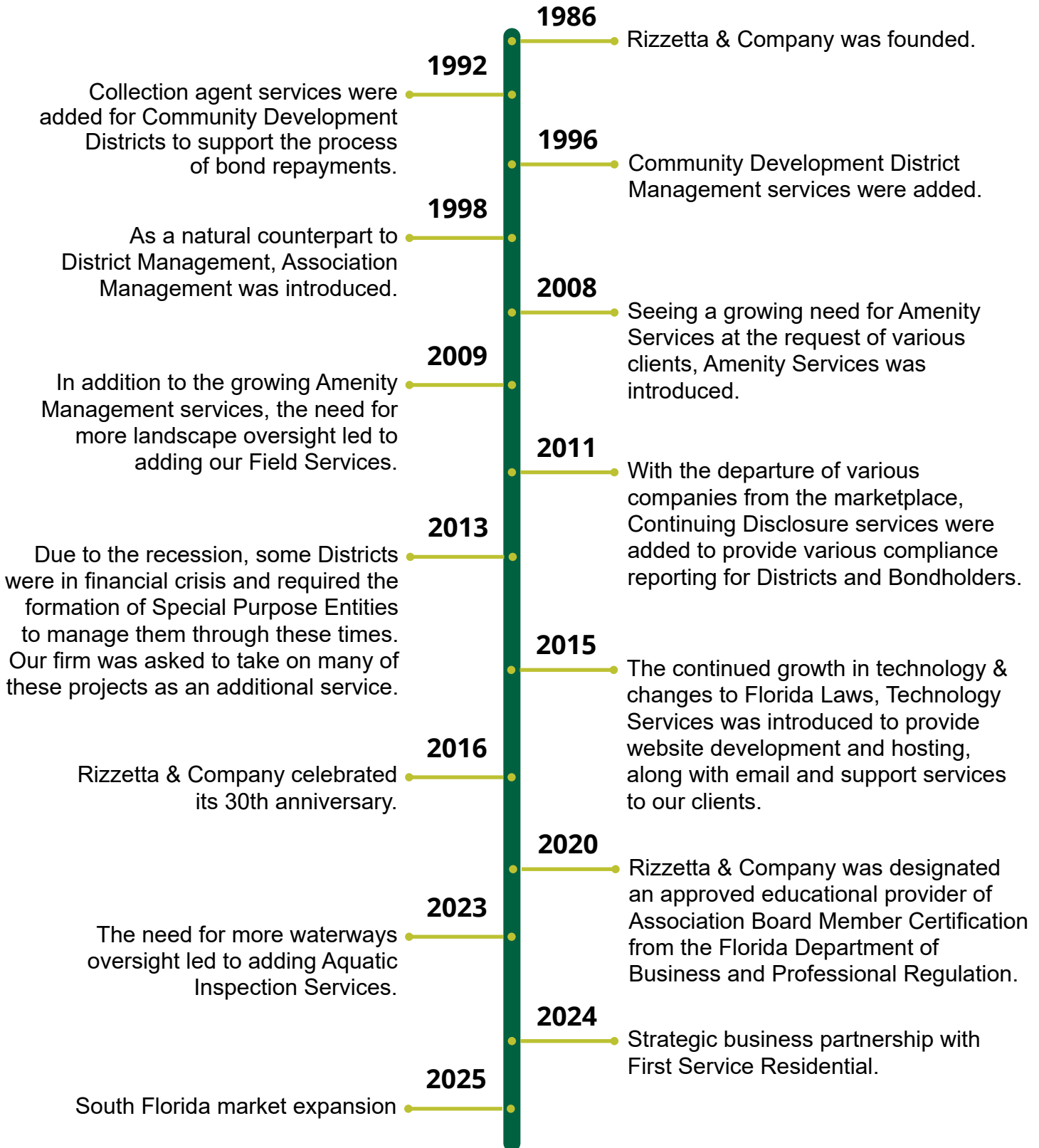


### HEADQUARTERS

3434 Colwell Avenue, Suite 200  
Tampa, FL 33614



# OUR MILESTONES





# BY THE NUMBERS



40  
YEARS OF  
EXPERIENCE  
EST. 1986



150+  
ASSOCIATION  
SERVICES  
CLIENTS



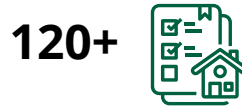
55  
ASSOCIATION  
SERVICES TEAM  
MEMBERS



20+  
AMENITY  
SERVICES  
CLIENTS



100  
AMENITY  
SERVICES TEAM  
MEMBERS



120+  
DISTRICT  
SERVICES  
CLIENTS

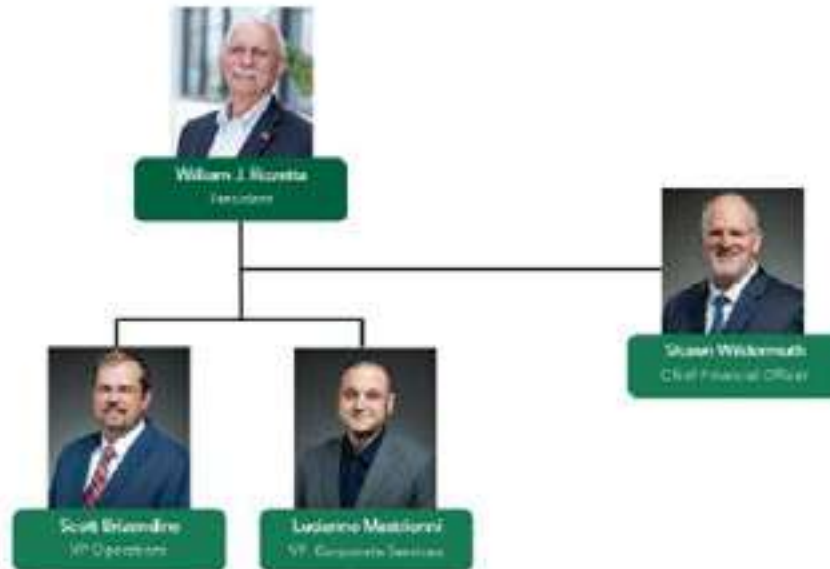


50  
DISTRICT  
SERVICES TEAM  
MEMBERS





# ORGANIZATIONAL CHART



## COMMUNITY DEVELOPMENT DISTRICT LEADERSHIP





# DISTRICT SERVICES

**STRESS FREE**

**MANAGEMENT**

**FOR YOUR DISTRICT**



# AREAS OF SERVICE

Rizzetta & Company would provide professional district management services to Suncoast CDD pursuant to Chapter 190, Florida Statutes. A brief description of these services is provided below:

## Management

- Attend and conduct all regularly scheduled and special Board of Supervisors meetings, continued meetings, and workshops.
- Arrange for time and location and all other necessary logistics for such meetings.
- Ensure compliance with all statutes affecting the district which include but are not limited to:
  - » Assist in the negotiation of contracts, as directed by the Board of Supervisors.
  - » Advise the Board on the status of negotiations as well as contract provisions and their impacts on the District.
  - » Make recommendations on contract approval, rejection, amendment, renewal, and cancellation. In advance of expiration of contracts, advise the Board as to need for renewal or additional procurement activities and implement same.
  - » Monitor certificates of insurance as needed per contracts.
- District Manager will perform one monthly site inspection and will meet with vendors as needed.
- Review and create as needed a periodic maintenance schedule for District assets.

The District Manager is not a role filled by an individual, rather it is a commitment by a team of motivated and skilled employees. We recognize that our role is more than an individual orchestrating a Board meeting. It is to ensure the District is fully compliant with statutory requirements and managed effectively and efficiently. Given Rizzetta's physical footprint across the state and extensive staffing resources, we are uniquely qualified to respond to the needs of your District.

## Administrative

- Prepare agendas for Board of Supervisors meetings.
- Provide accurate minutes for all meetings and hearings.
- Implement and maintain a document management system to create and save documents, and provide for the archiving of District documents per general records schedule GS1-SL.
- Certify and file the annual report to the Department of State, Library and Archive Division, for storage and disposal of public records.
- Protect integrity of all public records in accordance with the requirements of State law. Respond to public records requests as required by law and in compliance with the Rules of Procedure and the District's adopted public records policy.



Rizzetta has been electronically providing agendas to our Boards for a number of years resulting in substantial savings in printing costs to the Districts. We go one step further by providing electronic tablets to Board member for use during the meetings. This approach also allows immediate posting on the CDD website as required by statute. Audio recordings of the board meetings are stored on our Raid 5 disk array which is redundantly backed up to both a local and cloud storage appliance.

## **Accounting**

Services include the monthly preparation of the District's financial statements in accordance with Governmental Accounting Standards, accounts payable and accounts receivable functions, asset tracking, investment tracking, capital program administration and requisition processing, filing of annual reports required by the State of Florida and monitoring of trust account activity.

Rizzetta uses Sage Intacct Fund Accounting software that is designed specifically for governmental fund accounting. Our accounting processes have multi-level reviews to ensure proper internal control and accuracy. The result of our accounting infrastructure is an industry recognition by auditing firms that the books and records of Rizzetta managed districts are exceptional.

## **Financial & Revenue Collection**

Services include all functions necessary for the timely billing, collection and reporting of District assessments in order to ensure adequate funds to meet the District's debt service and operations and maintenance obligations.

Our staff has significant expertise in assessment roll preparation and required certification to county Property Appraiser offices. Because of our experience, we enjoy a great relationship with those staff throughout the state. In addition, the required direct billings for property not on the tax roll are managed in concert with the same familiar staff.

We are organized to efficiently respond to property owner questions regarding District assessments and issue estoppel letters and lien releases as needed for property transfers

## **Bond Issuance Services**

When the District is ready for a major augmentation that may require additional bonds; we can help by:

Preparing a Special Assessment Allocation Report;

- a) Prepare benefit analysis based on infrastructure to be funded with bond proceeds.
- b) Prepare Preliminary Special Assessment Allocation Report and present to District board and staff.
- c) Present Final Special Assessment Allocation Report to board and staff at noticed public hearing levying special assessments.



Bond Validation;

- d) Coordinate the preparation of a Bond Validation Report which states the “Not-to exceed” par amount of bonds to be issued by the District and present to board as part of the Bond Resolution.
- e) Provide expert testimony at bond validation hearing in circuit court.

Certifications and Closing Documents;

- f) Prepare or provide signatures on all closing documents, certificates or schedules related to the bond issue that are required by District Manager or District Assessment Methodology Consultant.

Because providing bond issuance services was the cornerstone on which Rizzetta was founded, our expertise in this area is unparalleled. The special assessment allocation methodology report has been continually refined over the years to reflect new financing methods that are acceptable to the industry.

### **Field Services**

Our Field Services team provides the expertise needed for a well-planned, well-maintained community landscape. Our field experts conduct monthly inspections to ensure contractors comply with the District’s maintenance contracts. By collaborating with the District Manager, they provide a report for the District’s agenda package, including recommended actions, notify contractors of service deficiencies or additional care needs, and monitor their progress as outlined in the contracts. Our team is committed to elevating the landscape maintenance in your community with detailed inspections, formal reporting, landscape planning, & effective vendor management strategies.

### **Technology Services**

Our Technology Services host District websites for purposes of updating records to ensure the websites remain in compliance with statutory requirements. Having this service under the same roof as District Management ensures details are not missed and critical filings are consistently observed. A third-party vendor performs the ADA mediation of the website. We also host and archive District specific e-mail accounts, if necessary.



# TECHNOLOGY TOOLS & RESOURCES

## Vendor Management Software

As leaders in the industry, we are continually looking for ways to improve the level of service we offer and protect the communities we serve. To enhance our Vendor Compliance Program, we have partnered with [Vendor Information Verification Experts \(VIVE\)](#) as the platform to support the program.

We chose to move vendor vetting to VIVE to ensure consistent compliance amongst similar vendors, speed up the review process, and allow our managers to have real-time information to properly screen vendors for insurance and trade licensing. The choice to engage with a particular vendor will always be in the hands of the board of supervisors. Our goal is to provide our clients with information to help make educated decisions.

## VIVE



## Client Support System

Dedication to our clients is one of the driving principles at Rizzetta & Company. We're here to help our communities thrive and offer support in ways that are convenient for our board of supervisors and residents. Our integrated, client-focused system, helps our staff manage requests across platforms and efficiently connect with internal teams and external partners.

This industry-leading system allows our team to deliver immediate assistance while providing superior customer experience over the phone or e-mail. Making it easier to track, prioritize and streamline the processes to provide faster resolution.

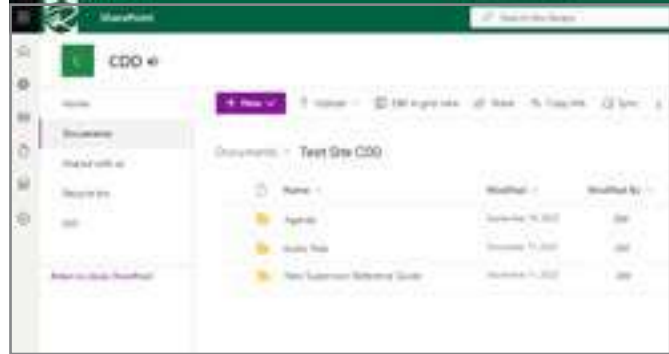




## Document Management System

You're just a click away from what you are looking for with your dedicated SharePoint Site. This web-based collaborative platform will allow you to quickly find District information and share files, data, news, and other resources. SharePoint empowers teamwork, seamlessly integrates with Microsoft Office, and securely connects across PCs, Macs, and mobile devices.

## SHAREPOINT

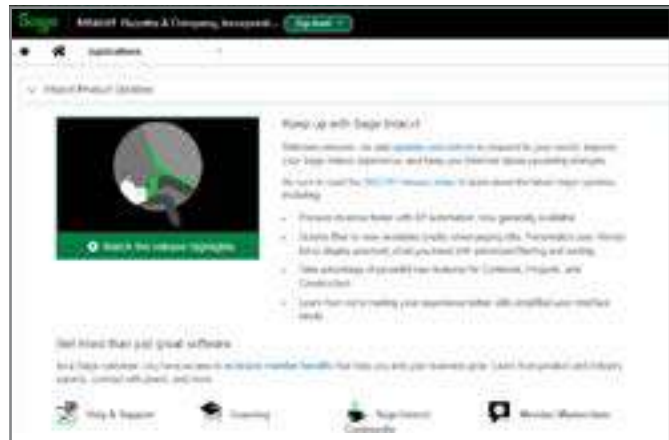


Customize your site to streamline your District's work. Accelerate productivity by transforming processes—from simple tasks like notifications and approvals to complex operational workflows.

## Financial Management Software

Sage Intacct will simplify your accounts payable and payment processes and get convenient, secure access to all your financial information. One District account login provides access to real-time accounting information. Sage Intacct integrates with existing tools and automates processes.

## SAGE INTACCT



- **Accounts payable:** Streamline workflows and see expenses.
- **Cash management:** Track multiple accounts with real-time visibility.
- **Back transactions:** View written checks, deposits, and monthly statements.
- **Financial Statements:** Easily track transactions at anytime from anywhere





## WHY

# CHOOSE US?

Clients choose us because we have the experience to create robust, integrated solutions based on each District's unique needs, budget, and long-term goals.

### *Extensive Experience*

- Rizzetta is the only “**original**” Community Development District Management company continuously providing services to Districts since the first CDD (Tampa Palms) issued bonds in 1986. Today, 38 years later, Bill Rizzetta continues to manage his company on a daily basis. In addition, Rizzetta brings extensive industry knowledge and influence at the legislative level.
- The first District Management company to successfully merge multiple separate CDD's into a unified District.

### *Result-Driven & Client-Focused*

- District Finance team has vast knowledge having been involved in over 250 separate Bond Transactions with total funding exceeding \$3 Billion; served as the Dissemination Agent for over 80 Districts; and prepared over 1,700 Tax Assessment rolls.
- District Accounting staff has been audited over 3,000 times (each District is audited annually) with no findings of internal control issues or fraudulent activity.
- We have established a dual team approach where an assigned Lead District Manager handles daily operations and the 2nd Chair District Manager ensures continuity of service by a qualified District manager when the Lead District Manager is out of the office.
- Client Relations Manager endeavors to relentlessly monitor and enhance our services and exposure to your residents. This aids in pre-empting resident complaints occupying Board proceedings.
- Rizzetta's continuous improvement culture compounded with relentless training of all staff provides for ever increasing levels of service and performance.

### *Training & Infrastructure*

- As part of the transition process, we provide an Onboarding Workshop to go over responsibilities and contracts with Board of Supervisors. We also offer free training sessions to new board members to gain better understanding of how the community should operate.
- Rizzetta made significant investments in its information infrastructure to harden its protection of Public Documents and enhance the electronic communication with Board members. Public documents are now protected with multi-factor authentication, cloud storage, professional patch management and hardware replacement policies.
- Rizzetta introduced “electronic agendas” to Board meetings negating the need to print and bind thousands of pages by providing electronic tablets for Board use during all meetings.



# PROPOSED PRICING

District Services Provided	2026 Budget	2026 Rizzetta
<b>District Management</b>	<b>\$47,895</b>	<b>\$20,240</b>
Attend and Conduct up to 12 Meetings and 1 Budget Workshop per Year. Administration of District Functions. Compliance Management. Budget Prep and Presentation. Implement Policies. Manage District Contracts. Obtain Proposals or Bids. Advise the Board on District Matters. Respond to Inquires from Board, Staff and Public.		
Administrative Fees:		
- For all meetings exceeding 3 hours	\$200/per hour	
- For additional meetings	\$200/per hour	
(includes drafting agenda, meeting attendance, and drafting of minutes)		
<b>Administrative Services</b>		<b>\$3,680</b>
Provide Minutes for All Meetings and Workshops. Public Records Repository. Preparation of 14-day Tentative and 7-day Final Agendas.		
<b>District Accounting</b>		<b>\$13,800</b>
Monthly Financial Package per GASB. Administration of Accounts Payable/Receivable. Asset and Investment Tracking. Audit Support. Filing of Required Reports and Disclosures. Capital Program Administration.		
<b>Annual Finance and Revenue Collections</b>		<b>\$3,680</b>
Estoppel Issuance. Debt Management		
<b>Continuing Disclosure Services</b>	<b>\$4,200</b>	<b>\$1,000</b>
Serve as the Dissemination Agent for All Bond Issuances to ensure Compliance with the Security & Exchange Commission Rule 15c2-12 (\$1,000 for each additional bond issuance)		
<b>Assessment Roll Administration</b>	-	-
Prepare Annual Assessment Rolls and Submit to County Tax Collectors and Property Appraisers. Create and Maintain the Assessment Rolls		
<b>Technology Services</b>	<b>\$1,552</b>	<b>\$1,200</b>
Website Compliance Monitoring and Monthly Content Uploads		
<b>Field Services</b>	<b>\$12,000</b>	<b>\$12,000</b>
Conduct monthly inspections to ensure contractor compliance. Provide reports on deficiencies and recommend action plans.		
<b>TOTAL</b>	<b>\$65,647</b>	<b>\$60,200</b>



# SUNCOAST CDD DEDICATED TEAM MEMBERS

Rizzetta & Company prides itself on the experience and dedication of its collective staff. When you engage Rizzetta, you have a combined group with hundreds of years of experience at your service. Our service includes a two-team District Manager approach and an after-hours answering service so your District has 24/7 coverage. If any escalation is needed, your assigned point of contact is Scott Brizendine, Vice President of Operations.



**Lisa  
Castoria**

## **Lead District District Manager**

Lisa Castoria, District Manager, is a dedicated and results-driven professional with a strong background in leadership. As a District Manager, with two years of experience, assigned to the West and Southwest regions, Lisa has built a reputation for delivering high-quality results while ensuring seamless execution of District objectives. In addition to her experience as a District Manager, her background includes working for The Walt Disney World Company and over 20 years in public education, including roles in school administration, each of which has shaped her leadership, service-oriented mindset, and operational expertise. Her ability to adapt to challenges, think critically, and implement effective solutions has been instrumental in achieving success.

Outside of work, Lisa enjoys spending time with her family, three dogs, traveling, and boating. Lisa values connection, creativity, and finding joy in everyday moments.

Lisa holds graduate degrees in leadership, technology and project management. Lisa continues to stay at the forefront of industry trends to ensure excellence in every initiative. Her commitment to consistent communication, innovation and operational excellence makes her a valuable leader in her field.



**Matt  
Huber**

## **2nd Chair & Director, District Services**

Matthew Huber is the Director of District Services, overseeing the management team in Central and South Florida, which includes offices in Boca Raton, Tampa, Wesley Chapel, and Riverview. Before his appointment, Mr. Huber served as Regional District Manager since August 2020 and is currently responsible for managing six Community Development Districts.



Mr. Huber served as a District Manager in the Tampa office, overseeing a portfolio of Community Development Districts in Pasco, Hillsborough, and Manatee Counties. Prior to that he served as a District Manager in the Wesley Chapel office. Mr. Huber started with Rizzetta & Company, Inc., in 2006 as a District Manager for our Fort Myers area clients in Lee and Collier County.

Prior to joining Rizzetta & Company, Inc., Mr. Huber worked as a Land Development Project Manager with DR Horton in the Fort Myers area. While working as a Land Development Manager, Mr. Huber gained valuable development knowledge that assists him in his management of his Districts. In addition to his development experience, Mr. Huber also has sat as CDD Board member, serving on two CDD Boards as an Assistant Secretary. Prior to working for DR Horton. Mr. Huber interned with the Board of County Commissioners Long Range Planning Department in Polk County. With his experiences working in this department, he has gain valuable insight into government practices.

Mr. Huber received his Degree in Business Administration from the University of South Florida in 2005. He is a Licensed Community Association Manager and Notary Public in the State of Florida.



# IMMEDIATE SUPPORT FOR SUNCOAST CDD

## TEAM MEMBERS



**Lucianno  
Mastrionni**

Luciano Mastrionni is Rizzetta & Company's Vice President of Business Operations. Luciano oversees and supports all business operations across every line of service at Rizzetta & Company. His responsibilities include guiding the organization's strategic planning initiatives, operational development, leadership performance, talent growth and retention, and overall corporate operations. He plays a key role in shaping the company's long-term direction and ensuring operational excellence throughout the enterprise.

Before joining Rizzetta & Company, Luciano built an extensive leadership career in hospitality management. He served in hotel general management and asset management roles for major ownership groups affiliated with Hilton, Marriott, and IHG. He also spent more than a decade with The Walt Disney Company, leading guest service operations in high-volume, guest-focused environments. Most recently, he held corporate hotel management roles overseeing new hotel development and providing Task Force General Management support, where he specialized in operational recovery and performance improvement for distressed properties worldwide.

Lucianno holds a Bachelor of Science in Aeronautics from Embry-Riddle Aeronautical University and maintains his Commercial Pilot License, along with multiple ratings and certifications.



**Kayla  
Connell**

Kayla Connell is part of the CDD management team having been with Rizzetta & Company since 2019 and manages the District Financial Services department where she and her staff are responsible for the preparation of tax rolls for the thousands of homeowners residing in Rizzetta managed Districts and the corresponding collection of the revenues from the various tax collection offices.

Additionally this department issues Estoppels for properties changing ownership, assists in individual District budget preparations and posts required disclosures to EMMA – the official source for municipal securities data and disclosure documents. She oversees the writing of assessment methodology reports for bond issuances, refundings and restructures; authoring Statement of Estimated Regulatory Costs reports for District establishment and boundary amendment petitions.

Kayla spends some of her spare time supporting Feeding Tampa Bay, Autism Speaks as well as as playing golf. Kayla received her Bachelor of Science in Finance from the University of Central Florida.



**Zack  
Feell**

Zachary Feell is a Senior Financial Analyst for the Rizzetta & Company Corporate Team, responsible for Financial Planning & Analysis activities across all Rizzetta lines of business.

Over the course of his 2+ years at the company he has built various models to accurately forecast Rizzetta & Company Financials across CDD, HOA and Community Services; closely tracking client and expense activities, delivered to drive confident business decision making for Senior Management. Additional responsibilities include managing Real Estate loan activities, CDD payment verification controls and ad hoc Corporate Accounting projects.

Zachary spends his free time outdoors, as he enjoys traveling, hiking, and golfing. Zachary has worked in the Finance field for over 10 years and received his Bachelor of Science in Finance from Florida State University in 2011.





# EXTENDED SUPPORT FOR SUNCOAST CDD

## TEAM MEMBERS



**William (Bill)  
Rizzetta**

Bill Rizzetta is the founder and President of Rizzetta & Company and has been responsible for the overall operation of the firm for over 37 years. In that time, he participated in the establishment and management of over 150 Community Developments Districts in Florida which issued over \$3 billion in bonds in over 250 separate transactions and managed over 170 Homeowners Associations.

He received his B.S. from the U.S.F. College of Engineering and his M.B.A. from U.S.F. School of Business. He has been qualified as an expert witness and provided testimony in: bond validation hearings in circuit court; administrative hearings conducted by the State of Florida, local public hearings required for establishment of CDD's and the levy of special assessments and litigation regarding impact fee assessments.

He built Rizzetta on emphasizing the importance of giving back to the community and financially supports a variety of organizations including The Spring, Joshua House, Meals on Wheels, Athletes & Causes, Tampa Bay Heros and the Shriners. He previously served on the Board of Directors of the Tampa Lighthouse for the Blind and currently serves on the Board of Directors of the Jason Ackerman Foundation.



**Shawn  
Wildermuth**

Shawn Wildermuth, our long-time Chief Financial Officer, is responsible for all financial aspects of the Rizzetta companies as well as oversees the financial reporting for our clients, including special taxing districts and community associations.

Mr. Wildermuth has over 35 years of finance and accounting experience with both public and private companies. He started his career in public accounting with Arthur Andersen in Chicago. During his career, he has gained experience in various industries, including real estate development, Professional Employer Organizations, direct marketing, and manufacturing. Prior to joining Rizzetta & Company, he held positions as Chief Financial Officer, Controller, Director of Treasury & Budget, and Director of Finance. His responsibilities included financial reporting, accounting, finance, treasury, payroll, human resources, and computer consulting.

Mr. Wildermuth received his bachelor's degree in Accountancy from the University of Illinois at Champaign-Urbana. He is a Registered **Certified Public Accountant** in the State of Illinois and a member of the American Institute of Certified Public Accountants.



**Scott  
Brizendine**

Scott Brizendine is our Vice Present of Strategic Development & Consulting. Scott provides comprehensive end-to-end consulting services throughout the community development lifecycle, specializing in special taxing district formation, structuring, and governance nationwide. This role provides expert strategic guidance across district establishment, amenity planning, financial feasibility analysis, regulatory compliance, and seamless transitions from developer to resident control. Most recently, Scott was the Vice President, Operations overseeing all operations associated with Rizzetta’s district services department.

Previously, he was the Manager of District Financial Services after serving 10 years as a District Manager and Associate Director, beginning his employment with Rizzetta in 2005. He has extensive experience managing special districts in Florida and Louisiana, as well as writing assessment methodology reports for 150+ bond issuances, processing assessment rolls and providing continuing disclosure services. He has served as an expert witness multiple times for litigation, district establishments, district boundary amendments and bond validation proceedings. Prior to joining Rizzetta, Scott worked in the Finance Department of the Walt Disney Corporation and was employed as an accountant for property management companies in Indianapolis as well as in Tampa.

Scott received a bachelor’s degree in Finance from Florida State University. He is a licensed Community Association Manager and Notary Public. He is a member of the Florida Government Finance Officers Association, the Association of Florida Community Developers, and a graduate of Leadership Tampa Bay – Class of 2018. Scott has enjoyed volunteering his services to multiple charities including the Make a Wish Foundation, Metropolitan Ministries and The United Way.



**Taylor  
Nielsen**

Taylor Nielsen is our Manager of Business Development for Rizzetta & Company and is responsible for development and execution of strategic initiatives aimed at growth and expansion. Prior to this role, Taylor served as a District Manager for accounts in the Hillsborough, Manatee and Pasco Counties.

Before joining the team at Rizzetta & Company, Taylor came from a background of Operations and Brand Management; with over 7 years of experience. During this time, Taylor was working in the tourism hotspot, Orlando, FL among top level management overseeing the largest rental car operation in the world, generating over 100 million in revenues per year.

Taylor received his B.A. from the University of Central Florida, is a licensed Community Association Manager, and licensed Real Estate Sales Associate in Florida.

OTHER 

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SERVICES

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FOR YOUR CONVENIENCE



# ASSOCIATION SERVICES

Rizzetta & Company provides services in association management along with a complete range of accounting and financial reporting services to each of the Associations we manage. These services include financial statement preparation, coordination of budgets, billing and collecting dues, accounts payable processing, compliance with state required filings, compliance with Association covenants and ongoing analysis and reporting of the Association's finances throughout the year. A summary of these services is shown below:

- **Accounts Payable:** Disburse payables as approved by the Association's board.
- **Assessment Collection:** Prepare invoices for annual association assessments, dues, fines, or other amounts due to the Association. Track collections and follow up with delinquent notices as needed.
- **Architectural Control:** Approve all exterior renovations, additions, or other modifications subject to architectural review.
- **Audits:** Provide all supporting schedules and accurate accounting records to ensure the efficient and timely completion of the audits or reviews performed annually.
- **Bank Accounts:** Maintain association bank accounts.
- **Budgeting:** Coordinate the preparation of the Association's annual maintenance budget as well as monitor disbursements and expense payments.
- **Community Inspections:** Perform regular inspections of properties to ensure compliance with deed restrictions. Prepare and send violation notices, as necessary.
- **Compliance:** Ensure the Association is compliant with governing documents and the Florida Statutes.
- **Emergency Services:** Coordinate emergency and after-hours services as necessary to minimize the disruption of normal Association activities.
- **Financial Statements:** Prepare monthly and annual financial statements.
- **Meeting Planning:** Prepare agendas, meeting materials and all other documents necessary for presentation at regular or special meetings.
- **Owner Information:** Maintain detailed owner information to ensure up-to-date owner information for each property for purposes of billing, violation notices or any other general correspondence.
- **Records Maintenance:** Maintain Association records and files and perform all other administrative functions necessary for efficient Association management.
- **Tax Preparation:** Coordinate the preparation and filing of federal income tax returns.
- **Title Company Correspondence:** Provide amounts of outstanding dues, assessments or liens and provide estoppel information to title companies for individual lot closings.



# AMENITY SERVICES

Amenity Services provides professional onsite management services for amenity facilities in both Community Development Districts and Community Associations that can be customized to fit the needs of a community.

Amenity Services focuses on providing all the amenity staffing needs for a community through dedicated onsite staff designed to handle the day-to-day operational needs of any community so it may thrive at the highest level. A summary of these services is shown below:

- **Pre-Opening Services:** Pre-opening services consist of getting an amenity center ready, from concept to reality. Our dedicated group of professionals will handle everything needed to ensure a successful Grand Opening.
- **Onsite & Personnel Management:** Onsite management services include development of operating procedures and general community maintenance to maintain and improve efficiency. Personnel management services included the selection, supervision, evaluation, and ongoing training of staff.
- **Recreation Management:** Recreation management services provide management and oversight of all recreational assets including managing facility rental spaces.
- **Accountability & Communication:** Onsite staff will complete weekly or monthly reports regarding facility operations and accomplishments.
- **Community Newsletters:** Create informative community emails that are designed to promote activities and provide residents with important community updates.
- **Lifestyle & Events:** Plan and promote events to bring the community together to create memories by providing a variety of innovative programs, activities, and events for residents of all ages. Lifestyle activities for social, educational, instructional, wellness, and recreational programs can be customized for each community to maximize participation and enjoyment.
- **Owner Information:** Maintain detailed records to ensure up-to-date resident information for community amenity access purposes.
- **Maintenance Services:** Complete work orders, preventative maintenance procedures, and facility inspections to ensure all is in good working order. Provide client with proposals for various projects.
- **Facility Appearance:** Ensure all buildings, grounds, and amenities are kept in pristine condition to create a safe and welcoming environment for all residents.



# LANDSCAPE INSPECTION SERVICES

We offer an extensive menu of professional field services for both Community Development Districts and Community Associations. Our field services management team is Green Industries Best Management Practices (GIBMP) certified in the state of Florida. A summary of these services is shown below:

- **Landscape Maintenance Inspections:** Perform grounds inspections, provide the Client with inspection report, notify maintenance contractor about deficiencies in service and obtain proposals for various landscape projects.
- **Landscape Turnover Inspections:** Attend landscape turnover meeting and participate in the inspection on behalf of the Client. Follow up report provided.
- **Landscape and Irrigation Specification Development:** Develop a customized set of standards and specifications based on the Client's needs and budget. Conduct the bidding process, review and prepare a bid tabulation document for the Client. Assist the Client with reviewing the bid tabulation and other pertinent information.
- **Landscape Design:** Landscape designer on staff available for landscape design, landscape enhancements and landscape design consultation in the communities and amenity facilities.
- **Master Task Project Plan for Mature Communities:** Develop a project plan specific to landscape replacement and enhancement for the common grounds and the amenity facility. Emphasis is on maturing landscape in the community and budgeting accordingly.
- **Community Asset Management Plan:** Perform a complete inventory of the Client's assets and provide an inventory report.



# AQUATIC INSPECTION SERVICES

Our Aquatics Inspection division provides a layered testing and quality control systems, using the latest and most comprehensive industry standards. Each of our Aquatic Inspection Specialists is a certified Aquatic Weed Spray Technician in the state of Florida. Our team is committed to elevating the waterways in your community with detailed inspections, formal reporting, enhancement planning, and effective vendor communication strategies. A summary of these services is shown below:

- **Community Asset Management Plan:** Perform a complete inventory of the community aquatic assets and provide an inventory report to the board
- **Community Education:** Present teaching events to provide the latest research and developments in Aquatic Sciences and provide a knowledge base for the residents.
- **Aquatics Maintenance Inspections:** Perform visual waterway and body of water inspections, provide the board with an inspection report, notify maintenance contractor of deficiencies in service, and obtain proposals for aquatic projects.
- **Pond and Waterway Turnover Inspections:** Attend property turnover meetings that include waterways and participate in the inspection on behalf of the board. Provide a follow-up report regarding the turnover inspection.
- **Aquatics Specification Development:** Develop a request for proposal (RFP) document to include a customized set of standards and specifications based on the community needs and budget. Conduct the bidding process, review, and prepare a bid tabulation document for the board. Assist the board with reviewing the bid tabulation and other pertinent information.
- **Master Task Project Plan for Mature Communities:** Develop a project plan specific to long-term enhancements and maintenance for the community's waterways and bodies of water. Emphasis is on long-term health and efficiency of the waterflow systems in the community and efficient budgeting.



## CUSTOMER

# SATISFACTION



**A SATISFIED  
CUSTOMER  
IS THE BEST  
BUSINESS  
STRATEGY  
OF ALL**

- Michael LeBoeuf

## WE EXCEED

# EXPECTATIONS

The single most important factor in being successful is customer satisfaction. We understand that **Suncoast CDD** has certain unique characteristics. While all have similarities, our success comes from our ability to understand the nuances of each client and adapt our services, as necessary. This approach generates the basis for long-term partnerships with clients we have represented for nearly twenty years. Our service is client-centric while ensuring the district is compliant with state statutes and fulfilling bond-holder obligations.



## WHAT OUR CLIENTS

# SAY ABOUT US...

“Rizzetta & Company is currently managing three Districts that they helped us create in the Jacksonville area. I don’t know of another management firm that has the continuity and stability of Rizzetta. I have dealt with Bill Rizzetta and Melissa Dobbins and I still do today. Professionalism and customer service have always been a hallmark of their organization.”

***Bob Porter, Senior VP Land, D. R. Horton, Inc., Jacksonville***

“Rizzetta’s staff have been amazing to work with, their depth of knowledge in the CDD world made a very difficult process almost painless. The Rizzetta team’s depth of experience in managing CDDs proved invaluable throughout the process. Every question or situation we presented was met with prior examples and knowledgeable guidance.”

***Andy Smith, Executive Vice President of Operations  
at Freehold Companies***

“Rizzetta & Company has recently become the management for our Community Development District. Their positive impact within the community has been immediate. The responsiveness to issues and the professional manner in which they have been addressed has proven to be incomparable to previous management. We look forward to a relationship of many years with Rizzetta & Company.”

***Susie White, Chairperson, The Harbourage at  
Braden River Community Development District***



# CLIENT REFERENCES

## **Stephen Brown, Chairman**

Covington Park CDD

E: [sbrown@covingtonparkcdd.org](mailto:sbrown@covingtonparkcdd.org)

W: [covingtonparkcdd.org](http://covingtonparkcdd.org)

## **TJ Pyche – Chairman**

Waterset North CDD

E: [tpyche@watersetnorthcdd.org](mailto:tpyche@watersetnorthcdd.org)

[tpyche@outlook.com](mailto:tpyche@outlook.com)

W: [watersetnorthcdd.org](http://watersetnorthcdd.org)

## **Debra Johnson – Vice Chair**

Paseo CDD

E: [seat2@paseocdd.org](mailto:seat2@paseocdd.org)

W: [paseocdd.org](http://paseocdd.org)

## **Stanley Haupt – Chair**

The Verandahs CDD

E: [shaupt.cdd@gmail.com](mailto:shaupt.cdd@gmail.com)

W: [theverandahscdd.org](http://theverandahscdd.org)





# COMPANY INSURANCE



## CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
5/13/2025

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an **ADDITIONAL INSURED**, the policy(ies) must have **ADDITIONAL INSURED** provisions or be endorsed. If **SUBROGATION IS WAIVED**, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

<b>PRODUCER</b>		<b>CONTACT NAME:</b> M.E. Wilson Company, LLC	
M.E. Wilson Company, LLC dba Waldorff Insurance & Bonding; dba Underwood Anderson Insurance 300 West Platt Street Tampa, FL 33606		<b>PHONE (A/C No. Ext):</b> (813) 229-8021	<b>FAX (A/C No.):</b> (813) 229-2795
		<b>E-MAIL ADDRESS:</b> certificates@mewilson.com	
		<b>INSURER(S) AFFORDING COVERAGE</b>	<b>NAIC #</b>
		<b>INSURER A :</b> Old Republic Insurance Co.	24147
		<b>INSURER B :</b> Starstone Specialty Ins Co	44776
		<b>INSURER C :</b> Zurich American Ins Co	16535
		<b>INSURER D :</b> Federal Insurance Company	20281
		<b>INSURER E :</b> ACE American Insurance Company	22667
		<b>INSURER F :</b>	

**COVERAGES** **CERTIFICATE NUMBER:** 208693 **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> <b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PROJECT <input type="checkbox"/> LOC OTHER:			MWZY31662524	05-01-2025	05-01-2026	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 400,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000
A	<b>AUTOMOBILE LIABILITY</b> <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY			MWTB31662624	05-01-2025	05-01-2026	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ PIP \$ 10,000
B	<input checked="" type="checkbox"/> <b>UMBRELLA LIAB</b> <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> <b>EXCESS LIAB</b> <input type="checkbox"/> CLAIMS-MADE DED. <input checked="" type="checkbox"/> RETENTION \$ 0			CSX00093460P02	05-01-2025	05-01-2026	EACH OCCURRENCE \$ 5,000,000 AGGREGATE \$ 5,000,000
A	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below			MWC31662424	05-01-2025	05-01-2026	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
C	<b>Employment Practices Liability</b>			MPL871431701	05-01-2025	05-01-2026	Per Occurrence 2,000,000

**DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES** (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)  
60 days notice of cancellation applies except non-payment of premium 10 days notice per policy terms & conditions.

<b>CERTIFICATE HOLDER</b>	<b>CANCELLATION</b>
For Information Purposes Only.	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE

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# OUR COMMITMENT TO THE INDUSTRY

As a leader in District Management, we have a responsibility to be aware of industry-related developments and then sharing that knowledge with our clients and peers. We encourage continuing education for all staff and provide the resources needed to attend classes and conferences. Currently, Rizzetta holds memberships in the following professional organizations:

- Association of Florida Community Developers
- Community Associations Institute
- The Northeast Florida Builders Association
- Florida Government Finance Officers Association
- Florida Nursery, Growers & Landscape Association
- CFO Exchange Group
- Florida Association of Special District
- Urban Land Institute, Tampa Bay

# GIVING BACK TO THE COMMUNITY



Rizzetta believes we have a responsibility to give back to the communities in which we operate. We have found the personal rewards of helping far exceeds any investments made.

WE BUILD \_\_\_\_\_  
PARTNERSHIPS  
THAT LAST \_\_\_\_\_



Rizzetta & Company  
Professionals in Community Management

**CORPORATE OFFICE**

3434 Colwell Avenue, Suite 200, Tampa, FL 33614  
888-208-5008 | rizzetta.com

**Municipal Advisor Disclaimer :** Rizzetta & Company, Inc., does not represent the Community Development District as a Municipal Advisor or Securities Broker nor is Rizzetta & Company, Inc., registered to provide such services as described in Section 15B of the Securities and Exchange Act of 1934, as amended. Similarly, Rizzetta & Company, Inc., does not provide the Community Development District with financial advisory services or offer investment advice in any form.

# Say Hi to Happy Living

**Introducing Suncoast CDD, to a new approach  
to community management—  
reinvented, reimaged and  
uniquely designed for you.**





# Executive Summary

## THANK YOU FOR THE OPPORTUNITY.

Dear Suncoast CDD Board of Supervisors,

The Suncoast Community Development District deserves more than management. It deserves a partner.

Choosing the right management company affects every resident's daily experience, your community's financial health, and the trust homeowners place in their board. That decision deserves to be made carefully, and we appreciate the opportunity to show you what Kai brings to the table.

Since 2020, Kai has grown to serve 42,000+ households across 14 Florida counties, not by being the biggest firm in the area, but by being the most responsive and the most genuinely invested. We bring enterprise-grade technology, an experienced CDD team, and a 24-Hour Response Guarantee backed by real accountability.

What Suncoast gets with Kai:

- A dedicated team that knows your community by name, not by account number
- Full-service CDD management with CPA-backed financial reporting
- Proactive field management with real-time field service updates via Kai365°
- A seamless transition with zero disruption to residents

We're not here to win a contract. We're here to earn a long-term partnership.

*Lauren Parsons*

**Vice President**

**Lauren@HiKai.com**

**813-351-9491**

**www.HiKai.com**



**Lauren Parsons** is the Vice President at Kai Community Management, a boutique HOA, CDD, and lifestyle management firm headquartered in Tampa, Florida. Lauren leads Kai's growth strategy across new market development, developer partnerships, and client retention – serving as the primary relationship builder between Kai and the boards, developers, and communities it partners with.

With deep expertise in CDD governance, HOA operations, and community transitions, Lauren brings a rare combination of strategic vision and hands-on operational knowledge to every client engagement. She is known for her direct, warm communication style and her ability to guide communities through seamless management transitions with minimal disruption.

Lauren is based in the Tampa Bay area and is personally committed to building communities where residents genuinely love where they live.



# Say Hi to Happy Living

**COMMUNITY MANAGEMENT DONE RIGHT.**

We launched Kai in 2020 to address a straightforward issue: residents struggled to get clear, timely responses. With responsibilities split among HOAs, CDDs, builders, and developers, accountability was scattered. Kai brought operations and resident support under one roof—initially serving developer-owned properties—and leveraged technology to make communication seamless and dependable.

As we expanded, we moved beyond developer-controlled properties and doubled our portfolio by partnering with additional developments and resident-managed communities. Our approach remained the same: real answers from real people, powered by innovation and technology, and supported by our Happiness Guarantee.

**Kai leads with  
Kindness. Action. Innovation.**

## 24-Hour Response Guarantee(d)

We guarantee a response within 24 hours.  
If we miss it, you automatically get a \$5 gift card.  
No questions asked.

**Kai's Mission:**  
**Maximize Happiness.**

**All Kai services are customized to meet your needs.**

### **Homeowners Associations**

Full-service HOA management, including handling compliance, finances, maintenance, and more

### **Community Development Districts**

Specialization in district management that oversees operations, financing compliance, and community growth

### **Lifestyle & Events**

Customizable lifestyle services with wellness programs, social events, and family-focused experiences

### **Field Services**

Vendor monitoring, contract negotiations, maintenance assistance, and measuring service quality

### **Accounting**

CPA-backed accuracy, transparent reporting, and timely financial insights you can trust

### **Commercial Association Management**

CPA-backed accuracy, transparent reporting, and timely financial insights you can trust



# Proposed District Manager

## Heather Dilley



Heather is a highly accomplished Community Development District Manager with more than 15 years of experience supporting and enhancing communities. She is recognized for her strong financial oversight, budgeting expertise, and strategic planning, consistently delivering stability and long-term value to the districts she serves. Her success is grounded in a meticulous management style and exceptional attention to detail. Heather approaches every aspect of district operations with precision—ensuring workflows are seamless, documentation is thorough, and nothing is overlooked. Her proactive mindset allows her to anticipate challenges and maintain strong, consistent performance, making her a trusted partner to Boards and residents alike.

A key strength of Heather's leadership is her communication. She translates complex information into clear, actionable insights, empowering Board members to make confident, informed decisions. By adapting to each Board's unique preferences, she ensures her approach aligns seamlessly with their goals.

Heather's professionalism, responsiveness, and results-driven mindset make her an invaluable asset to every community she serves. She is supported by Kai's VP of District Management, providing additional depth and expertise.

- **Names and number of CDDs represented by the proposed District Manager:**
  - 4 Districts - K Bar Ranch CDD, Union Park CDD, Live Oak No. 1 CDD, Westchase CDD
- **Length of Years Serving as a District Manager:**
  - 6 Years
- **Site Visits:**
  - To be performed a minimum of once per month.
- **After Hours Emergencies:**
  - Contact Kai's 24/7 emergency line: 813-565-4663
- **Backup Plan When Heather is Not Available:**
  - With Heather's small portfolio, it is easy for her to manage her schedule and ensure she attends all meetings. In the event that Heather is not available, we have several other District Managers on the team to ensure that coverage is always provided for Suncoast CDD.
- **Escalation Procedures:**
  - Andy Mendenhall, VP of District Management - Andy@HiKai.com - 813-404-3507
  - Lauren Parsons, VP - Lauren@HiKai.com - 813-351-9491

### Contact Heather:

- [Heather@HiKai.com](mailto:Heather@HiKai.com) - 813-625-9231



# District Operations

## RECORDS MANAGEMENT

- Serve as official custodian of District records
- Maintain records in compliance with retention laws
- Respond to public records requests promptly
- Ensure ADA-compliant public records access

## MEETING SUPPORT

- Manage all District meetings in compliance with Chapters 189 and 190, Florida Statutes
- Prepare agendas, minutes, and supporting materials
- Publish statutory notices and coordinate meeting logistics
- Maintain meeting schedules and required agency notifications

## DISTRICT OPERATIONS & ADMINISTRATION

- Provide policy guidance to the Board
- Track Board action items and follow-up tasks
- Primary administrative contact for the District
- Administer and evaluate District contracts
- Conduct onsite property and infrastructure inspections
- Coordinate ADA compliance and website content
- Manage insurance, certificates, claims, and risk management
- Manage RFP processes, and vendor selection
- Negotiate with agencies, vendors, and residents as authorized

## STATUTORY COMPLIANCE & REPORTING

- Complete required annual filings, reports, and audits
- Submit Board meeting schedules and voter registration reports
- Coordinate ethics disclosures and public depositor reporting

## SCOPE OF SERVICES



**Andy Mendenhall**

### **VP of District Management**

Andy serves as Vice President of District Management at Kai, where he leads the company's district management department and oversees operations for multiple Community Development Districts. With more than 20 years of experience, he is recognized for his expertise in CDD governance, financial strategy, and compliance. Holding both an MBA and Project Management Professional (PMP®) certification, Andy brings proven leadership in guiding Boards, managing municipal bonds and budgets, and driving efficient, accountable operations.



# Finance & Accounting

## BOARD PAYROLL SYSTEM – ENGAGE PEO

- Engage PEO delivers a reliable, compliant payroll solution tailored to Supervisor compensation. Payroll is processed twice monthly to align with meeting schedules, ensuring accurate, on-time payments. As an IRS-Certified and ESAC-accredited provider, Engage handles all tax filings and reporting within a secure, cloud-based system that gives Supervisors and administrators transparent, self-service access.

## FINANCIALS, REPORTING & AUDIT SUPPORT

- Kai delivers full GAAP/GASB-compliant financial management overseen by degreed accounting professionals.
- Financial systems & reporting include:
- Implementing an integrated financial reporting system tailored to government/fund accounting.
- Managing general, capital, reserve, and bond fund activity.
- Preparing monthly financial statements, including budget-to-actual summaries.
- Delivering required state, county, and trust-related financial reports.
- Coordinating directly with independent auditors and ensuring timely completion of the Annual Audit.
- With reliable preparation and organized documentation, we help ensure a smooth audit cycle each year.

## CAPITAL PROGRAM ADMINISTRATION

Kai partners with District Staff and Engineers to evaluate capital projects, analyze timing and lifecycle costs, and align improvements with reserve needs and long-term planning. We also work with underwriters, lenders, and financial advisors to structure effective funding solutions. With proven procedures and reliable coordination, we guide Districts through complex financing and capital implementation processes.



**Kristen Gomez, CPA**  
**Controller**

Kristen is a licensed CPA with more than 15 years of accounting leadership. She oversees Kai's entire accounting department, bringing extensive expertise in CDD and HOA management, including budgeting, assessments, audits, reconciliations, and GAAP financial reporting for a wide range of community entities. Kristen holds a Master's in Accounting and Financial Management, complementing her CPA designation and reinforcing her depth of technical knowledge. Her leadership ensures accuracy, transparency, and accountability, giving communities confidence in the integrity and stability of Kai's accounting operations.



# Finance & Accounting

## ACCOUNTS PAYABLE & VENDOR PAYMENT PROCESSING

- Kai provides a secure, transparent, and timely AP workflow.
- Services include:
- Full invoice intake, coding, and documentation management.
- Automated approval routing using AvidXchange.
- Easy invoice submission & payment scheduling that ensures timely vendor compensation.
- Construction requisition processing and purchase order oversight.
- Maintaining auditable AP records with strong internal controls
- Ensure reliable vendor relationships to support uninterrupted District operations.

## TREASURY SERVICES

- Kai protects District funds and maximizes liquidity through disciplined treasury management.
- Services include:
- Cash flow oversight and bank account administration.
- Investment of surplus funds under Florida law via SBA-approved programs.
- Securing favorable banking terms through economies of scale.
- Maintaining strong internal controls and accurate cash reporting.
- Kai has strong banking relationships with numerous banks across the State of Florida, ensuring the District has appropriate safeguards in place and District funds are protected.



**Kerri Robinson**

### Director of Finance & Treasury

With over 20 years of experience in treasury operations and banking, Kerri is a Certified Treasury Professional (CTP) with dual MBAs in Management and Finance. She specializes in cash management, disbursements, investments, lending, and risk mitigation, with a strong focus on Community Development District (CDD) finance.

Kerri has overseen bond proceeds management, debt service coordination, and compliance strategies that ensure transparency and statutory alignment. By integrating treasury best practices with the unique structure of CDDs, she delivers precision in financial reporting, safeguards District assets, and supports Boards in achieving long-term stability. Known for her strategic insight and operational excellence, Kerri provides trusted leadership that enhances confidence among Boards, auditors, and stakeholders.

# Your District's Finances, Fully Visible



Kai manages CDD's finances through Vantaca, a purpose-built community management platform that gives your Board direct, real-time visibility into every dollar coming in and going out of your district. No more waiting for a meeting to review financials. No more uncertainty about where an invoice stands.

With Vantaca, your Board has the tools to oversee the District's finances with confidence, at any time, from any device.

## Board Accounting Experience:

- Automated financial management (AP/AR, budgeting, reconciliations, billing)
- Real-time dashboards and reporting
- Set up for Board to approve invoices prior to payment
- View bank account balances in real-time
- On demand financial reports and downloads
- Secure, centralized data and built-in communication tools
- Training by Kai on how to maximize your Board portal



The screenshot displays the Vantaca dashboard for 'Presidencial Valley'. The user is logged in as 'jucky'. The dashboard includes a sidebar with navigation options: Dashboard, Payments, Requests, Calendar & Events, Directory, Documents, Board Actions (highlighted with a red box), FAQs, Help, and My Profile. The main content area shows account details for '123 Main Street fd Presidencial Valley' with an account number of 10119224. The account balance is \$54,717.34. There are upcoming charges of \$150.00 and an auto-draft enrollment. A 'Board Actions' section is highlighted with a red box, listing: ARC Management (All ARCs), Work Orders (1 item, All Work Orders), Inspections & Violations (1 item, All Inspections), Collections (14 items, All Collections), and Invoices (All Invoices). A 'Recent Requests' section shows a 'General Question - fest' submitted on 4/07/2022.

REPLACING CHAOS WITH CONNECTION.



# Transparent AP Workflows

Here is how every invoice moves through Kai. From receipt to payment to built-in separation of duties, automated safeguards, and full Board visibility at every step.



## Invoice Entry Point

All vendor invoices enter through a single controlled channel – the dedicated email lockbox [Invoices@HiKai.com](mailto:Invoices@HiKai.com) – which feeds directly into the AP system. Every invoice is timestamped and tracked from the moment it enters the system.

1

## AP Assignment Team

The AP team receives the invoice in Vantaca, assigns it to the correct community and vendor, and routes it to the community manager. AP does not code or approve, their role is intake and routing only.

2

## Manager Review & GL Coding

The manager validates the invoice against the vendor contract, confirms the work was performed and the amount is correct, and codes it to the proper general ledger account. Once satisfied, the manager routes it to the Board for approval.

3

## Board Approval (If Required)

The invoice enters the Board's approval queue in Vantaca with full visibility into the vendor, amount, GL coding, and any supporting documentation. Nothing moves to payment without Board approval.

4

## Accountant Review & Payment

Only after approval does the accountant review the invoice one final time and process payment. This is the only person who can execute a payment, and they cannot do so without the preceding steps completed in the system.



Every handoff is logged with a timestamp, user ID, and action taken – creating a permanent, auditable record accessible to every Board member through the Vantaca portal at any time.

# Bonds, Budgets & Assessments



## KAI FINANCIAL & BOND MANAGEMENT

- Preparation of estoppel letters
- Bond issuance and refinancing coordination
- Debt service billing, collection, and payment management
- Trustee liaison and compliance oversight
- Clear, reliable financial reporting to support fiscal stewardship

## FINANCIAL & ASSESSMENT SERVICES

- Assessment Roll Preparation: Ownership verification, parcel allocation, and county-ready roll development.
- Tax Roll Administration: Placement of assessments on the county roll, reconciliation with collections, and allocation between Debt Service and O&M.
- TRIM Compliance: Preparation of DR-421 certifications.
- Reporting & Compliance: Completion of all required state reports, maintenance of auditable financial records, and timely estoppel responses.

## BOND ADMINISTRATION

Kai structures and coordinates bond issuances and refinancing, including methodology reports and identification of cost-saving opportunities. Our team oversees debt service collections, ensures timely principal and interest payments, and manages trustee communications and invoice processing. Over the past five years, we have supported more than \$445 million in total bond issuances.

## BUDGETING

Our budgeting process begins with a Board vision session to establish priorities for the upcoming year. Kai's District Managers and accounting team then prepare draft budgets and lead a focused workshop to review revenue projections, operational needs, and strategic options.

We coordinate closely with District Staff, Engineers, and Attorneys to ensure all operational, maintenance, and compliance items are captured accurately. Public notices and statutory deadlines are managed seamlessly. The result is a transparent, collaborative budgeting process aligned with both immediate needs and long-term goals.



**Elizabeth Moore**

### Budget & Assessment Manager

With 17 years of experience in Community Development District (CDD) management, Elizabeth specializes in building multi-fund budgets and complex special assessment methodologies tailored to each client's unique development program. She combines deep expertise in financial modeling with advanced allocation techniques using ERUs, trip generation, impervious surface ratios, and benefit-based factors. Elizabeth has led the structuring of multimillion-dollar bond programs and true-up strategies, aligning long-term funding with the operational and capital needs of growing communities. Known for her precision, strategic foresight, and collaborative approach, she delivers high-impact solutions that drive financial resilience and stakeholder confidence.





# Field Service Management

Kai provides dedicated field and community oversight services designed around Suncoast CDDs specific infrastructure, including the stormwater pond system, landscaped medians and entrance monuments, irrigation network, recreational amenities, and common area corridors.

## PROACTIVE CARE

We conduct monthly on-site inspections of all District property and flag issues before they become expensive problems, from plant health and irrigation performance to pond bank conditions and safety hazards. Every inspection produces a written report with photographs delivered directly in your Board agenda package.

## COMMUNITY OVERSIGHT

We monitor Suncoast CDDs landscaping, pond system, playground areas, lighting, drainage infrastructure, and common area corridors, keeping the District safe, clean, and well-maintained year-round.

## VENDOR MANAGEMENT

We coordinate with all active contractors to ensure work is completed to standard, track open items through to resolution, and provide the Board with transparent progress updates at every meeting.

## CLEAR COMMUNICATION

Every monthly agenda package includes a field inspection report, vendor status updates, and a running action item tracker so the Board always has full visibility into asset conditions and follow-through.



**Brian Quillen**  
**VP of Operations**

Brian brings over 20 years of diverse experience in community and regional management, with a proven track record of operational oversight, team leadership, and resident engagement. Prior to joining Kai, he served as a Regional Director, where he was responsible for the successful management of multiple large-scale associations.

Brian's foundational experience in hospitality management has shaped his service-oriented leadership style, grounded in responsiveness, accountability, and continuous improvement. He remains committed to delivering high-performance results for communities.

### Some Active Field Issues We Are Already Aware Of:

Your February 2026 field inspection identified 18 open items, including:

- Frost-damaged plant material throughout the district requiring rejuvenation cuts and potential replacement
- Pond 1 dry conditions with lake bank erosion and washout concerns behind an adjacent home
- Active algae treatments needed in Ponds 5, 8, and along multiple pond edges
- Multiple irrigation repairs flagged
- Pond 17 safety signage (snake/alligator warning) broken and submerged – requires reinstallation
- Palm tree uplighting on Meadowbrook Drive at SR 54 left exposed after tree removal



# The 365° Shift in Community Management.

## Introducing Suncoast's Innovative Command Center

*A Kai exclusive service.*

Most management companies send you a monthly report. Kai gives you a live window into your community. **Kai365°** is our proprietary field service platform, built specifically for the communities we manage and customized to reflect Suncoast CDDs unique assets, vendors, and priorities.

**Good afternoon, Jordan** 🐾

Monday, April 6, 2026

Sunset Ridge HOA

- 20** Total Assets
- 12** Open Issues
- 3** Active Proposals
- 0** New Submissions

- \* Full Asset Visibility** Every District asset is catalogued and tracked in one place. Ponds, medians, irrigation, playgrounds, monuments, and lighting. No more guessing what you own or what condition it's in.
- \* Live Issue Tracking** Every field issue is logged the moment it's identified, assigned to the responsible vendor, and tracked through to resolution. The Board sees what's open, in progress, and complete, without waiting for the next meeting.
- \* Vendor Accountability** Issues are tied directly to vendors. Clear ownership, documented follow-through, no ambiguity.
- \* Resident Submissions** Residents submit issues directly through the platform. Every submission is logged, reviewed, and routed, so nothing falls through the cracks.
- \* Board and Resident Portals** The Board gets its own tracker view. Residents get their own tracker. Everyone has the transparent and customized access they need.

**Issues** + New Issue

All (5) Open (2) In Process (2) Complete (1) Filters

Search Issues...

- In Process** Board: Trail pavement cracking (Walking Trail - Loop A - Palm Coast Paving)
- Open** Board: Pond #1 erosion (Stormwater Pond #1 - ClearWater Stormwater)
- Open** Resident: Dog park fence gap (Dog Park)
- Complete**: Entry monument light out (Entry Monument - Main - Tropical Turf Management)
- In Process** Resident Board: Parking garage leak (Parking Garage)



# Proposed District Management Fees

Suncoast Community Development District		
Service	Annual Cost	Monthly Costs
District Management Services	\$48,000	\$4,000
Field Service Management	\$12,000	\$1,000
<b>Total Proposed Fees</b>	<b>\$60,000</b>	<b>\$5,000</b>

**ASSESSMENT AND FINANCING SERVICES:**

1. Fees for bond financing and re-financing services will be negotiated at the time such services are defined and requested. Typically, these fees will be billed on a lump sum basis and deferred until no later than the closing or refunding of the Bonds at which time all unpaid fees and expenses will be due and payable. Fees and expenses paid for these services are fully reimbursable/payable solely from Bond proceeds; and
2. Assessment roll services for preparation and certification of the assessment roll to the property appraiser and tax collector and/or directly collecting special assessments from landowners (if applicable). This fee will be included in the standard monthly fee.
3. Management services include 13 meetings per year. Meetings that exceed two hours will be subject to an hourly rate of \$275.00.
4. Field services includes 10 hours per month by a dedicated Field Service Manager. Additional hours are available at a rate of \$40/per hour.

**REIMBURSABLE EXPENSES**

The following out-of-pocket expenses will be billed to the District at cost, with no markup, and only with prior Board awareness for amounts exceeding board approved threshold limit:

- Postage, courier, and certified mail costs for District-required notices
- Printing and binding of Board meeting materials if physical copies are requested by the Board
- Recording fees and governmental filing fees required by law





At Kai, community management is about more than maintaining infrastructure. It's about protecting the investment residents have made in their home and their neighborhood. From proactive pond monitoring and landscape oversight to rapid vendor response and transparent Board reporting, we show up for Suncoast CDD the way a true partner should – before problems escalate, not after.

Our team is present, responsive, and accountable. With monthly on-site inspections, a live field tracking platform, and 24/7 emergency support, nothing falls through the cracks – and your Board is never left wondering what's happening in your community.

**Kai shows up for your District.**





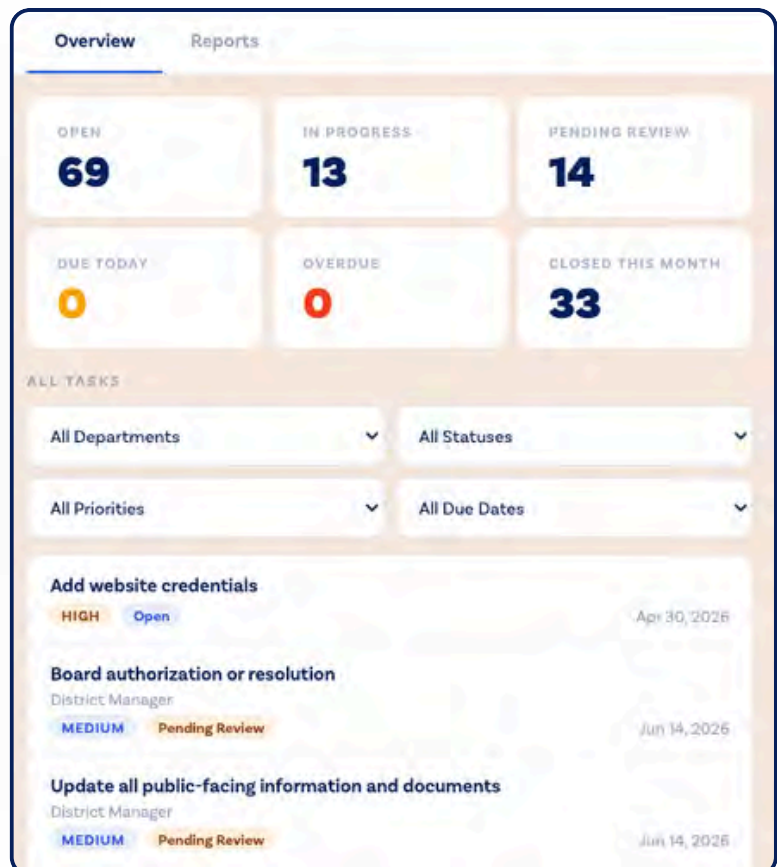
# A Smooth Transition to Kai

Switching management companies shouldn't feel like a leap of faith. With Kai, your Board has full visibility into every step of the onboarding process from day one. Our interactive Transition Dashboard gives Suncoast CDD a live, real-time view of your entire management transition – a list of structured tasks across six departments, tracked from kickoff to completion.



## What your Board sees:

- \* **A live progress dashboard** – see exactly how many tasks are open, in progress, pending review, and complete at any moment. No need to ask. No need to wait for a meeting.
- \* **Department level tracking** – tasks are organized by team, so the Board knows whether legal, finance, field services, or administration is driving each item forward.
- \* **Weekly email updates** – every week, Kai sends an automated progress report directly to Board members showing what moved, what's complete, and where we need input or decisions from the Board. No surprises.
- \* **Full transparency on blockers** – if something is stuck, we show you.
- \* **A view only Board portal** – Board members access the live dashboard with a simple shared password, from any device, at any time.



# BETTER MAINTENANCE. FOR BETTER COMMUNITIES.

With Kai’s in house maintenance program, repairs happen faster, standards stay higher, and improvements are visible. Every task is documented, budget-approved, and focused on visible results that improve safety, appearance, and day-to-day living for residents.

- \* Pressure washing
- \* General repairs and touch-ups
- \* Lighting, locks, and hardware repairs
- \* Minor plumbing and electrical fixes
- \* Fence, gate, and signage repairs
- \* Cleanup, painting, and surface repairs




- \* **48 Hour SLA for Quick Repairs**  
We respond to quick repairs within 48 hours of notice
- \* **30 day visible improvement promise**  
Every community gets at least 1 quarterly improvement
- \* **Small Jobs Engine**  
Short turn-around repair time with on hand supplies
- \* **Communication & Documentation**  
Community QR Codes to submit repairs  
Notice to residents  
Monthly updates of community improvements & actions




# why kai?

 **KAI'S FIVE CORE DIFFERENTIATORS:**


- Personalized, high-touch service. Your District Manager knows your community, knows your Board members, and treats your concerns as priorities, not just tickets in a queue.
- Tech-enabled operations and reporting. Modern management platforms give your Board real-time access to financial data, inspection reports, and action item tracking.
- Experienced CDD leadership. Deep, specialized expertise across Florida CDD management including operations, finance, bond compliance, field services, and statutory compliance.
- Local, accessible management. Kai is based in Tampa. Your District Manager will be nearby, attend your meetings in person, and respond directly, not route you through a call center.
- Long-term partnership mindset. We don't manage districts to fill a contract. We build relationships. Kai's goal is to be a trusted partner that adds value year after year. 

## YOUR KAI LEADERSHIP TEAM

 **Vice President**  
 Lauren Parsons  
[Lauren@HiKai.com](mailto:Lauren@HiKai.com) | 813-351-9491

 **VP of Operations**  
 Brian Quillen  
[Brian@HiKai.com](mailto:Brian@HiKai.com) | 813-474-7630

 **VP of District Management**  
 Andy Mendenhall  
[Andy@HiKai.com](mailto:Andy@HiKai.com) | 813-404-3507

 **VP of Communications/Resident Experience**  
 Maria Elia  
[Maria@HiKai.com](mailto:Maria@HiKai.com) | 813-803-1457

 **Controller**  
 Kristen Gomez, CPA  
[Kristen@HiKai.com](mailto:Kristen@HiKai.com) - 813-474-7739

 **VP of Lifestyle Innovation**  
 Eric Baker  
[Eric@HiKai.com](mailto:Eric@HiKai.com) | 813-474-7572

*"When I need items addressed they respond, I also commend on proactively patrolling and not waiting for an issue but advise on potential issues. In my world that meets my expectations and I would recommend using Kai management Services."*

 District Chairman

*"Our community has partnered with Kai for approximately one year, and the transition has resulted in a significant improvement in communication. Compared to our previous provider."*

 Happy Resident



# The Kai Portfolio

**CDDs:**  
**37**

**HOAs:**  
**45**



**Legal Name:**

Kai Connected, LLC

**Principal Address:**

2502 N Rocky Point Drive, Suite 1000, Tampa FL 33607

**Contact:**

Connect@HiKai.com • 813-565-4663

**Office Locations and Total Number of Employees at Each:**

Tampa Office: 37

Orlando Office: 9

## References

**Don Reichard**  
Chairman  
DG Farms CDD  
518-222-6111

**Randy Bach**  
Vice Chairman  
K Bar Ranch CDD  
813-494-6431

**Emily Vaughn**  
Chairwoman  
Cresswind DeLand CDD  
386-717-2709





**Lauren Parsons, Vice President**

**813-351-9491**

**Lauren@HiKai.com**

**www.HiKai.com**



**Suncoast Community  
Development District**  
Proposal – District Management Services  
2026

# CLEAR PARTNERSHIPS

## Re: Proposal for Suncoast Community Development District

Dear Board of Supervisors,

Inframark is excited and pleased to provide a proposal for District Management services with pricing and a scope of services for Suncoast CDD.

Our Mission is: "To be the Partner and Protector of the Most Critical Resource that helps Communities Prosper." We do this through our principles of CLEAR Partnership (Collaboration, Leadership, Excellence, Accountability, and Respect).

We strongly believe in our people and our ability to exceed our clients' expectations. These beliefs are rooted in some of the following:

### CLEAR PARTNERSHIPS



- Experience:**

  - Providing District Management Services to the State of Florida for over 45 years.
  - We provide service to over 143 CDDs and 3 Municipalities throughout Florida.
  - 20 District Managers on staff with 9 years + average tenure.
  - Our District Managers are degreed professionals with a variety of experience in IT, Finance, Government and Construction.
- Project Management:** We can provide project management services with an Inframark employee who has Project Management experience for capital improvement projects.
- Cost Savings:** We will review your current operating budget to identify savings opportunities or more efficient ways to operate the district.

# CLEAR PARTNERSHIPS

## Technology:

- Avid Strongroom: An advanced accounts payable system that is highly efficient and effective at making sure that District invoices are paid timely and only after review and approval by Inframark staff or a designated Board member, if desired. This system provides historical information on invoice payments, provides for creation of specialized reports, and allows Board members to review all invoices for the District through a web-based application.
- Customized Financial Statements and Budgets: Inframark developed a proprietary financial operating system designed exclusively for the Community Development business allowing us to provide clients with customized financial statements and budgets. Our financial software is continually being updated and we offer our clients the ability to choose how their financial statements and budget documents will look, depending upon the preference of the Board.
- **Team Approach: *We are more than the individual assigned to your account.*** Our service to your community will include a team of 10+ professionals.
- **Infrastructure:**
  - Full team of Health, Safety and Environmental (HSE) staff.
  - Complete internal IT support and infrastructure. We backup our servers and your information at multiple Inframark offices around the state and country to protect against catastrophic storms.
  - Team of HR professionals to assist with recruiting, employee retention and appreciation, bonus plans and more.

Inframark is committed to making continuous process improvements and service enhancements, offering new technology and processes to help keep your community on the leading edge of the industry. We are excited to implement our new service enhancements and technology for your community. All the proposed services are designed to demonstrate our desire to be a long-term partner for your community and make certain that the Board and residents are receiving the most effective and advanced services possible, all with a value-added service fee schedule.

We look forward to hearing from you concerning our proposal and further discussing these plans, along with your vision, for your community.



Chris Tarase  
President  
Inframark Community Management Services



# CLEAR PARTNERSHIPS

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# CLEAR PARTNERSHIPS

## Executive Summary

Inframark Community Management Services is pleased to provide this proposal for district and field management services to the board. Inframark has been one of the leading providers of District Management and HOA services in Florida for over 45 years.

To meet the needs of your District, we provide a fully empowered local District Manager out of our Tampa area office. We provide additional support to all our clients through a central office with a regional management, support team and our structured business systems. This approach brings the strength, experience and expertise of Inframark to work proactively to address the needs of the District in the most cost-effective manner possible.

Inframark specializes in value-added services to our clients which include the following:

- **Personnel:**
  - Inframark offers one of the largest and most accomplished professional teams in the District Management business.
  - We can also bring in professionals from different disciplines to address special issues that may arise. Therefore, it is not only the number of professionals we offer to your District as a value-added service, but also our competence in addressing a wide range of complex matters that may come before your District.
  - Your assigned team has more than 50 years combined expertise and experience in the CDD business.
- **Willingness to Meet Time & Budget Requirements:** Inframark is capable and committed to meeting time and budget requirements as agreed upon with the Board and in compliance with Florida statutes.
- **Experience:**
  - Inframark is the most experienced company in the business.
  - We manage over 225 clients statewide including Community Development Districts, Special Districts, Homeowner Associations and local municipalities.
  - We specialize in customized customer service and have a client retention rate of 97.6%.
- **Capital Project Management:** Inframark has a Certified Project Manager (PMP) who has the ability to manage multi-million dollar capital improvement projects for our clients.
- **Office Locations:**
  - We have seven offices throughout the State of Florida that support our district clients. They are located in Tampa, Brandon, Wesley Chapel, Ft. Myers, Celebration, St. Augustine and Coral Springs.

# CLEAR PARTNERSHIPS

- **Safety:**
  - Inframark is the only District management company who has a specialized team of Health, Safety and Environmental (HSE) professionals.
  - Documented monthly safety training for ALL Inframark personnel.
  - Disaster Preparedness Plans for staff and clients
- **Human Resource Management:**
  - Inframark has its own professional team of human resource professionals.
  - Provides drug and background screening that meet all applicable Federal and State requirements.
  - Employees complete monthly mandatory training on a wide variety of issues including sexual harassment, anti-discrimination, ethics, customer service and other important programs.
  - Regimented performance review process.
  - Spot bonus and annual merit incentives
  - Best in industry employee benefit and 401(k) program
- **Field Services:** Inframark is also able to provide the following field services with our own employees.

A complete range of Field Management and Maintenance services including but not limited to:

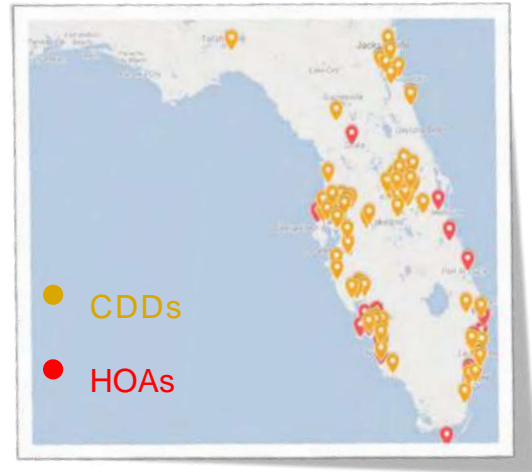
- Vendor management
- Contract administration
- Sidewalk grinding
- Pressure washing
- Concrete Replacement and sidewalk repair
- Monthly field services report
- Landscape reviews
- Janitorial
- A full range of general maintenance services for District and Association clients

# CLEAR PARTNERSHIPS

## About the Company

Inframark is an organization designed to accommodate all phases of operations for Community Development Districts municipalities, commercial, and residential property owner associations. Inframark serves over 300 association partners, and over 143 Community Development Districts, and has offices throughout the State of Florida in Wesley Chapel, Tampa, Jacksonville, Celebration, Ft. Myers, and Coral Springs.

Inframark maintains a focus in serving CDDs and HOAs, and as a result, has become a leader in our industry, managing over \$250M in financial assets for our Special Districts and Association clients throughout the state.



Inframark is an active member of Community Association Institute (CAI), the Association of Florida Community Developers (AFCD), the Urban Land Institute (ULI), the Tampa Bay Builders Association (TBBA), the Greater Orlando Builders Association (GOBA), Florida Association of Special Districts (FASD), and the Florida League of Cities.

Many of our Managers are committee and Board members for these organizations, volunteering their time to advancing best practices in community and district management.

*"I have been on the Board of Supervisors of the Meadow Pointe CDD in excess of ten years with over 5 years as Chairman and three years as Treasurer."*

*"I am totally satisfied with the service we have been and are receiving from Inframark. Our District Manager is dedicated, knowledgeable, and responsive to our needs. He is backed up by a professional staff, both locally and in Coral Springs."*

*"I highly recommend Inframark."*

*Dennis Smith- Former Chairman  
Meadow Pointe CDD*

# CLEAR PARTNERSHIPS

## Clients – References & Partial List

### Tampa Palms Open Space and Transportation CDD

Inframark has been TPOST CDD's management partner for over 20 years. The CDD oversees a variety of community needs, including maintenance of parks and waterway management, and general community upkeep. TPOST is an icon in Florida, and we are grateful for their continued partnership for over two decades.

### Two Rivers CDDs (North, South, East and West)

Two Rivers is a master-planned community of more than 6,000 planned residential homes, townhomes, apartments, and villas located North of Tampa that are enveloped by woods, grasslands, and water. Inframark has been partnered with Two Rivers since development, offering insight and solutions as Two Rivers navigates cultivating these beautiful, historical landscapes into a master-planned community filled with luxury homes connected to nature trails, agriculture, and lush springs.



### Celebration CDD

Celebration is an innovative, real town that successfully combines architecture, education, health, and technology in ways that promote a strong sense of community. Celebration, conceived as a small central Florida town with pre-1940s architecture, was developed by The Celebration Company (a subsidiary of The Walt Disney Company) in Northwest Osceola County, Florida. The District's infrastructure includes village-specific roadways, bridges, domestic water distribution systems, wastewater/sanitary sewer collection systems, wetlands, and common area development.



Inframark has provided Management Services for Celebration CDD (population 8,500) since the district was established in 1994. We have been involved since inception, providing Developer Services to The Celebration Company beginning in 1993 and through the years it has evolved into its current, arguably famous state.

Inframark oversees the day-to-day management of the District with responsibilities that include field management, financial reporting, accounting, administration, budget, and city clerk activities. We routinely participate in community activities, including the Celebration K-8 ball field construction, annual holiday lighting at Market Square Park, and other field-related enhancements outside the scope of our management contract.

# CLEAR PARTNERSHIPS

## REFERENCES

Inframark took over as the District Management Company for the Harbour Isles C.D.D. in December of 2020 and the transition could not have gone more smoothly. Mrs. Angel Montagna was selected to be our District Manager.

Prior to the first Board of Supervisors meeting Mrs. Montagna met individually with each of us Board members to not only get to know us as people but to discuss each of our concerns as well as our visions of what we hope to achieve in the future to make Harbour Isles a better place to live. As a result of her initiative in doing this, and her research into how to help with our concerns, the first Board meeting was well prepared and organized. And this enthusiasm, organization and the feeling of her caring about our community and its residents and striving to make it a happy place to live has continued. When issues have come up, big or small, Mrs. Montagna has always been a good listener and prepared to help with the problem-solving aspect with her vast knowledge and past experiences.

We Board members know if we have a question or a concern we can contact her by phone, text or email and she will promptly answer in a respectful, pleasant, helpful manner. Her professionalism is a true asset to our community.

All of the Inframark employees I have had contact with have been extremely respectful and eager to help in any way possible, always with good results. I have learned that a company is only as good as the employees it has working for it.

I have to say that, in the 12 years I have been a member of the Harbour Isles Board of Supervisors, Inframark has to be the best that we have had.

Respectfully,  
Elizabeth Fantauzzi  
Harbour Isles C.D.D. Board Chairman  
Appollo Beach, Florida (Hillsborough County)  
[Seat1@harbourislescdd.org](mailto:Seat1@harbourislescdd.org)

# CLEAR PARTNERSHIPS



<b>Celebration CDD</b> Celebration, FL (Osceola County)	Greg Filak - Chairman Greg.Filak@celebrationcdd.org
<b>Enterprise CDD</b> Celebration, FL (Osceola County)	Kimberly Locher - Chairman kimberly@readercommunities.com
<b>Rivington CDD</b> DeBary, FL (Volusia County)	Kimberly Locher - Chairman kimberly@readercommunities.com
<b>Highlands CDD</b> Wimauma, FL (Hillsborough County)	Kangelia Baxter - Chairman highlandsboardseat5@gmail.com

District (Partial List)	Region	County
Dovera CDD	Central	Seminole
Golden Lakes CDD	Central	Polk
West Lakeland WCD	Central	Polk
Brighton Lakes CDD	Central	Osceola
Celebration CDD	Central	Osceola
Enterprise CDD	Central	Osceola
Overoaks CDD	Central	Osceola

# CLEAR PARTNERSHIPS

Stevens Plantation CDD	Central	Osceola
Xentury City CDD	Central	Osceola
East Park CDD	Central	Orange
Urban Orlando CDD	Central	Orange
Vista Lakes CDD	Central	Orange
Gateway Services CDD	West	Lee
Vasari CDD	West	Lee
Cedar Hammock CDD	West	Collier
Stonebrier CDD	West	Hillsborough
Naples Heritage CDD	West	Collier
Quarry CDD	West	Collier
Heritage Lake Park CDD	West	Charlotte
Heritage Oak Park CDD	West	Charlotte
Riverwood CDD	West	Charlotte
Heritage Springs CDD	West	Pasco
Lake Bernadette CDD	West	Pasco
Lexington Oaks CDD	West	Pasco
Meadow Pointe CDD	West	Pasco
Meadow Pointe II CDD	West	Pasco
Oak Creek CDD	West	Pasco
Oakstead CDD	West	Pasco
Watergrass II CDD	West	Pasco
Arbor Greene CDD	West	Hillsborough
Cordoba Ranch CDD	West	Hillsborough
Hammocks (The) CDD	West	Hillsborough

# CLEAR PARTNERSHIPS

Harbour Isles CDD	West	Hillsborough
Heritage Isles CDD	West	Hillsborough
Live Oak No.2 CDD	West	Hillsborough
South Fork CDD	West	Hillsborough
South Fork East CDD	West	Hillsborough
TPOST CDD	West	Hillsborough
Waterchase CDD	West	Hillsborough
Westchester	West	Hillsborough
Spring Ridge CDD	West	Hernando
Woodlands CDD	West	Sarasota
Eastlake Oaks CDD	West	Pinellas
Lexington CDD	West	Manatee
Piney-Z CDD	West	Leon
Briger CDD	East	Palm Beach
Seminole Improvement District	East	Palm Beach
Bonterra CDD	East	Miami Dade
Beacon Lakes CDD	East	Dade
Spicewood CDD	East	Dade
Villages of Westport CDD	North	Duval
Maple Ridge CDD	East	Broward
Monterra CDD	East	Broward
Pine Tree Water Control District	East	Broward
St. Johns Forest CDD	East	St. Johns
Palm Coast Park CDD	East	Flagler
Town Center at Palm Coast CDD	East	Flagler

## Pricing & Business Considerations

<b>Inframark's Pricing</b>	
District Management Services	\$35,895.00
Field Inspection Services	\$12,000.00
<b>Total</b>	<b>\$47,895.00</b>

**Additional Comments:**

- It will be written into the contract that Alba Sanchez will remain the District Manager as long as she is with Inframark.
- It will be written into the contract that John Fowler will remain the Field Inspector as long as he is with Inframark.

# CLEAR PARTNERSHIPS

## Qualifications

### Meetings, Hearings and Workshops:

Inframark attends and conducts all regularly scheduled meetings. Inframark will also schedule and attend special Board meetings, continued meetings, hearings and workshops, as requested. As the District Manager, Inframark will arrange for time and location and all other necessary logistics for such meetings. For each meeting, we will prepare agenda packages for transmittal to the Board and staff at least seven days prior to the Board's meeting. Inframark will attend up to twelve meetings a year at no additional cost to the District.

### Records:

Inframark has one of the largest teams of recording and administrative professionals in the business. Our Recording Department develops all the necessary advertisements for meetings. With the size and professionalism of our Recording Department, we can provide an extremely high level of service for all our District Management clients. This service includes an unmatched level of automation of records management. Our team is aided through our searchable database that allows for quick and accurate searches for past meeting minutes and efficient responses to public records inquiries. We have dedicated staff that are assigned to handle all public record requests and are highly experienced in ensuring compliance with the requirements of Florida Statutes.

Inframark provides full compliance with all the Florida Statutes Records Requirements of Chapter 119. This includes storage of records, access to records and coordination of all responses to public record requests. In addition, Inframark is in full compliance and follows all the requirements of the Florida Administrative Code Section R.1B-24.003(1)(a), which deals with the retention of District records.

Other critical aspects of our Records Management Services Include:

### Document Management:

Inframark utilizes three parallel processes to manage the documents of our clients.

- First, our electronic document management system allows access security settings to be placed on each file to prevent unauthorized editing or manipulation, thus ensuring the integrity of the document. The documents are maintained in a PDF format that is exportable to the client's Website for timely updates. We update records of District meetings (minutes, agendas and supporting documentation) to the District's Website in compliance with Florida Statutes. The document management system allows for ease of e-retrieval of documents using multiple search methods (document name, document number, document content, file type, author or the assigned retention category) to ensure all record requests are fulfilled in a timely fashion.
- Secondly, the process utilizes offsite storage of documents. Our vendor guarantees the secure storage and/or destruction of documents. Annually, upon completion of the audit, the accounting and accounts payable files are inventoried, boxed and sent to the secured offsite storage facility. All records are maintained within applicable statutory requirements.
- Finally, we maintain an onsite Master File for each client. The Master File contains previous years' audits, arbitrage reports, budgets, insurance policies and other important historical information.

# CLEAR PARTNERSHIPS

## **Disaster Contingency & Recovery:**

Disaster recovery is particularly important since the Districts we manage are in areas prone to hurricanes. Our hurricane preparedness procedure includes the following:

- Provisions for the compilation and storage of files and data required to perform critical client services
- Securing the physical office space with the protection of client files as a top priority
- Satellite phone for contingency communication with local team
- Internet and phone-based communication chains to update personnel
- The ability to shift client critical tasks and District Management services to alternate office locations both out of region or state if necessary
- Securing priority commitments from key contractors due to strong and lasting relationships

Because of the critical nature of the electronic information, we manage on behalf of our clients, Inframark emphasizes system security and has disaster recovery procedures in place to minimize the impact of storms, power outages and other similar events for the districts we serve. Our disaster recovery plans are continually updated in response to the changing needs of our business and the clients we serve.

In addition, Inframark utilizes sites certified to survive the equivalent of a Category 5 hurricane. District data is stored on servers that reside in Horsham, Pennsylvania. A full backup of all data is performed nightly and stored offsite at a remote location. Our Horsham facility is equipped with backup generator power. In addition to redundant equipment at our Houston IT center, we also have equipment co-located at other sites.

## **District Operations:**

Inframark has twenty-two (22) District Managers throughout the State of Florida with over 130 years of District Management experience in the Florida Community Development District market. Since Inframark utilizes a team approach in the provision of all its services, we share best practices and success stories from District clients across the state. We conduct monthly manager calls in which we discuss existing issues and develop and implement solutions that are in the best interest of our clients. All Inframark team members go through monthly training to keep them up to date on a wide variety of issues that impact District operations.

The District Management team has access to all records of their Districts which includes all current and past contracts entered into by the District Board of Supervisors. With our searchable data base, it is very easy for our District Managers to review past contracts to compare with existing or proposed contracts. This allows our District Management team to keep up with contract termination dates, scope of services and fee schedules in each contract. We work closely with the Attorney for each District to ensure compliance with contract requirements and make certain that when the Board decides to terminate a vendor contract, it is done in an appropriate manner avoiding legal issues for the District.

Inframark has dedicated personnel that work with each District Manager on the renewal of District insurance requirements, including review of District facilities and working with insurance providers to develop the most cost-effective approach to insuring District facilities.

Our District Management team is highly experienced in working with District Attorneys and District Engineers in the development of Request for Proposals (RFPs) for a wide variety of District construction, capital and maintenance projects including:

# CLEAR PARTNERSHIPS

- a) Development of complex bid and proposal packages
- b) Advertisement of the opportunities
- c) Analysis of the proposals and bids
- d) Development of recommendations for Board consideration

With the vast experience of our District Management team and the experience of Inframark across the State of Florida we have established excellent relationships with many vendors and contractors which brings a value-added service to the District.

## **Accounting and Reporting:**

Inframark performs all required financial accounting functions through solid workflow processes that are designed to integrate the traditional tasks associated with accounting transactions. Those traditional accounting tasks of disbursements, accounts payable, general ledger journal entries, trial balance reconciliation and budget monitoring are knitted together in such a way to achieve:

- Fast turnaround for vendor payments
- Smooth approvals for setting up capital requisitions
- Open communications to field operations staff
- Advanced preparation for independent audit field work

Our understanding of accounting processes allows us to quickly differentiate areas needing further work and those items that are routine in nature. While there is a great deal of accounting activity that goes into ensuring the individual transactions are properly recorded in the financial records of the District, we use our expertise, our knowledge and our experience to ensure accounting theory is applied in the best interest of the District. The importance of complying with statutory requirements as well as annual disclosure to lenders and bondholders is given an interconnected focus of everyone on our staff which is appreciated and respected by our industry partners. Our accounting staff is committed to a quality standard that allows the accounting activities of the District to properly reflect its financial condition. Inframark has over 300 years of combined experience on our Finance Team.

Our finance team constantly monitors various investments instruments in Qualified Public Depositories to determine the best investment plan for District funds. Our accounting team monitors the maturity dates of District investments and alerts the District Manager so that the options for reinvestment can be brought to the Board for direction.

## **Audits:**

Inframark has been working for decades with District auditors to make certain that each District audit is in full compliance with all GAAP and State accounting requirements. Inframark has a fully customized accounting software system that was designed for the Community Development District business that allows us to provide the most accurate and comprehensive information for all audit requirements.

# CLEAR PARTNERSHIPS

## **Budgeting:**

Inframark's customized CDD financial software system allows us to deliver options to our clients to customize their monthly financials and annual budget. Each District Manager works with their assigned accountants to develop a draft budget for consideration by the Board of Supervisors. The draft budget is based upon the input from the Board as to the goals they wish to achieve in the upcoming budget cycle.

The Inframark Assessment Team works with the District Manager and the Finance Team to present a complete picture of the revenue and expenses for each annual budget and how the proposed expenditure plan impacts the annual assessments. This approach allows our clients to see how their annual budget will impact residents (financially) and how each budget will achieve the goals set forth by the Board of Supervisors. The District Manager and Finance Team work closely with the Recording Department to ensure that all legal requirements for advertisements are met during the budgeting process. In addition, the District Manager will solicit input from the District Staff, District Engineer and District Attorney on any operation and maintenance expenditures that they believe need to be increased, decreased or eliminated as part of the new budget cycle.

## **Capital Program Administration:**

As part of the annual budgeting process, the District Manager will solicit information from the District Engineer and District Staff on any capital projects they believe should be included in the annual budget. This includes the timing, cost, and whether a capital expenditure will increase or decrease any operation or maintenance expenditure currently included in the budget.

Inframark has many years of experience in dealing with capital bond issues and bank qualified loans for District projects. We have extensive experience in working with bond underwriters, financial advisors and various lending institutions on the establishment and implementation of capital programs for District clients. We have established procedures for making certain that specific deadlines associated with bond documents and bank qualified loan requirements are met. We have an excellent reputation of successful implementation of a wide variety of financing programs for our District clients.

## **Assessments and Revenue Collection:**

Inframark has an exceptional record of administering annual assessment rolls for our District clients. This experience includes on roll and off roll collection. We have successfully worked with District legal counsel to accurately and timely collect off roll assessments when they are called for. We routinely conduct true up analysis for District tax rolls to ensure that all collections are being completed as per the Board's direction. Our Assessment Department also provides estoppel letters on an as needed basis at no cost to the District.

Our Treasury Services Group actively manages the revenue and investments for Districts across the State of Florida. This team ensures that the revenue generated by the District provides the financial platform to meet all its operational expenses and debt obligations. By working closely with the banking industry across our broad client base, we can provide economies of scale in the management of our banking relationships – which is passed along to the Districts we service in the form of favorably negotiated fees and service costs.

The depth and breadth of our special assessment knowledge lends opportunities to capture efficiencies and effectiveness in the collection of District revenues. We pride ourselves in our ability to interpret developer agreements to maximize cash flow for the District and satisfy cash requirements for running the operations of the District.

# CLEAR PARTNERSHIPS

## Effective Technology Tools and Support

### Avid Strongroom Accounts Payable Processing System

- Avid Strongroom is an Accounts Payable software that automates the process of invoicing.
- Allows users to approve invoices online, streamline invoice approval processes, and monitor invoice statuses.
- Avid Strongroom reduces the risk of entry errors as the system eliminates the task of manual invoice entry.
- Scalable for Growth: Enables Inframark to streamline the invoice-to-pay process while securely managing large volumes of bank accounts and check signatures.
- Reduced Fraud Risk: Limits chances of fraud with enforced controls and customized workflows.

### ADP Payroll Processing System

- ADP is an industry leader in Payroll, HR, and Tax solutions with over 75 years in the industry and 1,000,000 companies currently using ADP solutions.
- Allows for seamless payroll processing including direct deposit, physical paychecks, W-2, etc.
- Employee and manager self-service portal online and with a mobile app, allows users to access their information and records.
- Data Security: ADP is an industry leader in data security and business protection,
- Fully integrated in Inframark's Accounting software, allowing data reporting capabilities.

### Microsoft Business Central Accounting Software

- Industry leader in Enterprise Resource Planning and Accounting Software.
- Cloud-Based software that ensures Inframark's districts will have current Accounting software experience, with monthly updates from Microsoft.
- Manages finances end to end: oversee your budget, accelerate month-end and year-end close, automate bank reconciliation, use unlimited dimensions, track fixed assets, and more.
- Financial reporting: Allows for scheduled financial reports based on client and internal requirements.
- Power Bi Compatibility: Allows advanced analytics by integrating Power Bi Data driven Dashboards.

## TECHNOLOGY DRIVES OUR COMMUNITIES

# CLEAR PARTNERSHIPS

## Staffing

Inframark is the only District Management firm with its own Human Resource team.

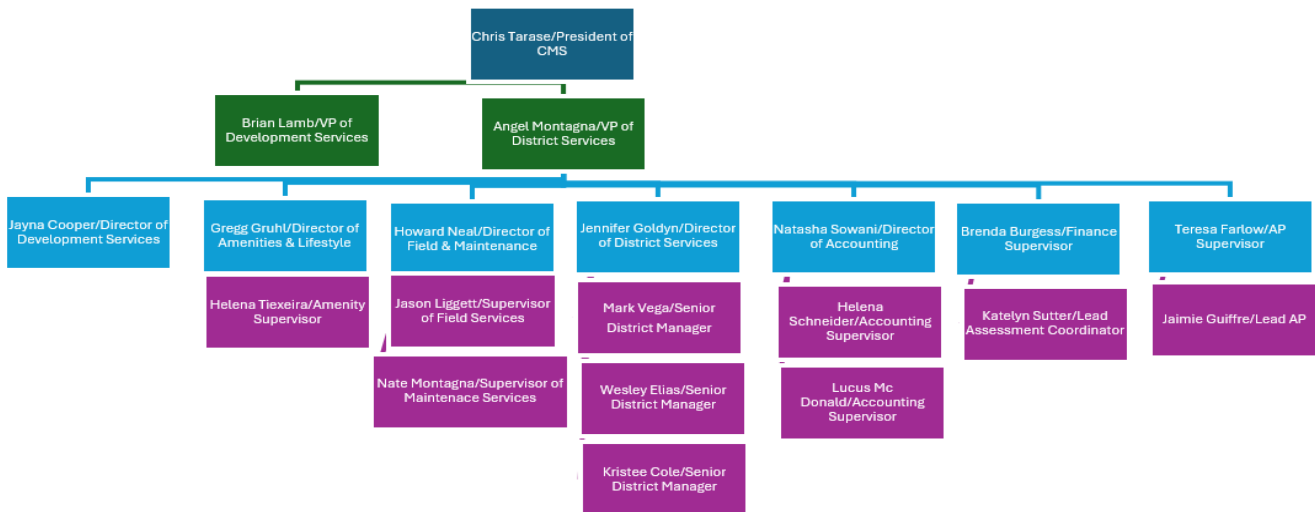
This means the following:

- Our employees are fully vetted prior to hiring
- Employees have regular performance evaluations
- We follow a progressive disciplinary policy
- We provide exceptional benefits program for our employees that other firms do not offer
- Employees have a bonus program for exceptional performance
- We offer a management bonus for employees who are responsible for financial performance goals
- 401(k) retirement plans
- Ongoing training and training incentive programs
- Tuition reimbursement opportunities
- In-house safety team and continuous safety training program for all employees

Inframark places the highest value on its employees and provides a work environment and benefits that are designed to encourage long-term employment with Inframark.

In terms of the personnel assigned to your District, Inframark will ensure to the highest degree possible that we will retain the same personnel for your District.

### Organization Chart 2026



# CLEAR PARTNERSHIPS

## District Management:

**Jennifer Goldyn**, Director of District Services. Jennifer will work with the assigned team to address any issues that may develop. She is responsible for the overall performance of the Inframark District Management team. Ms. Goldyn has 10 years of district management experience and currently manages two (2) Districts, allowing her to be available to her team and Inframark clients. Her background includes over 10 years in property management and 2 years in construction management. She holds a bachelor's in business and marketing and has held a Real Estate License.

**Kristee Cole, Senior District Manager**, is a seasoned Senior District Manager with nine years of experience in the CDDs, serving in both management and administrative capacities. Her well-rounded background provides her with a comprehensive understanding of district operations, governance, and financial oversight. Kristee's extensive industry knowledge, combined with her strategic and solutions-oriented approach, makes her exceptionally capable of leading districts of any size or complexity. She has a proven track record of successfully guiding newly formed residential Boards, stabilizing and turning around districts facing financial challenges, and effectively managing vendor relationships to ensure operational excellence.

## Recording Services:

**Janice Swade, Recording Secretary**, has been working with Inframark for 14 years as a District Recording Secretary. Her previous experience includes 13 years with The Port Authority of New York and New Jersey, working in various administrative and clerical positions, including that of Senior Executive Secretary with the Deputy Director of the World Trade Center. Ms. Swade is extremely thorough in her attention to detail with all the Districts she serves.

## Accounting/Finance Team:

**Teresa Farlow, Accounts Payable Supervisor**, has been with Inframark since 2018 working closely with vendors, field managers, District Managers, Developers and accountants. Teresa is proficient in the accounts payable process, processing over 10,000 invoices annually.

**Natasha Sowani, Director of Accounting**, is a graduate of the University of South Florida with a bachelor's degree in Business Management and a minor in Accounting with over 20 years of accounting experience. Her career began in college while working at a small tax and accounting firm, then transitioned to one of our competitors where she gained industry experience in governmental accounting for CDD's. While there she managed several of their offices throughout the state.

**Brenda Burgess, Finance Supervisor**, began working in the special district industry in 1996 under the leadership of Gary Moyer. Brenda's responsibilities included providing administrative, management, accounting, finance and assessment services for the business. Brenda was promoted to finance supervisor and oversees all finance activities, including budget templates, assessment rolls, estoppels, and other finance and bond-related matters.

# CLEAR PARTNERSHIPS

## Sample Scope of Services

All services required for the management of a community development district under Chapter 189, Florida Statutes, Chapter 190, Florida Statutes and all other applicable Federal, Florida, and local laws (including the ordinance(s) and resolution(s) relating to the District and any interlocal agreements). All services should be completed on a timely basis.

### District Management Services

#### A. Meetings, Workshops, and Hearings

1. Organize, attend, conduct, and provide minutes for all meetings, workshops, and hearings of the District.
2. Schedule such meetings, workshops, and hearings.
3. Coordinate the time, location, and all other necessary logistics (including providing conference call numbers or telephonic or virtual meeting technology).
4. Send or publish notices for meeting, workshop, hearing, and election pursuant to Florida law.
5. Provide agenda packages and meeting materials in the form requested by the Board.

#### B. District Operations

1. Act as the primary point of contact for District-related matters.
2. Maintain an action item list of tasks and follow ups from meetings.
3. Coordinate with the District's ADA document remediation vendor (and website vendor) to ensure the District's website has the content required by Florida (and is on the website for the appropriate duration) and includes any additional information or materials requested by the Board.
4. Consult with and advise the Board on policies, services, and responsibilities of the District and implement the Board's policies and direction.
5. Make recommendations and assist in matters relating to solicitation (competitive bidding, request for proposals, request for qualifications, etc...), approval, rejection, amendment, expiration, renewal, and termination of contracts for services, goods, supplies, or materials in accordance with the District's rules and Florida law.
6. Provide contract administration services. Such services include:
  - i. ensuring District vendors comply with the terms and conditions of a contract
  - ii. coordinating any changes to the contract that might occur over the course of the contract
  - iii. coordination with the District Engineer, District Counsel, or construction/project manager with respect to the work performed or contractual obligations
  - iv. coordinating the closeout/final payment after the vendor performed their services

The logo for CLEAR PARTNERSHIPS is displayed in large, white, sans-serif capital letters. The background of the logo is a photograph of a modern, multi-story building with a fountain in the foreground, set against a twilight sky.

7. Perform regular on-site visits to District grounds to generally evaluate and inspect the condition of the property and infrastructure and meet with District vendors and staff. Observe and report concerns or questions relating to District grounds.
8. Monitor certificates of insurance as needed per contracts.
9. Prepare and follow risk management policies and procedures.
10. Recommend and advise the Board, in consultation with the District Engineer of the appropriate amount and type of insurance for all District assets and maintenance responsibilities are included and procure and renew all applicable insurance, including but not limited to, General Liability Insurance and Directors and Officers Liability Insurance.
11. Process and assist in investigation of insurance claims, in coordination with District Counsel.
12. Negotiate on behalf of the District (when specifically authorized by the Board) with governmental entities, vendors, contractors, residents, insurance representatives, and other parties.
13. Prepare, on or before October 1 of every year, an annual inventory of all District owned tangible personal property and equipment in accordance with all applicable rules and standards.
14. Ensure compliance with all statutes affecting the District by performing the following tasks (and such other tasks required by law but not specifically identified herein):
  - i. file the name and location of the Registered Agent and Registered Office location annually with Department of Economic Opportunity and the City/County.
  - ii. provide the regular meeting schedule of the Board to the City/County.
  - iii. prepare and file annual public depositor report.
  - iv. file all required financial reports (including the Annual Audit) to the Department of Revenue, Auditor General, the City/County, and other governmental agencies with jurisdiction in compliance with Florida law.
  - v. transmit Public Facilities Report and related updates to appropriate agencies.
  - vi. file request letter to the local Supervisor of Elections for number of registered voters as of April 15, each year. Report annually the number of registered voters in the District by June 1, of each year.
  - vii. serve as the contact person for the State Commission of Ethics for Financial Disclosure coordination.
  - viii. maintain the District Seal.

# CLEAR PARTNERSHIPS

## C. Accounting, Reporting, and Audit Support

1. Implement an integrated management reporting system compliant with Generally Accepted Accounting Principles (GAAP) and Government Accounting Standards Board (GASB) for government and fund accounting which will allow the District to represent fairly and with full disclosure the financial position of the District. The District's accounting activities should be overseen by a degreed accountant.
2. Track and oversee the District's general, capital, reserve, and bond fund activities and provide monthly and annual financial statements (including budget to actual summary).
3. Administer the processing, review, approval, and timely payment of all bills, invoices, and purchase orders (including construction requisitions).
  - i. All vendor invoices, receipts, application for payments, etc. must be provided to the Board within 30 days of receiving it.
4. Recommend and implement investment policies and procedures pursuant to Florida law, and provide cash management services to obtain maximum earnings for District operations through investment of surplus funds to the State Board of Administration.
5. Prepare reports as appropriate under applicable law, accounting standards, and bond trust indenture requirements.
6. Provide audit support to auditors for the required Annual Audit and ensure completion of the Annual Audit and Annual Financial Statements in compliance with Florida law.
7. Assist the District in obtaining and completing a Reserve Study and complying with the findings and direction of the Board.

## D. Budgeting

1. Prepare and provide for a proposed budget for Board approval and submission to the City/County in compliance with Florida law.
2. Prepare final budget and backup material for and present the budget at all budget meetings, workshops, and hearings.
3. Administer the adopted budget and prepare budget amendments on an ongoing basis as needed.

## E. Assessments & Revenue Collection

1. Develop and administer the annual assessment roll for the District. This includes administering the tax roll for the District for assessments collected by the County tax collector and administering assessments for off tax roll parcels/lots.
2. Provide payoff information and pre-payment amounts as requested by property owners and collect prepayment of assessments as necessary.
3. Issue estoppel letters as needed for property transfers.

# CLEAR PARTNERSHIPS

4. Maintain the District's Lien Book, in which is recorded the details of any District debt and the related debt service assessments. The Lien Book will account for all District debt and show the allocation of debt principal to assessed properties within the District.

## F. Bond Compliance and Dissemination Agent

1. Oversee and implement bond issue related compliance. For example:
  - i. coordination of annual arbitrage report as required.
  - ii. transmittal of the Annual Audit, budget, and other required information to the trustee and other parties as required.
  - iii. annual/quarterly disclosure reporting as required.

## G. Records

1. Maintain the "Record of Proceedings" for the District at a location within the boundaries of the County in which the District is located and include meeting minutes, resolutions, and other records required by law and provide access to such records in compliance with Florida's public records laws.
2. Serve as the District's Records Management Liaison Officer for reporting to the Department of Library and Archives pursuant to Section 257.36(5)(a), Florida Statutes.
3. Serve as the District's designated custodian of all public records of the District and comply or coordinate the compliance with the responsibilities imposed by Chapter 119, Florida Statutes. For example:
  - i. protect the integrity, confidentiality, or exemption of all public records.
  - ii. respond to public records requests in a timely, professional, and efficient manner.
  - iii. recommend best practices and services to ensure all public records of the District (including emails of the Board) are preserved pursuant to Florida law requirements.

## H. Board Email Backup and Retention Services

1. Provide for or coordinate with a third-party vendor to ensure emails of the Board are backed up and retained in compliance with Florida's public records laws.
  - i. If such services are not provided directly, then the District will contract directly with such third party vendor and the costs of such services will be borne by the District.

# CLEAR PARTNERSHIPS

## **I. Field Services**

1. Perform a monthly inspection of the District's property and maintenance responsibilities.
2. Provide monthly inspection report with pictures and recommendations for repairs to the District; provided however, the Service Company shall not be responsible for performing such repairs unless otherwise agreed to by the parties in writing; and
3. Notify the District about deficiencies in the services performed by its vendors.

## **I. Maintenance/Porter Services – Available upon mutually agreed upon Scope and Pricing**



# Governmental Management Services

*Serving Florida's Communities*

April 7<sup>th</sup>, 2026

Suncoast Community Development District Board of Supervisors  
 c/o Ms. Kathryn C. Hopkinson, District Counsel  
 Straley Robin Vericker  
 1510 West Cleveland Street  
 Tampa, Florida 33606  
 Via email to [Khopkinson@srvlegal.com](mailto:Khopkinson@srvlegal.com)

RE: Proposal for District, and Field Management Services

Dear Ms. Hopkinson,

Governmental Management Services-Tampa L.L.C. ("GMS") is pleased to provide for your review our Proposal associated with providing District, and Field Management Services to the Suncoast Community Development District ("CDD"). We believe the Proposal demonstrates that we are the best choice for this project. Here are some of the reasons why:

- ❖ We are the leader in the Community Development District industry. We provide district management services to 290+ CDDs across the State of Florida.
- ❖ We have a team of management, financial, administrative, and operations professionals who are extremely qualified to provide these services and meet time and budget requirements.
- ❖ We have a proven approach, methodology, and philosophy towards providing these services that reflect our commitment and ability to deliver comprehensive services that exceed the expectations of our clients.
- ❖ We also have the ability to respond to individual client needs efficiently, effectively, and professionally. Our approach to providing the services for each of the responsibilities described in this RFP is to fully understand them and provide them in a manner that meets all the statutory requirements, customized to the approach preferred by the Board of Supervisors.

We thank you for this opportunity to submit our Proposal and would be happy to provide any additional information if requested. Please feel free to contact me at (865) 603-5101 or via email at [DMossing@gmstnn.com](mailto:DMossing@gmstnn.com) if you have any questions or need additional information.

Sincerely,

Darrin Mossing  
 GMS President

**Enclosures**

ORLANDO

219 E. Livingston St.  
 Orlando, FL 32801  
 (407) 841-5524

JACKSONVILLE

1200 Riverplace  
 Boulevard, Suite 705  
 Jacksonville, FL 32207  
 (904) 288-7667

ST. AUGUSTINE

50 Ellis Street,  
 Suite 208  
 St. Augustine, FL 32095  
 (904) 288-7667

ST. AUGUSTINE

475 West Town Place,  
 Suite 114  
 St. Augustine, FL 32092  
 (904) 288-7667

FT. LAUDERDALE

5385 N. Nob Hill Road  
 Sunrise, FL 33351  
 (954) 721-8681

TAMPA

4530 Eagle Falls Place  
 Tampa, FL 33619  
 (813) 344-4844

PALM COAST

393 Palm Coast  
 Parkway SW, Suite 4  
 Palm Coast, FL 33137  
 (904) 940-5850

KNOXVILLE

1001 Bradford Way  
 Kingston, TN 37763  
 (865) 717-7700

Agenda Page 130

# District and Field Operations Management Services Proposal

## Prepared For The Suncoast Community Development District:



# GOVERNMENTAL MANAGEMENT SERVICES-TAMPA, LLC

DISTRICT AND  
FIELD OPERATIONS  
MANAGEMENT  
SERVICES



[www.govmgtvc.com](http://www.govmgtvc.com)

Submitted  
April 7<sup>th</sup>, 2026

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# COMPANY INFORMATION

**Governmental Management Services ("GMS")** is a family of limited liability companies that was established for the purpose of providing district management services to Special Taxing Districts. With encouragement from industry professionals and the development community, GMS was created to provide an alternative to the existing district management companies. GMS currently has offices in St. Cloud, Orlando, Tampa, Sunrise, Miami, Tallahassee, Port St. Lucie, St. Augustine, Palm Coast, Florida, and Knoxville, Tennessee. Company personnel who would be providing services are generally determined by geography of the District and required services. However, everyone at GMS works together to provide the most efficient, effective and comprehensive management services possible. GMS currently manages over 290 Community Development Districts across the State of Florida and fully understands the requirements of Chapter 190. As described in Section 3, the personnel at GMS are very well known and respected by people involved with Community Development Districts. Many of the personnel have worked with Investment Bankers, Bond Counsel, District Counsel, Engineers, Developers, and Boards of Supervisors across the State of Florida.

They have provided management, financial, administrative, and operational services to over 290 special taxing districts and homeowners associations. Our greatest strength is our ability to respond to individual client needs quickly, efficiently and professionally.

**GMS WAS ESTABLISHED TO PROVIDE THE MOST EFFICIENT, EFFECTIVE AND COMPREHENSIVE MANAGEMENT SERVICES FOR COMMUNITY DEVELOPMENT DISTRICTS IN THE STATE OF FLORIDA.**



# HOW WE WORK

Established in 2004, Governmental Management Services has over 250 full-time and part-time employees and has offices across the State of Florida. Services are provided by seasoned professionals with well over 1,000 years of combined Community Development District management experience. Our commitment to serving our clients and providing the most efficient, effective, and comprehensive management services for Community Development Districts continues to fuel our growth.

## Statement of Qualifications

GMS is the best-qualified provider of district management services because of the experience of the personnel who will be providing the management services for the District. GMS brings a wealth of experience in management, administration, accounting, financial reporting, field operations, and assessment certifications.

GMS focuses exclusively on the services necessary for the proper management of Community Development Districts. Our staff includes managers, accountants, financial analysts, recording secretaries, and operations managers all with experience with Community Development Districts and other special districts. We offer integrated management services including:

- General Management
- Recording Secretary Services
- Accounting and Financial Reporting
- Assessment Roll Administration
- Field Operations Management
- Amenity Management
- Facility Maintenance
- Dissemination Agent Services
- Utility Billing
- Other Services

## FULLY INTEGRATED SERVICES



These management services are being provided by the principals of GMS to over 290 Community Development Districts in 25 counties across the State of Florida.

# OUR VALUES

## MISSION

The goal of GMS is to provide the most efficient, effective, and comprehensive management services for Community Development Districts in the State of Florida.



## CORE VALUES

Governmental Management Services' greatest strength is its ability to respond to individual client needs quickly, efficiently, and professionally. Listed below are our GMS core values:



### **Customer Commitment**

*We keep customer needs at the center of all that we do to provide a superior customer experience.*



### **Integrity**

*We are honest, open, ethical, and fair.*

*People trust us to do what's right.*



### **Teamwork**

*We win together, not alone.*

*We work together, across divisions, to meet the needs of our customers.*



### **Passion and Drive**

*We are proud of the services we provide.*

*We play to win and strive to help our customers do the same.*



### **Empower Individuals**

*Our employees set us apart.*

*We value our employees, encourage their development, and reward their performance.*



### **Quality**

*Details matter.*

*We provide consistent and unsurpassed service that, together, deliver premium value to our customers.*

# CONTACT INFORMATION

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**Corporate Office:**

1001 Bradford Way  
Kingston, TN 37763  
(865) 717-7700

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As the largest CDD Management firm in the State of Florida, GMS is prepared to provide all CDD Management services directly and does not contemplate the need to subcontract services.

**GMS - South  
Florida**

5385 Nob Hill Road  
Sunrise, FL 33351  
(954) 721-8681

**GMS -  
Central Florida**

219 E. Livingston St.  
Orlando, FL 32801  
(407) 841-5524

**GMS - Tampa**

4530 Eagle Falls Place  
Tampa, Florida 33619  
(813) 344-4844

435 10<sup>th</sup> Avenue West,  
Suite 200  
Tampa, Florida 34221

**GMS - North  
Florida**

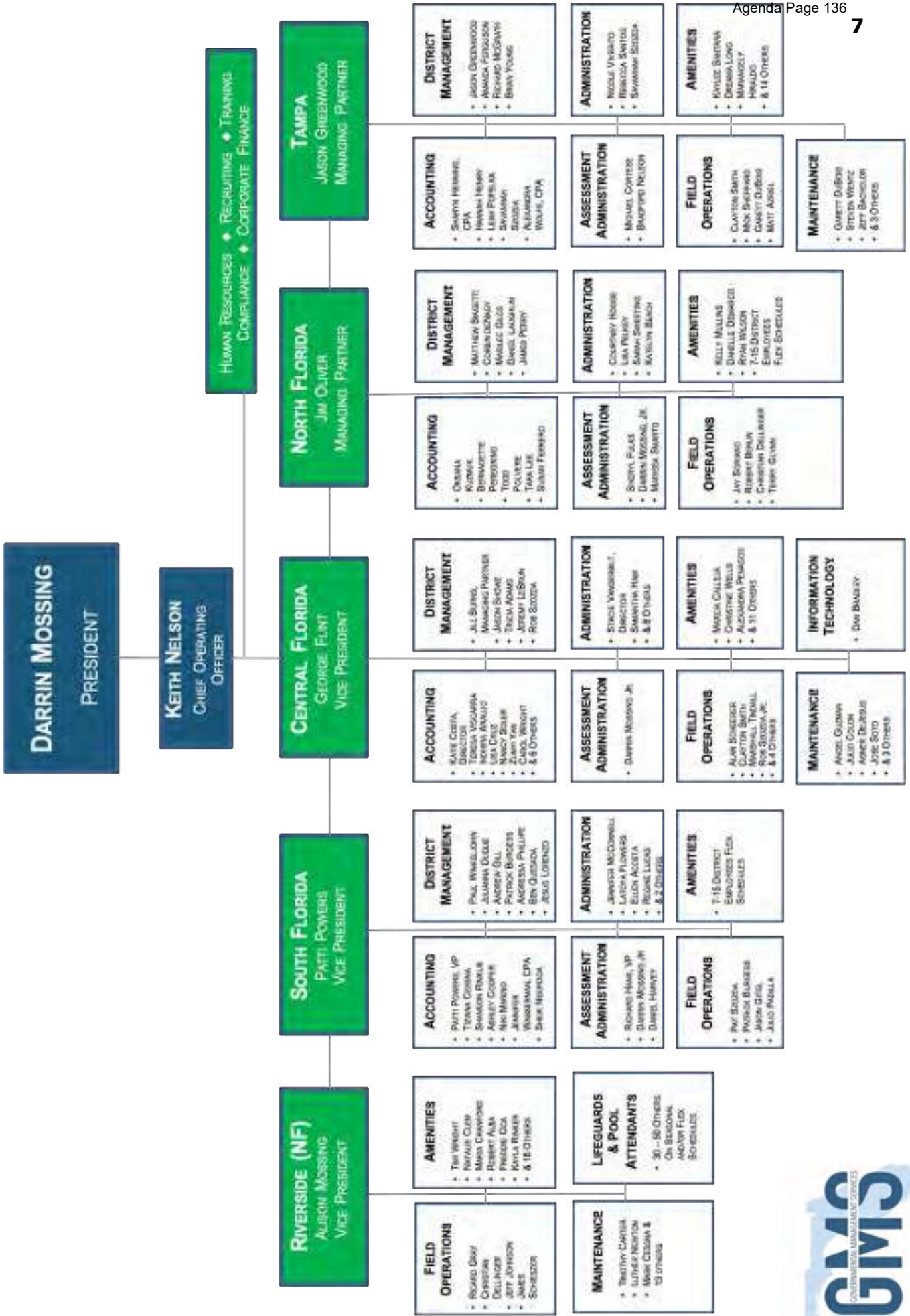
475 West Town Place,  
Suite 114  
St. Augustine, FL 32092  
(904) 940-5850

1200 Riverplace  
Boulevard  
Jacksonville, FL 32207

393 Palm Coast  
Parkway SW, Suite 4  
Palm Coast, FL 32137

We have additional satellite offices  
throughout the State of Florida

# GOVERNMENTAL MANAGEMENT SERVICES



# OUR TEAM



**Although technology has tremendously impacted how services are provided for nearly every business today, GMS realizes an organization is only as good as the individuals working within it. If an organization is not able to retain hardworking, knowledgeable and dedicated employees that understand their client's needs, it is most certain to fail. It is for this reason that GMS has focused a significant effort on recruiting and retaining the best in the district management industry**

## STATEMENT OF STAFF CONSISTENCY

The District Management Team proposed remains the same for the duration of the contracts. Any changes in the District Management Team will be discussed and approved by the Boards of Supervisors. Members of the management team have worked together for years, and there is complete trust and loyalty in their abilities to provide the most efficient, effective and professional management services possible. In addition, these types of long-term personal relationship among GMS staff are reassuring to our clients because personnel turnover in any organization is extremely detrimental to its ability to provide the necessary services.

*"GMS realizes an organization is only as good as the individuals working within it."*

# Proposed GMS District Management Service Team

Trusted & Service Oriented



**Jason Greenwood**  
Partner,  
District Manager



**Leah Popelka**  
District Accounting



**Richard McGrath**  
District Manager



**Matt Azriel**  
Field Operations  
Manager



**Nicole Viverito**  
District Administration

**GMS-TAMPA**  
JASON GREENWOOD  
MANAGING DIRECTOR

See Page 7  
Of Our Proposal  
For The Rest  
Of The  
GMS Organization

<p><b>DISTRICT MANAGEMENT:</b></p> <ul style="list-style-type: none"> <li>• JASON GREENWOOD</li> <li>• AMANDA FERGOSON</li> <li>• RICHARD McGRATH</li> <li>• BRIAN YOUNG</li> </ul>	<p><b>DISTRICT ACCOUNTING:</b></p> <ul style="list-style-type: none"> <li>• SHARYM HENNING CPA</li> <li>• HANNAH HENRY</li> <li>• LEAH POPELKA</li> <li>• SIOZDA</li> <li>• ALEXANDRA WOLFE CPA</li> </ul>	<p><b>DISTRICT ADMINISTRATION:</b></p> <ul style="list-style-type: none"> <li>• NICOLE VIVERITO</li> <li>• BRIGANNAH</li> <li>• SIOZDA</li> <li>• REBECCA SANTOS</li> </ul>	<p><b>ASSESSMENT ADMINISTRATION:</b></p> <ul style="list-style-type: none"> <li>• DARRIN MOSSING JR.</li> <li>• MICHAEL CORTIASE</li> <li>• LEAH POPELKA</li> </ul>	<p><b>DISTRICT AMENITY MANAGEMENT:</b></p> <ul style="list-style-type: none"> <li>• KAYLEE SANTANA</li> <li>• DREAMA LONG</li> <li>• MARANGELY HIRALDO</li> </ul>	<p><b>DISTRICT FIELD OPERATIONS:</b></p> <ul style="list-style-type: none"> <li>• CLAYTON SMITH</li> <li>• NICK SHEPARD</li> <li>• GARETT DUBOIS</li> <li>• MATT AZRIEL</li> </ul>	<p><b>DISTRICT FIELD MAINTENANCE:</b></p> <ul style="list-style-type: none"> <li>• JEFF BACHELOR</li> <li>• GARETT DUBOIS</li> <li>• STEVEN WENTZ</li> <li>• &amp; 3 OTHERS</li> </ul>
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# DISTRICT MANAGEMENT SERVICES

**THE FOLLOWING MANAGEMENT SERVICES ARE TYPICALLY PROVIDED TO ENSURE THE DISTRICT OPERATES IN ACCORDANCE WITH ALL APPLICABLE STATUTES, LAWS, RULES AND REGULATIONS:**

- Attend, record, and conduct all regularly scheduled Board of Supervisors Meetings including landowners' meetings, continued meetings, and workshops.
- Present the District's annual budget in accordance with Chapter 190, Florida Statutes.
- Ensure the District is in compliance with administrative and financial reporting for CDDs.
- Correspond and communicate with the Board of Supervisors and Staff to respond to the various needs of the District and Community.
- Review and approve agendas for circulation to the Board of Supervisors.
- Review and approve the annual budget, the annual audit, and monthly disbursements.
- Review annual insurance policy with the District so that it maintains proper insurance coverage.



**EDUCATION**

Ohio University, 1988,  
Bachelor of Science,  
Major: Accounting

**EXPERIENCE**

38+ Years

- President and Founder – GMS Organization
- Corporate Operations & District Management

# DARRIN MOSSING

## PRESIDENT

Darrin Mossing is the President and Founder of the GMS organization. Mr. Mossing graduated from Ohio University with a Bachelor’s degree in accounting in June 1988 and began his career as a staff accountant on September 1, 1988, for the Indian Trace Community Development District. In November 2004, Mr. Mossing established the GMS organization, which has grown to over 290 CDDs, Homeowners Association, and other Special Taxing Districts across the State of Florida.

# JASON GREENWOOD

## MANAGING PARTNER

Jason Greenwood provides management services to CDDs and property owners associations throughout the State of Florida. Mr. Greenwood has been committed to GMS since 2017, is a licensed Community Association Manager, and operates out of the Tampa, Florida office. Mr. Greenwood has BA degrees in Business and Finance with a minor in Marketing from Ashford University in Clinton, Iowa, and an MBA in Business Administration, specialization in Finance, from Lynn University in Boca Raton, Florida.

**EDUCATION**

B.A., Business, Finance,  
Marketing minor,  
Ashford University  
MBA, specialization in  
Finance, Lynn University

**EXPERIENCE**

9+ Years

- District Management
- Assessment Roll Administration

# RICHARD MCGRATH

## DISTRICT MANAGER

Richard McGrath also provides management services to CDDs throughout the State of Florida. Mr. McGrath is a licensed Real Estate Agent and operates out of our Tampa, Florida Office. He has a wealth of experience in customer service and management. Mr. McGrath earned his Bachelor's Degree in Business Administration from the University of Florida and continued his education by earning his Master's Degree in International Business also from the University of Florida.

# ADMINISTRATIVE SERVICES

**Amanda Ferguson** leads our recording administration department. Amanda prepares agenda packages, meeting notices, public records administration, statutory compliance, and various other required administrative services. She is an Administration Management Professional, who has been committed to GMS since its establishment in 2004. Mrs. Ferguson has performed various functions in her 20+ years with GMS; including amenity center management at premier North Florida communities, contract compliance, managing programs and special events, lifeguard management, and transcription of board meetings. Mrs. Ferguson currently provides transcription and administrative services to 20 Community Development Districts in the Tampa Bay, Central Florida, and Southwest Florida Regions. **Nicole Viverito** joined the GMS organization in 2022 as a CDD Recording Administrator; she is known for her compliance discipline and customer service orientation.

**THE FOLLOWING ADMINISTRATIVE SERVICES ARE TYPICALLY PROVIDED TO ENSURE THE DISTRICT OPERATES IN ACCORDANCE WITH ALL APPLICABLE STATUTES, LAWS, RULES AND REGULATIONS:**

- Prepare agenda packages for transmittal to Board of Supervisors and staff seven days prior to Board of Supervisors' Meeting.
- Provide minutes for all Board of Supervisors' Meetings, including landowners' meetings
- Ensure compliance with all administrative statutes affecting the District which include but are not limited to :
  - Publish and circulate the annual meeting notice.
- Report annually the number of registered voters in the District by June 1 of each year.
- Maintain "Record of Proceedings" for the District within the County that the District is located which includes meeting minutes, agreements, resolutions, and other required records.
- Transmit Registered Agent information to Florida Commerce and local governing authorities.
- File Ordinance or Rule establishing the District to Florida Commerce.



# ASSESSMENT ROLL **CERTIFICATIONS & ADMINISTRATION**

**Darrin Mossing Jr, and Michael Cortese** perform our assessment administration services for the Tampa, Central, and North Florida Divisions.

## **Our GMS Services Include:**

- Develop and administer the annual assessment roll for the District. This includes administering the tax roll for the District for assessments collected by the County tax collector and administering assessments for off-tax roll parcels/lots.
- Provide payoff information and pre-payment amounts as requested by property owners and collect prepayment of assessments as necessary
- Issue estoppel letters as needed for property transfers.
- Maintain the District's Lien Book, which records the details of any District debt and the related debt service assessments. The Lien Book will account for all District debt and show the allocation of debt principal to assessed properties.



# ACCOUNTING SERVICES

**Alexandra Wolfe** manages the accounting and financial reporting for our clients. She is a Certified Public Accountant with over 15 years of accounting and financial reporting experience with Community Development Districts across the State of Florida. Ms. Wolfe’s experience includes financial statement preparation, payroll, budget preparation, preparation of annual audit reports, statutory and bond compliance. She has a Bachelor of Business Administration Degree in International Business from George Washington University. Ms. Wolfe also has experience as an auditor completing annual reports required for CDDs.

## EDUCATION

B.S. in Accounting

## EXPERIENCE

25+ Years

- Accounting
- Financial Reporting

13+ Years CDD Accounting

## EDUCATION

B.A. in International Business, George Washington University

## EXPERIENCE

21+ Years, CPA

- Accounting
- Financial Reporting

**Leah Popelka** has over 25 years of experience in accounting and financial reporting. Ms. Popelka serves as District Accountant to 15+ CDDs and Homeowner Associations. She has a Bachelors Degree from in Accounting and is certified in financial modeling and valuation services. Leah has 13+ years in accounting for Community Development District clients.

## THE FOLLOWING FINANCIAL SERVICES ARE TYPICALLY PROVIDED TO ENSURE THE DISTRICT OPERATES IN ACCORDANCE WITH ALL APPLICABLE STATUTES, LAWS, AND RULES AND REGULATIONS:

- Establish Governmental Fund Accounting System per the Uniform Accounting System prescribed by the Florida Department of Financial Services for Government Accounting. This system includes preparing monthly balance sheet and income statement(s) with budget to actual variances.
- Prepare accounts payable and present them to the Board of Supervisors for approval or ratification.
- Prepare annual budget for review and approval by the Board of Supervisors.
- Transmit the proposed budget to local governing authorities 60 days before adoption.
- Prepare year-end adjusting journal entries in preparation for the annual audit by an Independent Certified Public Accounting Firm.
- Maintain checking accounts with qualified public depository selected by the Board of Supervisors.
- Ensure compliance with financial and accounting statutes affecting the District which include but are not limited to:
  - Complete annual financial audit report within 9 months after the fiscal year end.
  - Circulate annual financial audit report and annual financial report to appropriate governmental agencies.
- Prepare annual public depositor report.
- Oversee and implement bond issue related compliance, i.e., coordination of annual arbitrage report, transmittal of annual audit and budget to the trustee, transmittal of annual audit to bond holders and underwriters, annual/quarterly disclosure reporting, etc.
- Transmit Public Facilities Report to the appropriate agencies
- Bind necessary insurance for the District, which includes liability, property, workers’ compensation, etc.

# OPERATIONS MANAGEMENT SERVICES

GMS provides operations/field management services to 80+ Districts throughout Florida under the direction of **Clayton Smith**. He has a deep, and lengthy family history connected to CDD management, and has owned and operated his own maintenance company in the Central Florida area which carried out various undertakings, primarily for CDDs. He is a proud alumnus of the Florida State University. **Mick Sheppard** is our Operations Maintenance Manager, overseeing maintenance projects and providing maintenance services. Mick is equipped and capable of handling almost all CDD maintenance needs and specializes in maintenance projects specific to CDDs. Mick has a lengthy background in various maintenance services including but not limited to plumbing, HVAC repair, grounds maintenance, and property maintenance.

## PROPER OPERATION OF THE DISTRICTS INCLUDE:

- Administer and manage maintenance contracts for landscaping, stormwater, wastewater and reuse systems management
- Respond to resident and Board of Supervisors inquiries regarding Maintenance Operations
- Coordinate and implement maintenance projects throughout the community with vendors
- Conduct site visits (day and nighttime) to ensure satisfactory operation of the district and prepare periodic reports to the Board.
- Review and approve construction contracts, change orders, payment request, etc. during construction phase
- We can also develop landscaping RFPs as requested at an additional hourly or flat rate fee.

# FACILITY REPAIR & MAINTENANCE SERVICES

GMS has an in-house Facility repairs and maintenance department providing fully insured maintenance services in Tampa, Central Florida, and North Florida territories. Small to medium-size maintenance requests are coordinated through the District Manager and/or Field Operations Manager at the direction of the Board of Supervisors.

# AMENITY MANAGEMENT & LIFESTYLE PROGRAMMING

**Kaylee Santana** is the Assistant Director of Amenity Management in Tampa. Kaylee brings over five years of experience in Amenity Management and has proudly served as Assistant Director for the past two years. She holds a Bachelor's degree in Health Administration and Management from DeVry University. As the Training Manager for the Amenities Department at GMS-Tampa, Kaylee plays a key role in developing team members and ensuring operational excellence across multiple communities. Her strong foundation in CDD operations and proven leadership skills enable her to effectively guide and support a large, dynamic team.

**Dreama Long** is the Assistant Director of Amenity Management in Tampa. Dreama has a wealth of leadership and operational experience at GMS-Tampa. Before entering the field of amenity management, Dreama dedicated over 20 years to law enforcement in Norfolk, Virginia, with specialized expertise in narcotics, homicide, and hostage negotiation. After retiring from law enforcement, Dreama relocated to Florida and discovered a new passion in property management. She served as Chairman of her CDD Board for several years, gaining valuable insight into community operations and governance. Today, as Assistant Director of Amenity Services, Dreama applies her extensive leadership experience and problem-solving skills to guide the Amenities Department. She is committed to fostering a healthy, collaborative work environment and ensuring exceptional service across all communities.



GMS has significant experience with highly amenitized CDD communities and is flexible regarding the approach taken to staffing, managing, and operating amenities. We typically see one of three approaches taken to amenity management:

- 1) District contracts with GMS for operations
- 2) District contracts with a third-party company for operations
- 3) District directly employs staff for operations

**UNDER THE FIRST APPROACH, THE FOLLOWING SERVICES ARE TYPICALLY PROVIDED  
BY GMS TO ENSURE A FIRST CLASS, AMENITY CENTERED COMMUNITY:**

- Recruit, hire, train, and monitor Clubhouse and Facilities staff.
- Assume responsibility to manage a vibrant schedule of activities, events and lifestyle programming. GMS is structured to take a regional approach to serving its clients, but this structure does not preclude us from assigning the most talented and qualified individuals, regardless of their location, to appropriate roles.
- Communicate lifestyle opportunities and residential services information to owners and potential residents.
- Promote voluntary compliance with District rules, regulations and policies by communicating with residents.
- Maintain excellent level of customer service.
- Monitor the use of the amenities including resident barcode passes, security cameras, and other means of safeguarding the District.
- Maintain excellent level of customer service.
- Coordinate with vendors, contractors, internal and external stakeholders to ensure smooth operations of day to day and special activities.
- Maintain all relevant records of incidents, inspections, revenue, and other information as required by the District.
- Assist with budget preparation and reports, policy recommendations and enforcement, safety and/or security recommendations, collection of rental fees, maintaining records as needed.

Under the second and third approach, although the above services would not be provided directly by GMS, we would work to ensure that the contractor or direct employees were performing these and other necessary services.



# SAMPLE SPECIAL EVENTS

Social events are for all residents and open to the public, and a critical component to the success of the community. Below are some examples of events currently provided at other communities that GMS has previously assisted in staffing.

## SUMMER CAMP

Each week features an array of art activities, sports, games and a field trip. Campers are provided a t-shirt, daily snacks and extended care. A similar camp can also be provided during Spring Break.

## FALL FESTIVAL

A fall celebration featuring hayrides, craft tables, carnival games, contests, bounce houses and other activities.

## WINTER CELEBRATION

A holiday celebration including pictures with Santa, trolley rides, holiday decorations, cookies, hot chocolate and coffee.

## KIDS NIGHT OUT/TEEN SCENE

DJ, games, food, drinks and more to entertain kids & teens.

## ICE CREAM SOCIAL

Ice cream and beverages with contests, raffles and games.

## SPRING FLING

An Easter egg hunt, pictures with the Easter bunny and a petting zoo. Bounce house, dunk tank, etc. can also be provided.

## DIVE-IN MOVIE

View a movie by the pool with snacks and beverages while you enjoy the show.



# SAMPLE NEWSLETTER

## AMENITY MANAGEMENT REPORT

Presented To The:

**Bartram Springs CDD**



November 2025

### Communication

- Available online amenity management reports
- 2025 Fall Festival Recap
- 2025 Halloween Party
- 2025 Christmas Party
- 2025 New Year's Eve Party
- 2025 Spring Party
- 2025 Summer Party
- 2025 Fall Festival Recap
- 2025 Halloween Party
- 2025 Christmas Party
- 2025 New Year's Eve Party
- 2025 Spring Party
- 2025 Summer Party

### Special Events

#### Upcoming Events

- 2025 Halloween Party
- 2025 Christmas Party
- 2025 New Year's Eve Party
- 2025 Spring Party
- 2025 Summer Party



### FALL FESTIVAL RECAP





### Thank you to our Sponsors!

... (text) ...



### UPCOMING EVENTS




### Bartram Springs CDD

## Santa

... (text) ...




# REFERENCES

GMS prides itself on the timely delivery of quality services to its clients. As a result, our clients as well as the other CDD industry professionals have come to recognize and appreciate the quality of the services we provide. GMS encourages its prospective clients to call our references and learn what other district supervisors, developers, attorneys, engineers, and financial professionals are saying about us. The following table contains just a few of the clients and professionals who are pleased to serve as our references:

## Glenn Roberts

Chair, Dupree Lakes CDD  
22598 Cherokee Rose Place  
Land O'Lakes, FL 34639  
(502) 741-8013  
[seat4@dupreelakescdd.org](mailto:seat4@dupreelakescdd.org)

## John Ford

Chair, Mirada CDD  
31656 Cabana Rye Avenue  
San Antonio, FL 33576  
(516) 749-2322  
[johninmirada@gmail.com](mailto:johninmirada@gmail.com)

## Kristen Brooks

Chair, Belmont CDD  
10109 Count Fleet Drive  
Ruskin, FL 33573  
(404) 723-1245  
[boardmember5@belmontcdd.com](mailto:boardmember5@belmontcdd.com)

## Gerald Barkholz

Chair, Palms of Terra Ceia Bay CDD  
2925 Terra Ceia Bay Blvd., Unit 2904  
Palmetto, FL 34221  
(941) 705-6329  
[jerrybarkholz@gmail.com](mailto:jerrybarkholz@gmail.com)

## Paul Cilia

Chair, Forest Brooke CDD  
5019 Grist Mill Court  
Wimauma, FL 33598  
(813) 419-8115  
[seat3@forestbrookecdd.org](mailto:seat3@forestbrookecdd.org)

## Mark Hardee

Chair, Terra Bella CDD  
23963 San Giovanni Drive  
Land O Lakes, FL 34639  
(301) 370-1183  
[terrabellacddseat5@gmail.com](mailto:terrabellacddseat5@gmail.com)

# GOVERNMENTAL MANAGEMENT SERVICES

Table 2-1. District Management & Client Management Experience Summary

GMS Client #	GMS Client Name As of 2026-01-05	Florida State County	General Management	Accounting & Financial Reporting	Recording Secretary	Water / Wastewater Utility	Operations Management/ Amenities
1	Aberdeen	St. Johns	✓	✓	✓		
2	Acacia Grove	Miami-Dade	✓	✓	✓		
3	Academical Village	Broward	✓	✓	✓		✓
4	Acree	Duval	✓	✓	✓		
5	Amelia Concourse	Nassau	✓	✓	✓		✓
6	Amelia Walk	Nassau	✓	✓	✓		✓
7	Anabelle Island	Clay	✓	✓	✓		✓
8	Armstrong	Clay	✓	✓	✓		
9	Astonia	Polk	✓	✓	✓		✓
10	Asturia	Pasco	✓	✓	✓		✓
11	Auburn Lakes	Brevard	✓	✓	✓		
12	Bahia Mar	Broward	✓	✓	✓		
13	Ballentrae Hillsborough	Hillsborough	✓	✓	✓		✓
14	Bannon Lakes	St. Johns	✓	✓	✓		
15	Banyan Drive Security Guard Spec	Miami-Dade	✓	✓			
16	Bartram Park	Duval	✓	✓	✓		
17	Bartram Springs	Duval	✓	✓	✓		✓
18	Bauer Drive	Miami-Dade	✓	✓	✓		
19	Bay Laurel Center	Marion	✓	✓	✓	✓	
20	Baytree	Brevard	✓	✓	✓		✓
21	Baywinds	Miami-Dade	✓	✓	✓		✓
22	Beacon Tradeport	Miami-Dade	✓	✓	✓		
23	Bella Collina	Lake	✓	✓	✓	✓	✓
24	Bella Tara	Osceola	✓	✓	✓		
25	Bellagio	Miami-Dade	✓	✓	✓		
26	Belmont	Hillsborough	✓	✓	✓		✓
27	Bent Creek	St. Lucie	✓	✓	✓		
28	Biscayne Drive Estates	Miami-Dade	✓	✓	✓		
29	Bonita Village	Lee	✓	✓	✓		
30	Bonnet Creek	Orange	✓	✓	✓		✓
31	Botaniko	Broward	✓	✓	✓		
32	Bradbury	Polk	✓	✓	✓		✓
33	Brandy Creek	St. Johns	✓	✓	✓		
34	Bridgewalk	Osceola	✓	✓	✓		✓
35	Bridgewater	Polk	✓	✓	✓		✓
36	By-The-Sea Security Guard Specia	Miami-Dade	✓	✓			
37	Campo Bello	Miami-Dade	✓	✓	✓		
38	Candler Hills East	Marion	✓	✓	✓		
39	Canopy	Leon	✓	✓	✓		✓
40	Capital Region	Leon	✓	✓	✓		
41	Central Lake	Lake	✓	✓	✓	✓	
42	Centre Lake	Miami-Dade	✓	✓	✓		✓
43	ChampionsGate	Osceola	✓	✓	✓		
44	ChampionsGate Condominium Pre	Osceola	✓	✓	✓		
45	ChampionsGate Villas Building 1 C	Osceola	✓	✓	✓		

## CLIENT LISTING



GMS Client #	GMS Client Name As of 2026-01-05	Florida State County	General Management	Accounting & Financial Reporting	Recording Secretary	Water / Wastewater Utility	Operations Management/ Amenities
46	Chapel Creek	Pasco	✓	✓	✓		✓
47	Cheswick South	Clay	✓	✓	✓		
48	City of Coral Gables**	Miami-Dade	✓	✓			
49	Coastal Ridge	Duval	✓	✓	✓		
50	Coconut Cay	Miami-Dade	✓	✓	✓		✓
51	Cocoplum Lights	Miami-Dade	✓	✓			
52	Cocoplum Security Roving Special	Miami-Dade	✓	✓			
53	Copper Creek	St. Lucie	✓	✓	✓		✓
54	Copper Oaks	Lee	✓	✓	✓		
55	Coquina Shores	Flagler	✓	✓	✓		
56	Coral Bay	Broward	✓	✓	✓		✓
57	Coral Keys Homes	Miami-Dade	✓	✓	✓		
58	Cordova Palms	St. Johns	✓	✓	✓		✓
59	Country Greens	Lake	✓	✓	✓		✓
60	County Road 33	Polk	✓	✓	✓		
61	Creekside	St. Lucie	✓	✓	✓		
62	Crossings	Osceola	✓	✓	✓		✓
63	Crossroads Village Center	Polk	✓	✓	✓		
64	Crosswinds East	Polk	✓	✓	✓		✓
65	Crosswinds West	Polk	✓	✓	✓		
66	Crystal Cay	Miami-Dade	✓	✓	✓		
67	Cypress Bluff	Duval	✓	✓	✓		
68	Cypress Cove	Broward	✓	✓	✓		✓
69	Cypress Park Estates	Polk	✓	✓	✓		✓
70	Cypress Ridge	Hillsborough	✓	✓	✓		✓
71	Darby	Duval	✓	✓	✓		✓
72	Davenport Road South	Polk	✓	✓	✓		✓
73	Davis Reserve	Polk	✓	✓	✓		✓
74	Deer Island	Lake	✓	✓	✓		✓
75	Deer Run	Flagler	✓	✓	✓		✓
76	Dewey Robbins	Lake	✓	✓	✓		
77	Double Branch	Clay	✓	✓	✓		✓
78	Dowden West	Orange	✓	✓	✓		✓
79	Downtown Doral	Miami-Dade	✓	✓	✓		
80	Downtown Doral South	Miami-Dade	✓	✓	✓		✓
81	Dunes	Flagler	✓	✓	✓		
82	Dupree Lakes	Pasco	✓	✓	✓		✓
83	Durbin Crossings	St. Johns	✓	✓	✓		
84	Eagle Hammock	Polk	✓	✓	✓		✓
85	Eagle Trace	Polk	✓	✓	✓		
86	East 547	Polk	✓	✓	✓		✓
87	Eden Hills	Polk	✓	✓	✓		✓
88	Elevation Pointe	Orange	✓	✓	✓		
89	Enclave At Black Pointe Marina	Miami-Dade	✓	✓	✓		✓
90	Epmore	Miami-Dade	✓	✓	✓		

## CLIENT LISTING



GMS Client #	GMS Client Name As of 2026-01-05	Florida State County	General Management	Accounting & Financial Reporting	Recording Secretary	Water / Wastewater Utility	Operations Management/ Amenities
91	Estancia at Wiregrass	Pasco	✓	✓	✓		✓
92	Eureka Grove	Miami-Dade	✓	✓	✓		
93	Falcon Trace	Orange	✓	✓	✓		✓
94	Forest Brooke	Hillsborough	✓	✓	✓		✓
95	Founders Ridge	Lake	✓	✓	✓		
96	Fronterra	Collier	✓	✓	✓		
97	Gardens at Hammock Beach	Flagler	✓	✓	✓		
98	GIR East	Osceola	✓	✓	✓		
99	Golden Gem	Lake	✓	✓	✓		
100	Grand Oaks	St. Johns	✓	✓	✓		✓
101	Grande Pines	Orange	✓	✓	✓		✓
102	Green Corridor	Multiple	✓	✓			
103	Griffin Lakes	Broward	✓	✓	✓		✓
104	Hamilton Bluff	Polk	✓	✓	✓		
105	Hammock Lake Banyan Dr. Security	Miami-Dade	✓	✓			
106	Hammock Lakes Security Guard Station	Miami-Dade	✓	✓			
107	Hammock Oaks Golf and RV Resort	Sumter	✓	✓	✓		✓
108	Hammock Oaks Harbor Security Guard Station	Miami-Dade	✓	✓			
109	Hammock Reserve	Polk	✓	✓	✓		✓
110	Harbor Reserve	Osceola	✓	✓	✓		✓
111	Hartford Terrace	Polk	✓	✓	✓		✓
112	Hemingway Point	Broward	✓	✓	✓		✓
113	Heritage Park	St. Johns	✓	✓	✓		✓
114	Heron Isles	Nassau	✓	✓	✓		
115	Hickory Tree	Osceola	✓	✓	✓		
116	Hicks Ditch	Lake	✓	✓	✓		
117	Hidden Creek	Hillsborough	✓	✓	✓		✓
118	Highland Meadows	Polk	✓	✓	✓		✓
119	Highland Meadows West	Polk	✓	✓	✓		✓
120	Holly Hill Road East	Polk	✓	✓	✓		✓
121	Hollywood Beach 1	Broward	✓	✓	✓		
122	Horseshoe Creek	Polk	✓	✓	✓		
123	Hunt Club Grove	Polk	✓	✓	✓		✓
124	Indigo	Volusia	✓	✓	✓		
125	Indigo East	Marion	✓	✓	✓		
126	Islands of Doral III	Miami-Dade	✓	✓	✓		
127	Isle of Bartram Park	St. Johns	✓	✓	✓		
128	Jennings Farms HOA	Clay	✓				
129	Kepler Road	Volusia	✓	✓	✓		
130	Kingman Gate	Miami-Dade	✓	✓	✓		✓
131	Kings Bay Security Guard Station	Miami-Dade	✓	✓			
132	Knightsbridge	Osceola	✓	✓	✓		✓
133	Lake Ashton	Polk	✓	✓	✓		
134	Lake Ashton II	Polk	✓	✓	✓		
135	Lake Deer	Polk	✓	✓	✓		✓

## CLIENT LISTING



GMS Client #	GMS Client Name As of 2026-01-05	Florida State County	General Management	Accounting & Financial Reporting	Recording Secretary	Water / Wastewater Utility	Operations Management/ Amenities
136	Lake Emma	Lake	✓	✓	✓		✓
137	Lake Harris	Lake	✓	✓	✓		✓
138	Lake Lizzie	Osceola	✓	✓	✓		✓
139	Lake Mattie Preserve	Polk	✓	✓	✓		
140	Lakehaven	Lake	✓	✓	✓		✓
141	Lakes by the Bay South	Miami-Dade	✓	✓	✓		✓
142	LakeShore Ranch	Pasco	✓	✓	✓		✓
143	Lakeside Plantation	Sarasota	✓	✓	✓		
144	Landings	Flagler	✓	✓	✓		
145	Landings At Miami Beach	Miami-Dade	✓	✓	✓		
146	Lawson Dunes	Polk	✓	✓	✓		✓
147	Live Oak Lake	Osceola	✓	✓	✓		✓
148	Lucaya	Lee	✓	✓	✓		
149	Lucerne Park	Polk	✓	✓	✓		✓
150	Mainstreet at Coconut Creek	Miami-Dade	✓	✓	✓		
151	Majorca Isles	Miami-Dade	✓	✓	✓		
152	Mayfair	Brevard	✓	✓	✓		
153	McJunkin At Parkland	Broward	✓	✓	✓		
154	Meadowview At Twin Creeks	St. Johns	✓	✓	✓		
155	Mediterranea	Palm Beach	✓	✓	✓		
156	Metropica	Broward	✓	✓	✓		
157	Middle Village	Clay	✓	✓	✓		
158	Mirada (Lee)	Lee	✓	✓	✓		
159	Mirada (Pasco)	Pasco	✓	✓	✓		✓
160	Narcoossee	Orange	✓	✓	✓		✓
161	Newton Road	Miami-Dade	✓	✓	✓		
162	North Boulevard	Polk	✓	✓	✓		✓
163	North Dade	Miami-Dade	✓	✓	✓		
164	North Powerline Road	Polk	✓	✓	✓		✓
165	Northern Riverwalk	Palm Beach	✓	✓	✓		
166	Oakridge	Broward	✓	✓	✓		
167	Ocean Gate	Miami-Dade	✓	✓	✓		
168	Old Cutler Bay Security Guard Spe	Miami-Dade	✓	✓			
169	Old Hickory	Osceola	✓	✓	✓		✓
170	Orchid Grove	Broward	✓	✓	✓		✓
171	Osceola Chain of Lakes	Osceola	✓	✓	✓		✓
172	OTC	Duval	✓	✓	✓		
173	Palm Coast Park	Flagler	✓	✓	✓		
174	Palm Glades	Miami-Dade	✓	✓	✓		✓
175	Palms of Terra Ceia Bay	Manatee	✓	✓	✓		
176	Park Creek	Hillsborough	✓	✓	✓		✓
177	Parkside Trails	Lake	✓	✓	✓		
178	Peace Creek	Polk	✓	✓	✓		✓
179	Peace Creek Village	Polk	✓	✓	✓		✓
180	Pine Air Lakes	Collier	✓	✓	✓		✓

## CLIENT LISTING



GMS Client #	GMS Client Name As of 2026-01-05	Florida State County	General Management	Accounting & Financial Reporting	Recording Secretary	Water / Wastewater Utility	Operations Management/ Amenities
181	Pine Bay Estates Security Roving &	Miami-Dade	✓	✓			
182	Pine Isles	Miami-Dade	✓	✓	✓		
183	Pine Ridge Plantation	Clay	✓	✓	✓		
184	Poinciana	Polk	✓	✓	✓		✓
185	Poinciana West	Polk	✓	✓	✓		✓
186	Pollard Road	Polk	✓	✓	✓		
187	Portofino Isles	St. Lucie	✓	✓	✓		
188	Portofino Landings	St. Lucie	✓	✓	✓		✓
189	Portofino Shores	St. Lucie	✓	✓	✓		✓
190	Portofino Springs	Lee	✓	✓	✓		
191	Portofino Vineyards	Lee	✓	✓	✓		
192	Portofino Vista	Osceola	✓	✓	✓		
193	Post Oak Ranch	Pasco	✓	✓	✓		
194	Preston Cove	Osceola	✓	✓	✓		✓
195	Princeton Commons	Miami-Dade	✓	✓	✓		
196	Quail Roost	Miami-Dade	✓	✓	✓		✓
197	Radiance	Flagler	✓	✓	✓		
198	Ranches at Lake McLeod	Polk	✓	✓	✓		✓
199	Rancho Grande	Miami-Dade	✓	✓	✓		
200	Randal Park	Orange	✓	✓	✓		✓
201	Randal Park POA *	Orange	✓	✓			
202	Randal Park THOA *	Orange	✓	✓			
203	Randal Walk HOA-	Orange	✓	✓			
204	Remington	Osceola	✓	✓	✓		✓
205	Renaissance	Lee	✓				
206	Reserve	St. Lucie	✓	✓	✓	✓	
207	Residences at Tohoqua Communit	Osceola	✓	✓			
208	Reunion East	Osceola	✓	✓	✓		✓
209	Reunion West	Osceola	✓	✓	✓		✓
210	Rhodine Road North	Hillsborough	✓	✓	✓		✓
211	Ridgecrest	Polk	✓	✓	✓		✓
212	Ridges at Apopka	Orange	✓	✓	✓		✓
213	Ridgewood Trails	Clay	✓	✓	✓		
214	River Place On The St. Lucie	St. Lucie	✓	✓	✓		✓
215	Riverbend	Hillsborough	✓	✓	✓		
216	Rivercrest	Hillsborough	✓	✓	✓		✓
217	Rivers Edge	St. Johns	✓	✓	✓		
218	Rivers Edge II	St. Johns	✓	✓	✓		
219	Rivers Edge III	St. Johns	✓	✓	✓		
220	Riverwalk	Orange	✓	✓	✓		✓
221	Rolling Hills	Clay	✓	✓	✓		
222	Rolling Oaks	Osceola	✓	✓	✓		✓
223	Sabal Palm	Broward	✓	✓	✓		✓
224	Saddle Creek Preserve of PC	Polk	✓	✓	✓		✓
225	Sampson Creek	St. Johns	✓	✓	✓		

## CLIENT LISTING



GMS Client #	GMS Client Name As of 2026-01-05	Florida State County	General Management	Accounting & Financial Reporting	Recording Secretary	Water / Wastewater Utility	Operations Management/ Amenities
226	San Simeon	Miami-Dade	✓	✓	✓		✓
227	Sand and Silica	Polk	✓	✓	✓		
228	Sandmine Road	Polk	✓	✓	✓		✓
229	Sawyer's Landing	Miami-Dade	✓	✓	✓		
230	Scenic Highway	Polk	✓	✓	✓		✓
231	Scenic Terrace North	Polk	✓	✓	✓		✓
232	Scenic Terrace South	Polk	✓	✓	✓		✓
233	Schaller Preserve	Polk	✓	✓	✓		
234	Seaton Creek Reserve	Duval	✓	✓	✓		✓
235	Sedona Point	Miami-Dade	✓	✓	✓		
236	Seminole Palms	Flagler	✓	✓	✓		
237	Seminole Palms of Flager*	Flagler	✓	✓			
238	Shingle Creek	Osceola	✓	✓	✓		✓
239	Shingle Creek At Bronson	Osceola	✓	✓	✓		✓
240	Shotgun Road	Broward	✓	✓	✓		
241	Siena North	Miami-Dade	✓	✓	✓		
242	Silver Palms	Miami-Dade	✓	✓	✓		
243	Six Mile Creek	Clay	✓	✓	✓		✓
244	Snapper Creek Lakes Security Gua	Miami-Dade	✓	✓			
245	Solterra	Miami-Dade	✓	✓	✓		
246	South Village	Clay	✓	✓	✓		
247	South-Dade Venture	Miami-Dade	✓	✓	✓		
248	St. Augustine Lakes	St. Johns	✓	✓	✓		
249	Stillwater	St. Johns	✓	✓	✓		
250	Stoneybrook South	Osceola	✓	✓	✓		✓
251	Stoneybrook South At CG	Osceola	✓	✓	✓		✓
252	Stoneybrook West	Orange	✓	✓	✓		✓
253	Storey Creek	Osceola	✓	✓	✓		✓
254	Storey Drive	Orange	✓	✓	✓		✓
255	Storey Park	Orange	✓	✓	✓		✓
256	Summit View	Pasco	✓	✓	✓		✓
257	Summit View II	Pasco	✓	✓	✓		
258	Sunrise Harbour Security Guard S	Miami-Dade	✓	✓			
259	Talis Park	Collier	✓	✓	✓		✓
260	Tapestry	Osceola	✓	✓	✓		✓
261	Terra Bella	Pasco	✓	✓	✓		✓
262	Tesoro	St. Lucie	✓	✓	✓		✓
263	The Crossings At Fleming Island	Clay	✓	✓	✓	✓	
264	TIFA	Brevard	✓	✓	✓		
265	Tison's Landing	Duval	✓	✓	✓		
266	Tohoqua	Osceola	✓	✓	✓		✓
267	Tohoqua Crossings Townhomes H	Osceola	✓	✓			
268	Tohoqua Master Association *	Osceola	✓	✓			
269	Tohoqua Reserve *	Osceola	✓	✓			
270	Tolomato	St. Johns	✓	✓	✓		

## CLIENT LISTING



GMS Client #	GMS Client Name As of 2026-01-05	Florida State County	General Management	Accounting & Financial Reporting	Recording Secretary	Water / Wastewater Utility	Operations Management/ Amenities
271	Towne Park	Polk	✓	✓	✓		✓
272	Townhomes at Tohoqua *	Osceola	✓	✓			
273	Tranquility	Brevard	✓	✓	✓		
274	Turnbull Creek	St. Johns	✓	✓	✓		
275	Turtle Run	Broward	✓	✓	✓		✓
276	Valencia Water Control District	Orange	✓	✓	✓		
277	Ventana	Hillsborough	✓	✓	✓		✓
278	Veranda Landing	St. Lucie	✓	✓	✓		
279	Verano #1	St. Lucie	✓	✓	✓		
280	Verano #2	St. Lucie	✓	✓	✓		✓
281	Verano #3	St. Lucie	✓	✓	✓		✓
282	Verano #4	St. Lucie	✓	✓	✓		
283	Verano #5	St. Lucie	✓	✓	✓		
284	Verano Center	St. Lucie	✓	✓	✓		
285	Viera East	Brevard	✓	✓	✓		
286	Villa Portofino East	Miami-Dade	✓	✓	✓		
287	Villa Portofino West	Miami-Dade	✓	✓	✓		
288	Villages of Biscayne Park**	Miami-Dade	✓	✓			
289	Villages of Bloomingdale	Hillsborough	✓	✓	✓		✓
290	Villamar	Polk	✓	✓	✓		✓
291	Water Tank Road	Polk	✓	✓	✓		
292	Water's Edge	Manatee	✓	✓	✓		✓
293	Waterford Estates	Charlotte	✓	✓	✓		
294	Waterleaf	Hillsborough	✓	✓	✓		
295	Waterlin Stewardship District	Osceola	✓	✓	✓		✓
296	Waterstone	St. Lucie	✓	✓	✓		✓
297	Weiberg Road	Polk	✓	✓	✓		
298	Wellness Ridge	Lake	✓	✓	✓		✓
299	Westside	Osceola	✓	✓	✓		✓
300	Westside Haines City	Polk	✓	✓	✓		
301	Westview North	Miami-Dade	✓	✓	✓		✓
302	Westwood OCC	Orange	✓	✓	✓		
303	White Clay	Polk	✓	✓	✓		
304	Wilford Preserve	Clay	✓	✓	✓		✓
305	Willow Creek	Brevard	✓	✓	✓		✓
306	Willow Creek II	Brevard	✓	✓	✓		
307	Willowbrook	Polk	✓	✓	✓		
308	Wind Meadows South	Polk	✓	✓	✓		✓
309	Windsor at Westside	Osceola	✓	✓	✓		✓
310	Windsor Cay	Lake	✓	✓	✓		✓
311	Windward	Osceola	✓	✓	✓		✓
312	Woodland Crossing	Sumter	✓	✓	✓		
313	Woodland Ranch Estates	Polk	✓	✓	✓		
314	Woodlands Section 9	Broward	✓	✓	✓		
315	Wynnfield Lakes	Duval	✓	✓	✓		

## CLIENT LISTING



GMS Client #	GMS Client Name As of 2026-01-05	Florida State County	General Management	Accounting & Financial Reporting	Recording Secretary	Water / Wastewater Utility	Operations Management/ Amenities
316	Wynnmere West	Hillsborough	✓	✓	✓		✓
317	Yarborough Lane	Polk	✓	✓	✓		
318	Zephyr Ridge	Pasco	✓	✓	✓		✓
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## CLIENT LISTING



# RISK MANAGEMENT REQUIREMENTS

**ACCORD** **CERTIFICATE OF LIABILITY INSURANCE** DATE (MM/DD/YYYY) 03/23/2026

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

**PRODUCER:** Zelen Risk Solutions, Inc. 7964 Dove Street Jacksonville FL 32220  
**CONTACT NAME:** Holly Howe  
**PHONE:** (904) 262-8080 **FAX:** (904) 262-1444  
**EMAIL:** holly@zelenrisk.com

**INSURER(S) AFFORDING COVERAGE:**  
 INSURER A: Northfield Insurance Company  
 INSURER B: Hiscox Insurance Company  
 INSURER C: RetailFirst Insurance Company

**INSURED:** Governmental Management Services-Tampa, LLC  
 1001 Bradford Way  
 Kingston TN 37763

**COVERAGES** **CERTIFICATE NUMBER:** WS700756 **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

LINE	TYPE OF INSURANCE	INSURER(S)	POLICY NUMBER	POLICY EFF. DATE	POLICY EXP. DATE	LIMITS
A	COMMERCIAL GENERAL LIABILITY CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR		WS700756	02/27/2026	02/27/2027	EACH OCCURRENCE \$1,000,000 DAMAGE TO RENTED PREMISES (EA. ACCIDENT) \$100,000 MED EXP (Acc and auto) \$5,000 PERSONAL & ADV INJURY \$1,000,000 GENERAL AGGREGATE \$2,000,000 PRODUCTS - COMP/OP AGG \$2,000,000
	GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PERIOD <input type="checkbox"/> LOC					
	OTHER:					
	AUTOMOBILE LIABILITY					COMBINED SINGLE LIMIT (EA. ACCIDENT) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
	ANY AUTO ALL OWNED AUTOS HIRE AUTOS					SCHEDULED AUTOS NON-OWNED AUTOS
	UMBRELLA LIAB EXCESS LIAB					EACH OCCURRENCE \$ AGGREGATE \$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY		0520-59463	09/01/2025	09/01/2026	E.L. EACH ACCIDENT \$1,000,000 E.L. DISEASE - EA EMPLOYEE \$1,000,000
	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/EMBER EXCLUDED? (Mandatory in NH) YES, describe under DESCRIPTION OF OPERATIONS below		0520-59463	09/01/2025	09/01/2026	E.L. DISEASE - POLICY LIMIT \$1,000,000
B	Professional		MPL4245121.25	09/05/2025	09/05/2026	Each Claim \$1,000,000 Aggregate \$2,000,000

**DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required):**  
 Certificate holder, its officers, supervisors, agents, managers, engineers and staff are additional insureds with respect to the general liability when required by written contract. Coverage is primary and non-contributory. Waiver of subrogation applies in favor of the additional insureds when required by written contract.

**CERTIFICATE HOLDER:** Suncoast CDD  
 4530 Eagle Falls Place  
 Tampa, FL 33619

**CANCELLATION:** SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  
 AUTHORIZED REPRESENTATIVE: *Vicky M. Zelen*

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**ACCORD** **CERTIFICATE OF LIABILITY INSURANCE** DATE (MM/DD/YYYY) 03/23/2026

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

**PRODUCER:** Edie Williams State Farm 330 A1A N Sulte 324 Porte Vedra, FL 32082  
**CONTACT NAME:** Stephanie Marciani  
**PHONE:** 904-425-4054 **FAX:** 904-425-4049  
**EMAIL:** Stephanie@EdieWilliams.com

**INSURER(S) AFFORDING COVERAGE:**  
 INSURER A: State Farm Mutual Automobile Insurance Company NAIC # 25178

**INSURED:** Governmental Management Services Tampa, LLC  
 1001 Bradford Way  
 Kingston, TN 37763

**COVERAGES** **CERTIFICATE NUMBER:** K09 8508-D15-59B **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

LINE	TYPE OF INSURANCE	INSURER(S)	POLICY NUMBER	POLICY EFF. DATE	POLICY EXP. DATE	LIMITS
	COMMERCIAL GENERAL LIABILITY CLAIMS-MADE <input type="checkbox"/> OCCUR					EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (EA. ACCIDENT) \$ MED EXP (Acc and auto) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMP/OP AGG \$
	GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PERIOD <input type="checkbox"/> LOC					
	OTHER:					
	AUTOMOBILE LIABILITY	X X	K09 8508-D15-59B	10/15/2025	04/15/2026	COMBINED SINGLE LIMIT (EA. ACCIDENT) \$ BODILY INJURY (Per person) \$ 1,000,000 BODILY INJURY (Per accident) \$ 1,000,000 PROPERTY DAMAGE (Per accident) \$ 1,000,000
	ANY AUTO OWNED AUTOS ONLY HIRE AUTOS ONLY					SCHEDULED AUTOS NON-OWNED AUTOS ONLY
	UMBRELLA LIAB EXCESS LIAB					EACH OCCURRENCE \$ AGGREGATE \$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY					E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/EMBER EXCLUDED? (Mandatory in NH) YES, describe under DESCRIPTION OF OPERATIONS below					

**DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required):**  
 The Suncoast Community Development District, its officers, supervisors, agents, managers, counsel, engineers, staff, and representatives is additional Insured with regard to Auto Liability.  
 The insurance is Primary and Non-Contributory with respects to claims arising out of the operation of the described vehicle.  
 Waiver of Subrogation under the Liability Coverage and Property Damage Coverage.  
 If Liability Coverage or Property Damage Liability Coverage is charged or terminated as to the interest of the Additional Insured, we will provide the Additional Insured 30 days notice of such change or termination unless another number of days notice is shown on the Declarations Page.

**CERTIFICATE HOLDER:** Suncoast Community Development District  
 4530 Eagle Falls Place  
 Tampa, FL 33619

**CANCELLATION:** SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  
 AUTHORIZED REPRESENTATIVE: *Stephanie Marciani*

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Any additional insurance requirements will be treated as reimbursable expenses and invoiced to the District on an annual basis.

# COST OF SERVICES

## MANAGEMENT SERVICES

Management services will be provided for a fixed annual fee.

*See Exhibits "A" and "B"*

Reimbursable expenses such as copies, postage, courier services, printing, and binding will be billed on a monthly basis. Management fees are invoiced at the beginning of each month and due within 30 days of the invoice date. Subsequent management fees will be established based upon the adoption of the annual operating budget, which will be adjusted to reflect ongoing levels of service.





EXHIBIT "A" – DISTRICT MANAGEMENT FEE SCHEDULE

Services Description	Fiscal Year 2026 Fees
<b>Management, Administrative, Financial and Revenue Collection, and Accounting Services</b> <ul style="list-style-type: none"> <li>Annual Fee paid in equal monthly payments (plus, reimbursable expenses)</li> <li>Our Agreement contemplates up to 12 meetings per year up to 3 hours in duration</li> </ul>	<b>\$39,000</b>
<b>Annual Assessment Administration</b> <ul style="list-style-type: none"> <li>(Beginning with the first assessment to individual unit owners, direct assessment, or utilizing tax collector)</li> </ul>	<b>\$5,000</b>
<b>Dissemination Agent Services</b> <ul style="list-style-type: none"> <li>\$5,000 Annual Fee for 1st Bond Issuance</li> <li>(\$2,500 for each additional series of Bonds)</li> </ul>	<b>\$5,000</b>
<b>Field Management Services</b> <ul style="list-style-type: none"> <li>Annual Fee paid in equal monthly payments (plus, reimbursable expenses)</li> <li>Monthly On-Site Inspections Vendor Coordination <ul style="list-style-type: none"> <li>Two (2) Visits per Month on Average</li> </ul> </li> </ul>	<b>\$15,000</b>
<b>GMS Proposal To The Suncoast Community Development District For Fiscal Year 2026</b>	<b>\$64,000</b>
<b>Amenity Management:</b> <ul style="list-style-type: none"> <li>This RFP excluded Amenity Management Services</li> <li>GMS has comprehensive Amenity Management Services; we would be happy to quote on these services if asked.</li> </ul>	<b>Available Services</b>
<b>Information Technology Fees &amp; Annual Website Maintenance:</b> <ul style="list-style-type: none"> <li>GMS will work with the District Website Vendor</li> </ul>	<b>District Vendor To Provide These Services</b>

*Partial Month Service Fees Will Be Prorated*



EXHIBIT "B" – MISCELLANEOUS FEES SCHEDULE

Item	Cost
<b>Agenda Package Hardcopy (if Applicable)</b>	<b>\$2.50 per regular Agenda Mtg.</b>
<b>Copy</b>	<b>\$0.15 / black and white page</b>
<b>Binders, Envelopes, Storage Boxes, and other Office Supplies</b>	<b>Actual Cost</b>
<b>USPS / FedEx / UPS / Conference Calls</b>	<b>Actual Cost</b>
<b>Offsite Physical Records Storage and Archival</b>	<b>\$50.00/Month</b>
<b>Extended or Extra Board Meetings</b> <ul style="list-style-type: none"> <li>Any extra meeting(s) or meeting duration exceeding a three-hour duration may be charged a meeting overage fee rounded up to the nearest full hour.</li> </ul>	<b>\$2,000/Meeting</b> <b>\$ 250/Hour</b>
<b>Additional Services Available:</b>	
<b>Other Services **</b> <ul style="list-style-type: none"> <li>New Bond Issuance Cost (per bond issue)</li> <li>Refinance Bond Issuance Cost (per bond issue)</li> <li>Debt Service Assessment Methodology Preparation</li> <li>SERC Preparation &amp; Assistance with Petition</li> <li>Prepaid Estoppel Letter - One Lot</li> <li>Prepaid Estoppel Letter - Multiple Lots</li> <li>Prepaid Estoppel Letter - Partial Payoffs</li> <li>Annual Construction Accounting Fee (while active)</li> <li>Request For Proposal Scope Preparation Documents (per RFP request - Landscaping, Irrigation, Aquatic, etc.)</li> </ul>	<b>\$ 25,000</b> <b>\$ 15,000</b> <b>\$ 20,000</b> <b>\$ 5,000</b> <b>\$ 100</b> <b>\$ 250</b> <b>\$ 500</b> <b>\$ 5,000</b> <b>\$ 3,500</b>
<b>One-Time Conversion Fee:</b> <ul style="list-style-type: none"> <li>To recreate historical Accounting and Administrative Records Needed For The Transition.</li> </ul>	<b>\$ 5,000</b>
<b>Other Requested Administrative Services As Requested By Bondholders, Dissemination Agent, District Counsel, or Boards of Supervisors</b> <ul style="list-style-type: none"> <li>District Manager</li> <li>District Accountant</li> <li>District Administration</li> <li>Field Operations Manager</li> <li>Other</li> </ul>	<b>\$ 175/Hour</b> <b>\$ 125/Hour</b> <b>\$ 80/Hour</b> <b>\$ 85/Hour</b> <b>To Be Negotiated</b>
<b>Facility Maintenance and Repair Services.</b> <ul style="list-style-type: none"> <li>GMS has a comprehensive on-site and insured maintenance service for small to medium size projects which can be provided at the direction of the District Board Of Supervisors and/or the District Manager</li> </ul>	<b>\$55.00/Hour + Expenses</b>


Miscellaneous fees are reviewed annually by GMS. An itemization of all miscellaneous fees and units consumed is included in the monthly invoice and presented to the Board of Supervisors for approval as part of the agenda packages. GMS strives to work with the District to minimize reimbursable expenses by utilizing electronic agendas and similar approaches. Any additional insurance requirements will be treated as reimbursable expenses and invoiced to the District annually.

# TO THE BOARD OF SUPERVISORS OF THE **Suncoast CDD**



SERVING  
FLORIDA'S  
COMMUNITIES



 **Address:**  
4530 Eagle Falls Place  
Tampa, FL 33619

 **Direct Phone Line:**  
(865) 603-5101

 **Darrin Mossing, GMS President:**  
[DMOSSING@GMSTNN.COM](mailto:DMOSSING@GMSTNN.COM)



## Suncoast CDD

Field Inspection Report

Thursday, April 30 2026

Prepared For Board Of Supervisors

18 Items Identified

18 Items Incomplete

John Fowler

Inframark

### Item 1

Assigned To: Fieldstone

Remove one of the dead stalks in the Paurotis palms on the entrance corner of SR 54 and Meadowbrook Drive.



### Item 2

Assigned To: Fieldstone

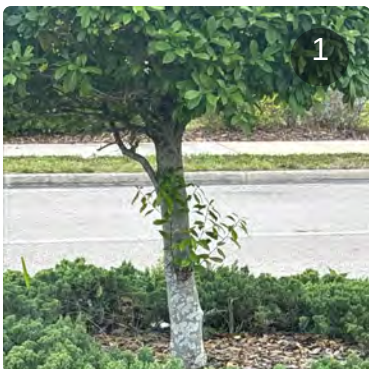
Noting bare area on entrance side of Meadowbrook Dr. at SR 54. Consider adding sod or mulch.



### Item 3

Assigned To: Fieldstone

Remove some sucker growth off trunks of the trees in the median on Meadowbrook Drive.



### Item 4

Assigned To: Fieldstone

Schedule cleaning out dead material in Liriope in the median on Meadowbrook Drive.



### Item 5

Assigned To: Fieldstone

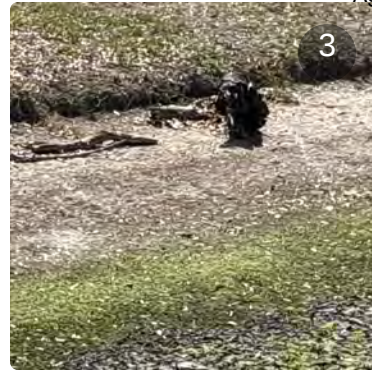
Noting this palm has been in decline over the last couple of inspections in the median island on Meadowbrook Drive. Asking Fieldstone to investigate if this might possibly need removal?



### Item 6

Assigned To: Steadfast

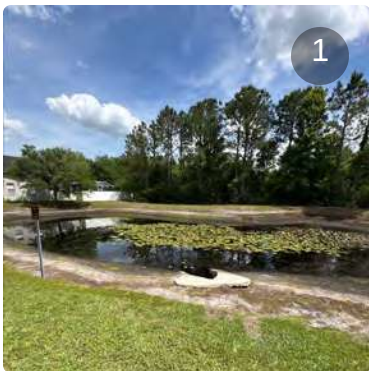
Need to remove trash and debris in pond 1 before rainy season starts.



### Item 7

Assigned To: Steadfast

Noting Waterlilies constitute approximately half of the surface area in pond 3. Consider reducing the population.



### Item 8

Assigned To: Steadfast

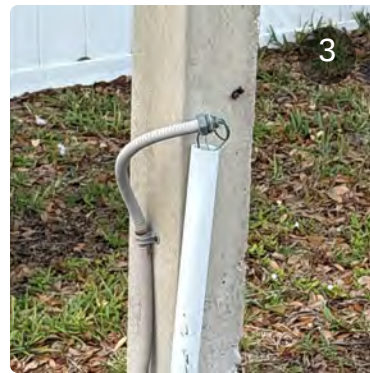
Treat submerged weeds starting to surface on pond 4. Also treat non-desirable vegetation along the pond bank.



**Item 9**

Assigned To: Maintenance

Noting exposed wires at pond 5 along Butterfly Landing Dr. ROW. I tucked them into the PVC sleeve, but need a better solution.



**Item 10**

Assigned To: Board Information

Noting how low the water table is for pond 6. Also, the Waterlily population has been reduced and looks better.



**Item 11**

Assigned To: Maintenance and Steadfast

Need to straighten a couple signs around pond 12. Also, need to treat non-desirable weeds along pond bank.



### Item 12

Assigned To: Maintenance

Need to straighten a couple signs around pond 10. Also, would recommend restoring the sign in the photo provided.



### Item 13

Assigned To: Board Information

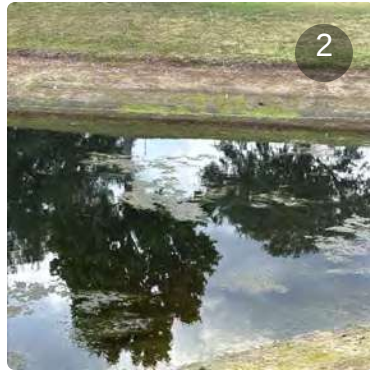
Noting bare areas at bullnoses on Autumn Sage Way. Would recommend installing river rock similar to other medians if not considering to replant here.



### Item 14

Assigned To: Steadfast

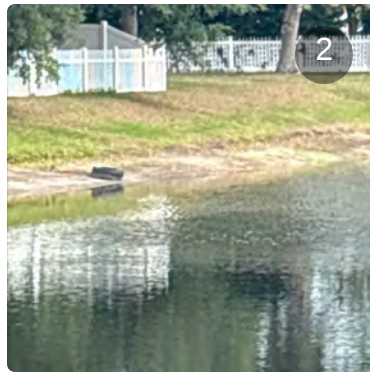
Treat submersed weeds and small algae blooms starting to show at pond 8.



**Item 15**

Assigned To: Maintenance and Steadfast

Need to straighten a sign for pond 17 as well as removing a tire on bank.



**Item 16**

Assigned To: Fieldstone

Remove dead Flax Lilies on Mentmore Blvd. South ROW located west of Prairie Iris Drive.





**Item 17**

Assigned To: Fieldstone

Raise the Oak canopy touching the pergola on Meadowbrook Drive ROW.



**Item 18**

Assigned To: Board Information

17116 Heathgate Way is the address where the dead palm fronds are laying on top of the CDD fence.

(1)



### Entrance bed

Created: Wed, 5/6/2026

Weeded and detailed. Hand pulled weeds and cleaned up Liriope. Suckers removed from trees

(2)



**Entrance- median bed**

Created: Wed, 5/6/2026

Weeded and removed trash/ debris



(3)



### **Palm At Entrance**

**Created:** Wed, 5/6/2026

Suggest to remove- fizzle top and stunted new growth



(4)



**Replanted a raked mulch-**

**Created:** Wed, 5/6/2026

Appeared a vehicle went through the bed- replants a couple of grasses that were run over and raked mulch smooth



(5)



### Viburnum Hedge

Created: Wed, 5/6/2026

All but 1 viburnum are doing well. This will be replaced by end in the month.

(6)



**Viburnum hedge and turf**

Created: Wed, 5/6/2026

Turf is doing well along Meadowbrook. Good green color



(7)



### New planting at Musky Mint

Created: Wed, 5/6/2026

New purple plants at 2 monuments are doing well



(8)



**Viburnum area**

Created: Wed, 5/6/2026

Bed is sprayed for weeds. Turf is doing well



(9)



**Entrance turf doing well and healthy**

Created: Wed, 5/6/2026



(10)



### Heathgate Bed

Created: Wed, 5/6/2026

Crew needs to trim out dead or broken limbs from juniper.



(11)



### Heathgate bed

Created: Wed, 5/6/2026

Plants are doing well. Minimal weeds present.



(12)



### Mingo drive

Created: Wed, 5/6/2026

Turf is maintained. Crew needs to keep native plantings cut back from hanging over turf

(13)



### Prairie Iris plantings

Created: Wed, 5/6/2026

New plantings are doing well. No dead plants noted.

(14)



**Trimming of large Holly is needed.**

**Created:** Wed, 5/6/2026

Crew reminded to keep taller plant at monuments trimmed

(15)



**Prairie Iris entrance.**

Created: Wed, 5/6/2026

Babies clean and trimmed



(16)



### Fenceline on Clover Blossom

Created: Wed, 5/6/2026

Crew reminded to pick up any trash and keep plants trimmed back along fenceline.



(17)



**Install stone at ends on center median**

Created: Wed, 5/6/2026

Suggest to install stone at a minimum to ends of islands that are bare dirt.



(18)



**Bellericay entrance**

**Created:** Wed, 5/6/2026

Plants are doing well and bed ia clean



(19)



**Bellericay Drive**

**Created:** Wed, 5/6/2026

Crew reminded to keep limbs and branches from hanging over sidewalks.



Proposed Tree Care Services

Tree Quantity: 168

Proposal Value: \$29,400

April 29, 2026

Proposal #: 1301582

**Tree Care Service Address/Location**

Suncoast CDD - hardwood trimming  
 17611 Mentmore Blvd  
 Land O Lakes, FL 34638

**Tree Care Service Billing Address**

Fieldstone Landscape Services -Elizabeth  
 4801 122nd Avenue North  
 Clearwater, FL 33762  
 Elizabeth Moore  
 Emoore@fieldstonels.com

**Fieldstone Tree Care**

4801 122nd Avenue North  
 Clearwater, Florida 33762  
 Devon Santiago  
 dsantiago@fieldstonels.com  
 tel:8136383357

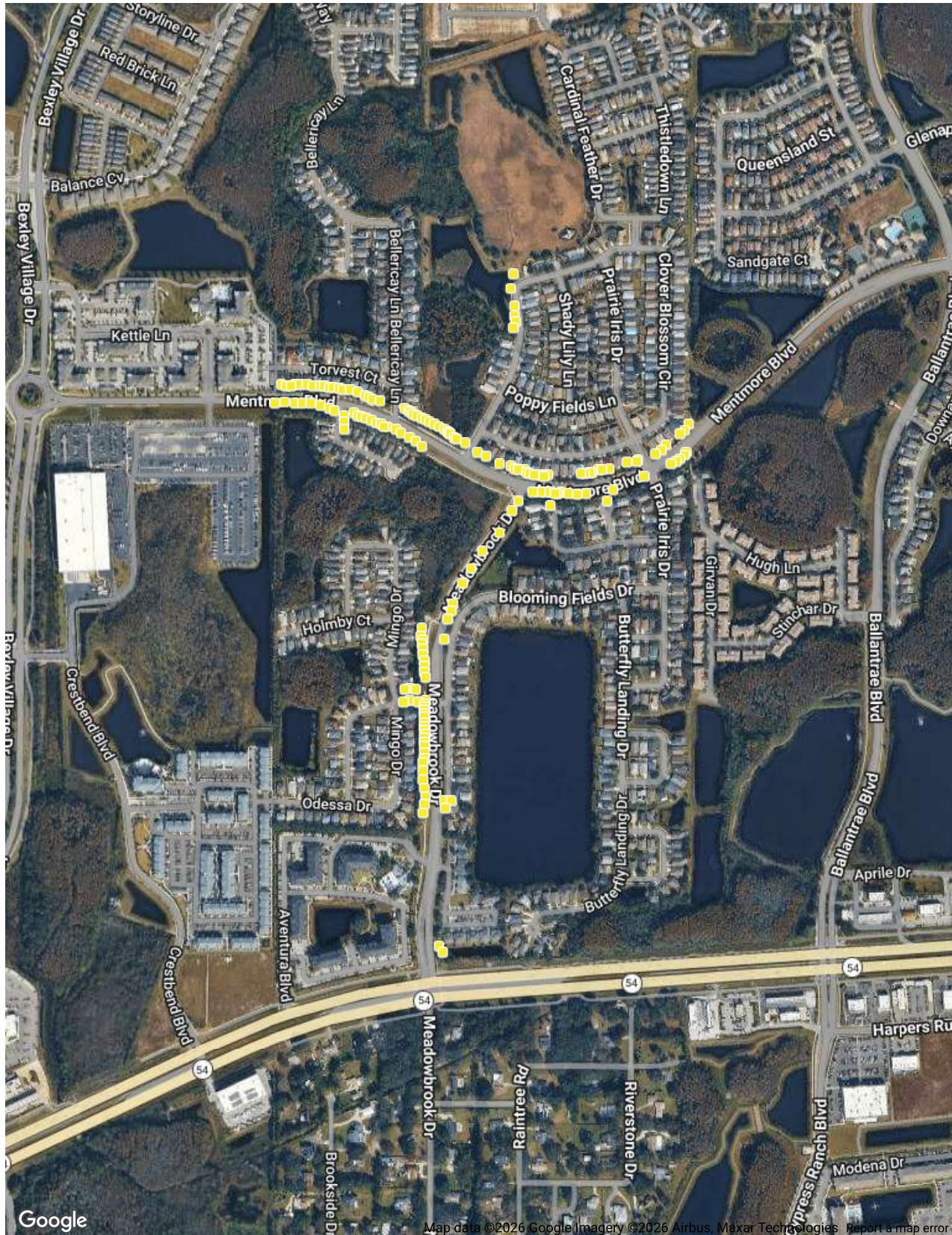
	Species	Qty	Height	DBH	Service	Price
	Southern Live Oak	168	31'-45'	19"-24"	Dead wood removal - branches over 2 DBH / Canopy Raise / 15ft Roadway Clearance / 10ft Pedestrian Clearance	-
					<b>Total</b>	<b>\$29,400</b>

**Additional Information**

FLS will service all hardwoods on the inventory count. Shrubs aren't included, landscape bushes, fall under the landscaper's scopem unless the customer requests an additional bid. Branches growing over neighboring properties, not included. Specs: 5-10ft Building Clearance, 10ft Pedestrian Clearance, 15ft Roadway Clearance, Dead wood removal - branches over 2 DBH, Canopy Raise 360. Hauling away all debris.



Suncoast CDD - hardwood trimming



Legend (168)  
Southern Live Oa... (168)

Google

Map data ©2026 Google Imagery ©2026 Airbus, Maxar Technologies. Report a map error

# Terms and Conditions for Tree Care Services

**1. Performance by Company:**

Work crews shall arrive at the job site unannounced unless otherwise noted herein. The Company shall attempt to meet all performance dates, but shall not be liable for damages due to delays from inclement weather or other causes beyond our control.

**2. Workmanship:**

All work will be performed in a professional manner by experienced personnel outfitted with the appropriate tools and equipment to complete the job properly. Unless otherwise indicated herein, The Company will remove wood, brush and debris incidental to the work.

**3. Insurance:**

The Company is insured for liability resulting from injury to persons or property, and all its employees are covered by Workers Compensation Insurance.

**4. Ownership:**

The customer warrants that all trees, plant material and property upon which work is to be performed are either owned by him/her or that permission for the work has been obtained from the owner.

The Company is to be held harmless from all claims for damages resulting from the customer's failure to obtain such permission.

**5. Limitations:**

The customer must identify all non- public utilities. The Company assumes no responsibility for the location of or damage to underground utilities not clearly marked by the customer prior to commencement of site services. Stump grinding and removals as proposed will occur where public utilities allow.

**6. Terms of Payment:**

All accounts are net payable upon receipt of invoice. A service charge of 1.5% will be added to accounts not fully paid 30 days subsequent to the invoice date. If outside assistance is used to collect the account, the customer is responsible for all costs associated with the collection, including, but not limited to, attorney fees and court costs.

## Customer

April 29, 2026

Signature

Date

April 29, 2026

Printed Name

Date

## Tree Care Service Provider

*Devon Santiago*

April 29, 2026

Signature

Date

Devon Santiago

April 29, 2026

Printed Name

Date

**FIELDSTONE**

**LANDSCAPE**

**QUOTATION**

Date: May 05, 2026  
Proposal #: 22949

**Mailing Address**

Inframark  
2654 Cypress Ridge Blvd  
Suite 101  
Wesley Chapel, FL 33544

**Job Address**

Suncoast CDD  
16615 Crosspointe Run  
Land O' Lakes, FL 34638

Home Phone:

Business Phone: 813.873.7300

---

**Job Summary:**

Prarie Iris entrance bed- Adding in plants to fill in bare areas:

All plants selected are drought tolerant and frost

3 - 3 gal Aspidistra (Mother -In-In Law Tongue) at south end of momument

12 -Bomelaid - 6 each side

18 - Society Garlic - 1 gal

6 - Yellow or Red Lantana - 1 gal.

10 -Purple Queen ( 5 each side) - 1 gal.

Rake back existing stone before planting

Install plants as shown on the design

Rack back stone to cover roots and finish bed

Clean up and dispose of all debris



**Quote Total: \$1,292.59**

## Terms & Conditions

### **Acceptance of Work**

- **Fieldstone Landscape Services, LLC (Contractor)** and **Suncoast CDD (Client)** agree to services, conditions, materials, and total dollar amount.
- Contractor will commence the Work at the agreed time and place, and continue such Work diligently and without delay, in a good and workmanlike manner, and in strict conformity with the specifications and requirements contained herein and in any related Order.

### **Payment Terms and Conditions**

- The client is subject to a Progress Billing & Payment Schedule based on the total size of the proposed project. Payment Schedule may include up to a 50% Deposit to schedule work.
- Client agrees to pay the balance before the due date on final invoice to avoid 1.5% penalty for late payment.

### **Procedure for Extra Work and Changes**

- If it shall become necessary for the Contractor to make changes in any designs, drawings, plans, reports, or specifications for any part of the project or reasons over which Contractor has no control, or are put to any extra work, cost or expense by reason of any act or matter over which it has no control, the Client will pay to the Contractor a fee for such changed or extra Work calculated on a time and materials basis.
- All changes to Work or pricing or the terms of this Agreement will be read and understood within the context and meanings of this Agreement unless stated explicitly to the contrary.
- Extras to the Contract are payable by the Client forthwith upon receipt of the Contractor's invoice.

### **Warranty and Tolerances**

- **Payments Received:** The Warranty for the contract is only valid if payment is received in full on acceptance of the work.
- **Diligence:** the Contractor agrees to carry out its Work diligently and to provide sufficient supervision and inspection of its staff and subcontractors and that it's work will be of proper and professional quality, and in full conformity with the requirements of the contract.
- **Site Unknowns:** It is the responsibility of the Client or the Client's Representative to fully inform the Contractor of all the information regarding site unknowns that may include difficult buried materials, cables, and pipes, tree stumps, drainage or water table issues, rock, and shale sub-surfaces and/or other impediments, issues or factors that could otherwise impact the quality, cost, and timeliness of project completion. Failure to notify the Contractor may lead to additional costs to the Client (at the Contractor's discretion) and schedule time not included in the Quotation and may require changes in design and construction to overcome such problems – all for which the Client will be responsible.
- **Underground Utilities:** Should damage occur to utilities during construction, the Contractor is only liable for the cost of the repair. the Contractor is not liable in any way for inconvenience to the Client caused by damage to the utilities. Damage to neighbor's utilities on the Client's property is the responsibility of the Client.

### **Material Tolerances**

- **Landscape:** Contractor warrants the installation, workmanship, and material. Material is guaranteed to be true to name and maintain a healthy condition except for normal shock of installation.
  - **Hardwood & Palm Trees:** (6) Months
  - **Plants/Shrubs/Ornamentals/Groundcover:** (3) Months
  - **Sod:** (30) Days
  - **Seasonal Annual Flowers:** (30) Days
- **Irrigation/Drainage/Lighting:** Contractor warrants the installation, workmanship, design, and





LANDSCAPE

QUOTATION

Date: May 05, 2026  
Proposal #: 22950

**Mailing Address**

Inframark  
2654 Cypress Ridge Blvd  
Suite 101  
Wesley Chapel, FL 33544

**Job Address**

Suncoast CDD  
16615 Crosspointe Run  
Land O' Lakes, FL 34638

Home Phone:

Business Phone: 813.873.7300

**Job Summary:**

Installation of screening hedge for the new well equipment:

Install hedge approx 3-4' distance from equipmrrnt so that there is still access when needed

Create a mulch bed around new well and install plants.

Install 11 - plants



**Quote Total: \$1,266.24**

## Terms & Conditions

### **Acceptance of Work**

- **Fieldstone Landscape Services, LLC (Contractor)** and **Suncoast CDD (Client)** agree to services, conditions, materials, and total dollar amount.
- Contractor will commence the Work at the agreed time and place, and continue such Work diligently and without delay, in a good and workmanlike manner, and in strict conformity with the specifications and requirements contained herein and in any related Order.

### **Payment Terms and Conditions**

- The client is subject to a Progress Billing & Payment Schedule based on the total size of the proposed project. Payment Schedule may include up to a 50% Deposit to schedule work.
- Client agrees to pay the balance before the due date on final invoice to avoid 1.5% penalty for late payment.

### **Procedure for Extra Work and Changes**

- If it shall become necessary for the Contractor to make changes in any designs, drawings, plans, reports, or specifications for any part of the project or reasons over which Contractor has no control, or are put to any extra work, cost or expense by reason of any act or matter over which it has no control, the Client will pay to the Contractor a fee for such changed or extra Work calculated on a time and materials basis.
- All changes to Work or pricing or the terms of this Agreement will be read and understood within the context and meanings of this Agreement unless stated explicitly to the contrary.
- Extras to the Contract are payable by the Client forthwith upon receipt of the Contractor's invoice.

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- **Payments Received:** The Warranty for the contract is only valid if payment is received in full on acceptance of the work.
- **Diligence:** the Contractor agrees to carry out its Work diligently and to provide sufficient supervision and inspection of its staff and subcontractors and that it's work will be of proper and professional quality, and in full conformity with the requirements of the contract.
- **Site Unknowns:** It is the responsibility of the Client or the Client's Representative to fully inform the Contractor of all the information regarding site unknowns that may include difficult buried materials, cables, and pipes, tree stumps, drainage or water table issues, rock, and shale sub-surfaces and/or other impediments, issues or factors that could otherwise impact the quality, cost, and timeliness of project completion. Failure to notify the Contractor may lead to additional costs to the Client (at the Contractor's discretion) and schedule time not included in the Quotation and may require changes in design and construction to overcome such problems – all for which the Client will be responsible.
- **Underground Utilities:** Should damage occur to utilities during construction, the Contractor is only liable for the cost of the repair. the Contractor is not liable in any way for inconvenience to the Client caused by damage to the utilities. Damage to neighbor's utilities on the Client's property is the responsibility of the Client.

### **Material Tolerances**

- **Landscape:** Contractor warrants the installation, workmanship, and material. Material is guaranteed to be true to name and maintain a healthy condition except for normal shock of installation.
  - **Hardwood & Palm Trees:** (6) Months
  - **Plants/Shrubs/Ornamentals/Groundcover:** (3) Months
  - **Sod:** (30) Days
  - **Seasonal Annual Flowers:** (30) Days
- **Irrigation/Drainage/Lighting:** Contractor warrants the installation, workmanship, design, and

materials employed in connection with the underground irrigation system for six (6) months following installation completion.

- Stone: Natural stone has color variations that vary from stone to stone. In addition, mineral deposits such as lime, iron, etc. can change the stone and even bleed. This is the nature of the product, and the Client accepts this as a natural and acceptable quality of the stone.
- The warranty is not valid on relocated material, annuals and any existing irrigation, drainage, and lighting systems. Warranty is not valid on new plant material or sod installed without automatic irrigation. Warranty does not cover damage from pests or disease encountered on site, act of God, or damaged caused by others. Failure of water or power source not caused by Contractor will void warranty.

**Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_  
**Inframark**

We wanted to share with you our new customer portal. This will allow you to manage your account online by having access to: viewing proposals and being able to electronically sign for new proposed work, viewing and submitting issues, as well as viewing and electronically paying your invoices.

To register, please use the following link: [Fieldstone.PropertyServicePortal.com](http://Fieldstone.PropertyServicePortal.com)

Thank you so much and we look forward to assisting you with this great new feature we're able to offer. If you have any issues, please contact [accountsreceivable@fieldstonels.com](mailto:accountsreceivable@fieldstonels.com)



# FIELDSTONE

powered by SmartLink Network®

## April 2026

Date: Apr 22, 2026 7:35 am  
 Inspector: Mario Martinez

Site	
Name	Suncoast CDD
Address	16615 Crosspointe Run
City	Land O' Lakes
ST	Florida
Zip	34638

Controller	
Name	Controller 1 by 54 road
Location	
Model	
Modules	4
Controller ID	196260

Water Days as of Apr 22, 2026	
Program A	Mon , Wed , Fri
Program B	
Program C	
Program D	

Notes
No repairs needed

	Location	Valve Status	Clogged Nozzle	Blocked Head	Broken Head	Raise Head	Lo <sup>o</sup> er Head	Broken Drip Micro Spray	Broken Lateral	Broken Main	Scope
1	D micro spray monument	Pass									
2	S entrance island exit	Pass									
3	S island	Pass									
4		Pass									
5	S island entrance exit	Pass									
6	Bubbler	Pass									
7		Pass									
8		Pass									



# FIELDSTONE

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## April 2026

Date: Apr 22, 2026 10:38 am  
 Inspector: Mario Martinez

Site	
Name	Suncoast CDD
Address	16615 Crosspointe Run
City	Land O' Lakes
ST	Florida
Zip	34638

Controller	
Name	Controller 2 prairie back monument
Location	
Model	
Modules	2
Controller ID	221388

Water Days as of Apr 22, 2026	
Program A	Sun , Tue , Fri
Program B	
Program C	
Program D	

Notes
No repairs needed

	Location	Valve Status	Clogged Nozzle	Blocked Head	Broken Head	Raise Head	Lower Head	Broken Drip Micro Spray	Broken Lateral	Broken Main	Scope
1	Sprays monument	Pass									
2	Sprays island & monuments	Pass									
3	Sprays entrance and exit	Pass									
4	Bubbler	Pass									



# FIELDSTONE

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## April 2026

Date: Apr 22, 2026 9:56 am  
 Inspector: Mario Martinez

Site	
Name	Suncoast CDD
Address	16615 Crosspointe Run
City	Land O' Lakes
ST	Florida
Zip	34638

Controller	
Name	Heathgate Bay / Meadowbrook
Location	
Model	
Modules	5
Controller ID	210617

Water Days as of Apr 22, 2026	
Program A	
Program B	
Program C	
Program D	

Notes
No repairs needed

	Location	Valve Status	Clogged Nozzle	Blocked Head	Broken Head	Raise Head	Lower Head	Broken Drip Micro Spray	Broken Lateral	Broken Main	Scope
1	Bubbler	Pass									
2	Spray by entrance	Pass									
3	Spray entrance	Pass									
4	Spray	Pass									
5	Spray by road	Pass									
6	Rotor by meadowbrook	Pass									
7	Spray by exit side	Pass									
8	Rotor be exit side	Pass									
9	Spray along side walk	Pass									
10	Sprays along side walk	Pass									



# FIELDSTONE

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## April 2026

Date: Apr 22, 2026 10:25 am  
 Inspector: Mario Martinez

Site	
Name	Suncoast CDD
Address	16615 Crosspointe Run
City	Land O' Lakes
ST	Florida
Zip	34638

Controller	
Name	Controller 1 3024 prairie
Location	
Model	
Modules	2
Controller ID	196310

Water Days as of Apr 22, 2026	
Program A	Mon , Wed , Fri
Program B	
Program C	
Program D	

Notes
Repairs completed

	Location	Valve Status	Clogged Nozzle	Blocked Head	Broken Head	Raise Head	Lower Head	Broken Drip Micro Spray	Broken Lateral	Broken Main	Scope
1	S exit side	Pass									
2	Drip entry side	Pass									
3	S island	Pass									
4	S entry & island	Pass									

**Zone #4 - 04-22-26 10:35 am CDT**



**Zone #4 - 04-22-26 10:36 am CDT**





# FIELDSTONE

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## April 2026

Date: Apr 22, 2026 8:01 am  
 Inspector: Mario Martinez

Site	
Name	Suncoast CDD
Address	16615 Crosspointe Run
City	Land O' Lakes
ST	Florida
Zip	34638

Controller	
Name	Controller 2
Location	
Model	
Modules	5
Controller ID	196262

Water Days as of Apr 22, 2026	
Program A	Mon , Wed , Fri
Program B	Sun , Tue , Thur , Sat
Program C	
Program D	

Notes
Repairs complete

	Location	Valve Status	Clogged Nozzle	Blocked Head	Broken Head	Raise Head	Loer Head	Broken Drip Micro Spray	Broken Lateral	Broken Main	Scope
1	S meadow brook dr	Pass									
2	S meadow brook dr	Pass									
3	S meadow brook Dr by sidewalk	Pass									
4	S by musky mint	Pass			1						
Replace 2 regular nozzle, 2 MPR for coverage											
5	S meadow brook Dr	Pass									
6	S meadow brook Dr	Pass									
We need further investigation here Because the lateral line seems to be clogged and all the sprays have not popped											
7	S by pergola	Pass			1				1		
Broken head and or lateral break											
8	S by mentmore blvd	Pass									
9	D musky mint dr	Pass									
10	BOC BY ZONE 2	Pass									

**Zone #4 - 04-22-26 8:20 am CDT**



**Zone #6 - 04-22-26 8:37 am CDT**



**Zone #7 - 04-22-26 8:41 am CDT**





# FIELDSTONE

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## April 2026

Date: Apr 22, 2026 10:52 am  
 Inspector: Mario Martinez

Site	
Name	Suncoast CDD
Address	16615 Crosspointe Run
City	Land O' Lakes
ST	Florida
Zip	34638

Controller	
Name	Controller 5 clover blossom
Location	
Model	
Modules	2
Controller ID	196332

Water Days as of Apr 22, 2026	
Program A	Mon , Wed , Fri
Program B	
Program C	
Program D	

Notes
Repairs completed

	Location	Valve Status	Clogged Nozzle	Blocked Head	Broken Head	Raise Head	Loer Head	Broken Drip Micro Spray	Broken Lateral	Broken Main	Scope
1		Pass									
2	Sprays both sides street	Pass									
3	Bubbler	Pass									
4	Sprays entrance and exit side	Pass			1						
12" head broken											
5	No wire connected	Pass									





# FIELDSTONE

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## April 2026

Date: Apr 22, 2026 11:50 am  
 Inspector: Mario Martinez

Site	
Name	Suncoast CDD
Address	16615 Crosspointe Run
City	Land O' Lakes
ST	Florida
Zip	34638

Controller	
Name	Controller 7 Ongar ct
Location	
Model	
Modules	2
Controller ID	196323

Water Days as of Apr 22, 2026	
Program A	Tue , Thur , Sat
Program B	
Program C	
Program D	

Notes
No repairs needed

	Location	Valve Status	Clogged Nozzle	Blocked Head	Broken Head	Raise Head	Lower Head	Broken Drip Micro Spray	Broken Lateral	Broken Main	Scope
1	S exit side	Pass									
2	Bubbler	Pass									
3		Pass									
4	S both sides	Pass									
5		Pass									



# FIELDSTONE

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## April 2026

Date: Apr 22, 2026 12:06 pm  
 Inspector: Mario Martinez

Site	
Name	Suncoast CDD
Address	16615 Crosspointe Run
City	Land O' Lakes
ST	Florida
Zip	34638

Controller	
Name	By pond at ongar
Location	
Model	
Modules	3
Controller ID	221445

Water Days as of Apr 22, 2026	
Program A	Tue , Thur , Sat
Program B	
Program C	
Program D	

Notes
Repairs completed

	Location	Valve Status	Clogged Nozzle	Blocked Head	Broken Head	Raise Head	Lower Head	Broken Drip Micro Spray	Broken Lateral	Broken Main	Scope
1	R by timer	Pass									
2	R by side walk	Pass			2						
Don't rotate 1 rotor, 1 is broken											
3	R by road	Pass									
4		Pass									
5		Pass									
6		Pass									

**Zone #2 - 04-22-26 12:14 pm CDT**



**Zone #2 - 04-22-26 12:15 pm CDT**





# FIELDSTONE

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## April 2026

Date: Apr 22, 2026 12:20 pm  
 Inspector: Mario Martinez

Site	
Name	Suncoast CDD
Address	16615 Crosspointe Run
City	Land O' Lakes
ST	Florida
Zip	34638

Controller	
Name	Controller 6 bellericay In
Location	
Model	
Modules	2
Controller ID	196329

Water Days as of Apr 22, 2026	
Program A	
Program B	
Program C	
Program D	

Notes
No repairs needed

	Location	Valve Status	Clogged Nozzle	Blocked Head	Broken Head	Raise Head	Lower Head	Broken Drip Micro Spray	Broken Lateral	Broken Main	Scope
1	S entrance & exit	Pass									
2	Bubbler	Pass									
3	Sprays	Pass									
4	Sprays both sides	Pass									



# FIELDSTONE

powered by SmartLink Network®

## April 2026

Date: Apr 22, 2026 2:47 pm  
 Inspector: Mario Martinez

Site	
Name	Suncoast CDD
Address	16615 Crosspointe Run
City	Land O' Lakes
ST	Florida
Zip	34638

Controller	
Name	Controller 10 by dog park
Location	
Model	
Modules	5
Controller ID	221465

Water Days as of Apr 22, 2026	
Program A	Mon , Wed , Fri
Program B	
Program C	
Program D	

Notes
Repairs completed

	Location	Valve Status	Clogged Nozzle	Blocked Head	Broken Head	Raise Head	Looper Head	Broken Drip Micro Spray	Broken Lateral	Broken Main	Scope
1	Sprays mentmore blvd	Pass			4						
2	Old abandoned drip zone	Pass									
3	Sprays blvd mentmore	Pass			2						
4	Old abandoned drip	Pass									
5	Old abandoned drip zone	Pass									
6	Sprays mentmore blvd	Pass			1						
7	Bubbler dog park	Pass									
8	Abandoned bubbler zone	Pass									
9	MPR by pond	Pass									
10	Bubbler pond	Pass									
11		Pass									

**Zone #1 - 04-22-26 2:49 pm CDT**



**Zone #1 - 04-22-26 2:49 pm CDT**



**Zone #1 - 04-22-26 2:49 pm CDT**



**Zone #1 - 04-22-26 2:50 pm CDT**



**Zone #3 - 04-22-26 2:54 pm CDT**



**Zone #6 - 04-22-26 2:57 pm CDT**



# 2025 Form 1 Instructions

## Statement of Financial Interests

### Notice

The annual Statement of Financial Interests is due July 1. If the annual form is not submitted via the electronic filing system created and maintained by the Commission by September 1, an automatic fine of \$25 for each day late will be imposed, up to a maximum penalty of \$1,500. Failure to file also can result in removal from public office or employment. [s. 112.3145, F.S.]

In addition, failure to make any required disclosure constitutes grounds for and may be punished by one or more of the following: disqualification from being on the ballot, impeachment, removal or suspension from office or employment, demotion, reduction in salary, reprimand, or a civil penalty not exceeding \$20,000. [s. 112.317, F.S.]

### Instructions for Completing and Filing Form 1 Statement of Financial Interests

**WHEN TO FILE:** *Initially*, each local officer/employee, state officer, and specified state employee must file **within 30 days** of the date of his or her appointment or of the beginning of employment. Appointees who must be confirmed by the Senate must file prior to confirmation, even if that is less than 30 days from the date of their appointment.

**Candidates** must file at the same time they file their qualifying papers.

**Thereafter**, file by July 1 following each calendar year in which they hold their positions.

**Finally**, file a final disclosure form (Form 1F) within 60 days of leaving office or employment. Filing a CE Form 1F (Final Statement of Financial Interests) does not relieve the filer of filing a CE Form 1 if the filer was in his or her position on December 31, 2025.

#### **WHO MUST FILE FORM 1:**

1. Elected public officials not serving in a political subdivision of the state and any person appointed to fill a vacancy in such office, unless required to file full disclosure on Form 6.
2. Appointed members of each board, commission, authority, or council having statewide jurisdiction, excluding those required to file full disclosure on Form 6 as well as members of solely advisory bodies, but including judicial nominating commission members; Directors of Enterprise Florida, Scripps Florida Funding Corporation, and Career Source Florida; and members of the Council on the Social Status of Black Men and Boys; the Executive Director, Governors, and senior managers of Citizens Property Insurance Corporation; Governors and senior managers of Florida Workers' Compensation Joint Underwriting Association; board members of the Northeast Fla. Regional Transportation Commission; board members of Triumph Gulf Coast, Inc; board members of Florida Is For Veterans, Inc.; and members of the Technology Advisory Council within the Agency for State Technology.
3. The Commissioner of Education, members of the State Board of Education, the Board of Governors, the local Boards of Trustees and Presidents of state universities, and the Florida Prepaid College Board.
4. Persons elected to office in any political subdivision (such as municipalities, counties, and special districts) and any person appointed to fill a vacancy in such office, unless required to file Form 6.
5. Appointed members of the following boards, councils, commissions, authorities, or other bodies of county, municipality, school district, independent special district, or other political subdivision: the governing body of the subdivision; community college or junior college district boards of trustees; boards having the power to enforce local code provisions; boards of adjustment; community redevelopment agencies; planning or zoning boards having the power to recommend, create, or modify land planning or zoning within a political subdivision, except for citizen advisory committees, technical coordinating committees, and similar groups who only have the power to make recommendations to planning or zoning boards, and except for representatives of a military installation acting on behalf of all military installations within that jurisdiction; pension or retirement boards empowered to invest pension or retirement funds or determine entitlement to or amount of pensions or other retirement benefits, and the Pinellas County Construction Licensing Board.
6. Any appointed member of a local government board who is required to file a statement of financial interests by the appointing authority or the enabling legislation, ordinance, or resolution creating the board.

7. Persons holding any of these positions in local government: county or city manager; chief administrative employee or finance director of a county, municipality, or other political subdivision; county or municipal attorney; chief county or municipal building inspector; county or municipal water resources coordinator; county or municipal pollution control director; county or municipal environmental control director; county or municipal administrator with power to grant or deny a land development permit; chief of police; fire chief; municipal clerk; appointed district school superintendent; community college president; district medical examiner; purchasing agent (regardless of title) having the authority to make any purchase exceeding \$35,000 for the local governmental unit.
8. Officers and employees of entities serving as chief administrative officer of a political subdivision.
9. Members of governing boards of charter schools operated by a city or other public entity.
10. Employees in the office of the Governor or of a Cabinet member who are exempt from the Career Service System, excluding secretarial, clerical, and similar positions.
11. The following positions in each state department, commission, board, or council: Secretary, Assistant or Deputy Secretary, Executive Director, Assistant or Deputy Executive Director, and anyone having the power normally conferred upon such persons, regardless of title.
12. The following positions in each state department or division: Director, Assistant or Deputy Director, Bureau Chief, and any person having the power normally conferred upon such persons, regardless of title.
13. Assistant State Attorneys, Assistant Public Defenders, criminal conflict and civil regional counsel, and assistant criminal conflict and civil regional counsel, Public Counsel, full-time state employees serving as counsel or assistant counsel to a state agency, administrative law judges, and hearing officers.
14. The Superintendent or Director of a state mental health institute established for training and research in the mental health field, or any major state institution or facility established for corrections, training, treatment, or rehabilitation.
15. State agency Business Managers, Finance and Accounting Directors, Personnel Officers, Grant Coordinators, and purchasing agents (regardless of title) with power to make a purchase exceeding \$35,000.
16. The following positions in legislative branch agencies: each employee (other than those employed in maintenance, clerical, secretarial, or similar positions

and legislative assistants exempted by the presiding officer of their house);  
and each employee of the Commission on Ethics.

17. Each member of the governing body of a "large-hub commercial service airport," as defined in Section 112.3144(1)(c), Florida Statutes, except for members required to comply with the financial disclosure requirements of s. 8, Article II of the State Constitution.

**ATTACHMENTS:** A filer may include and submit attachments or other supporting documentation when filing disclosure.

**PUBLIC RECORD:** The disclosure form is a public record and is required by law to be posted to the Commission's website. Your Social Security number, bank account, debit, charge, and credit card numbers, mortgage or brokerage account numbers, personal identification numbers, or taxpayer identification numbers are not required and should not be included. If such information is included in the filing, it may be made available for public inspection and copying unless redaction is required by the filer, without any liability to the Commission. If you are an active or former officer or employee listed in Section 119.071, F.S., whose home address or other information is exempt from disclosure, the Commission will maintain that confidentiality *if you submit a written and notarized request.*

**QUESTIONS** about this form or the ethics laws may be addressed to the Commission on Ethics, Post Office Drawer 15709, Tallahassee, Florida 32317-5709; physical address: 325 John Knox Road, Building E, Suite 200, Tallahassee, FL 32303; telephone (850) 488-7864.

## Instructions for Completing Form 1

### Primary Sources of Income

[112.3145(3)(b)1, F.S]

This section is intended to require the disclosure of your principal sources of income during the disclosure period. You do not have to disclose any public salary or public position(s). The income of your spouse need not be disclosed; however, if there is joint income to you and your spouse from property you own jointly (such

as interest or dividends from a bank account or stocks), you should disclose the source of that income if it exceeded the threshold.

Please list in this part of the form the name, address, and principal business activity of each source of your income which exceeded \$2,500 of gross income received by you in your own name or by any other person for your use or benefit.

"Gross income" means the same as it does for income tax purposes, even if the income is not actually taxable, such as interest on tax-free bonds. Examples include: compensation for services, income from business, gains from property dealings, interest, rents, dividends, pensions, IRA distributions, social security, distributive share of partnership gross income, and alimony if considered gross income under federal law, but not child support.

If disclosure of a primary source of income will place you in violation of confidentiality or privilege pursuant to law or rules governing attorneys, you may write "Legal Client" in each of the disclosure fields without providing any further information.

Examples:

- If you were employed by a company that manufactures computers and received more than \$2,500, list the name of the company, its address, and its principal business activity (computer manufacturing).
- If you were a partner in a law firm and your distributive share of partnership gross income exceeded \$2,500, list the name of the firm, its address, and its principal business activity (practice of law).
- If you were the sole proprietor of a retail gift business and your gross income from the business exceeded \$2,500, list the name of the business, its address, and its principal business activity (retail gift sales).
- If you received income from investments in stocks and bonds, list each individual company from which you derived more than \$2,500. Do not aggregate all of your investment income.
- If more than \$2,500 of your gross income was gain from the sale of property (not just the selling price), list as a source of income the purchaser's name, address and principal business activity. If the purchaser's identity is unknown, such as where securities listed on an exchange are sold through a brokerage firm, the source of income should be listed as "sale of (name of company) stock," for example.
- If more than \$2,500 of your gross income was in the form of interest from one particular financial institution (aggregating interest from all CD's, accounts,

etc., at that institution), list the name of the institution, its address, and its principal business activity.

## Secondary Sources of Income

[Required by s. 112.3145(3)(b)2, F.S.]

This part is intended to require the disclosure of major customers, clients, and other sources of income to businesses in which you own an interest. It is not for reporting income from second jobs. That kind of income should be reported in "Primary Sources of Income," if it meets the reporting threshold. You will not have anything to report unless, during the disclosure period:

1. You owned (either directly or indirectly in the form of an equitable or beneficial interest) more than 5% of the total assets or capital stock of a business entity (a corporation, partnership, LLC, limited partnership, proprietorship, joint venture, trust, firm, etc., doing business in Florida); **and,**
2. You received more than \$5,000 of your gross income during the disclosure period from that business entity.

If your interests and gross income exceeded these thresholds, then for that business entity you must list every source of income to the business entity which exceeded 10% of the business entity's gross income (computed on the basis of the business entity's most recently completed fiscal year), the source's address, and the source's principal business activity.

If disclosure of a secondary source of income will place you in violation of confidentiality or privilege pursuant to law or rules governing attorneys, you should disclose the name of the business entity for which your ownership and gross income exceeded the two thresholds above, and then write "Legal Client" in the remaining disclosure fields without providing any further information.

Examples:

- You are the sole proprietor of a dry cleaning business, from which you received more than \$5,000. If only one customer, a uniform rental company, provided more than 10% of your dry cleaning business, you must list the name

of the uniform rental company, its address, and its principal business activity (uniform rentals).

- You are a 20% partner in a partnership that owns a shopping mall and your partnership income exceeded the above thresholds. List each tenant of the mall that provided more than 10% of the partnership's gross income and the tenant's address and principal business activity.

## Real Property

[Required by s. 112.3145(3)(b)3, F.S.]

In this part, list the location or description of all real property in Florida in which you owned directly or indirectly at any time during the disclosure period in excess of 5% of the property's value. You are not required to list your residences. You should list any vacation homes if you derive income from them.

Indirect ownership includes situations where you are a beneficiary of a trust that owns the property, as well as situations where you own more than 5% of a partnership or corporation that owns the property. The value of the property may be determined by its market value for ad valorem tax purposes, in the absence of a more accurate fair market value.

The location or description of the property should be sufficient to enable anyone who looks at the form to identify the property. A street address should be used, if one exists.

## Intangible Personal Property

[Required by s. 112.3145(3)(b)3, F.S.]

Describe any intangible personal property that, at any time during the disclosure period, was worth more than \$10,000 and state the business entity to which the property related. Intangible personal property includes things such as cash on hand, stocks, bonds, certificates of deposit, vehicle leases, interests in businesses, beneficial interests in trusts, money owed you (including, but not limited to, loans made as a candidate to your own campaign), Deferred Retirement Option Program (DROP) accounts, the Florida Prepaid College Plan, and bank accounts in which you have an ownership interest. Intangible personal property also includes

investment products held in IRAs, brokerage accounts, and the Florida College Investment Plan. Note that the product contained in a brokerage account, IRA, or the Florida College Investment Plan is your asset—not the account or plan itself. Things like automobiles and houses you own, jewelry, and paintings are not intangible property. Intangibles relating to the same business entity may be aggregated; for example, CDs and savings accounts with the same bank. Property owned as tenants by the entirety or as joint tenants with right of survivorship, including bank accounts owned in such a manner, should be valued at 100%. The value of a leased vehicle is the vehicle's present value minus the lease residual (a number found on the lease document).

## Liabilities

[Required by s. 112.3145(3)(b)4, F.S.]

List the name and address of each creditor to whom you owed more than \$10,000 at any time during the disclosure period. The amount of the liability of a vehicle lease is the sum of any past-due payments and all unpaid prospective lease payments. You are not required to list the amount of any debt. You do not have to disclose credit card and retail installment accounts, taxes owed (unless reduced to a judgment), indebtedness on a life insurance policy owed to the company of issuance, or contingent liabilities. A "contingent liability" is one that will become an actual liability only when one or more future events occur or fail to occur, such as where you are liable only as a guarantor, surety, or endorser on a promissory note. If you are a "co-maker" and are jointly liable or jointly and severally liable, then it is not a contingent liability.

## Interests in Specified Businesses

[Required by s. 112.3145(7), F.S.]

The types of businesses covered in this disclosure include: state and federally chartered banks; state and federal savings and loan associations; cemetery companies; insurance companies; mortgage companies; credit unions; small loan companies; alcoholic beverage licensees; pari-mutuel wagering companies, utility companies, entities controlled by the Public Service Commission; and entities granted a franchise to operate by either a city or a county government.

Disclose in this part the fact that you owned during the disclosure period an interest in, or held any of certain positions with the types of businesses listed above. You must make this disclosure if you own or owned (either directly or indirectly in the form of an equitable or beneficial interest) at any time during the disclosure period more than 5% of the total assets or capital stock of one of the types of business entities listed above. You also must complete this part of the form for each of these types of businesses for which you are, or were at any time during the disclosure period, an officer, director, partner, proprietor, or agent (other than a resident agent solely for service of process).

If you have or held such a position or ownership interest in one of these types of businesses, list the name of the business, its address and principal business activity, and the position held with the business (if any). If you own(ed) more than a 5% interest in the business, indicate that fact and describe the nature of your interest.

## **Training Certification**

[Required by s. 112.3142, F.S.]

If you are a Constitutional or elected municipal officer, appointed school superintendent, a commissioner of a community redevelopment agency created under Part III, Chapter 163, or an elected local officer of an independent special district, including any person appointed to fill a vacancy on an elected independent special district board, whose service began on or before March 31 of the year for which you are filing, you are required to complete four hours of ethics training which addresses Article II, Section 8 of the Florida Constitution, the Code of Ethics for Public Officers and Employees, and the public records and open meetings laws of the state. You are required to certify on this form that you have taken such training.

CE FORM 1 - Effective: January 1, 2026

Incorporated by reference in Rules 34-8.001 and 34-8.202, F.A.C





**Brian E. Corley**  
**Supervisor of Elections**  
PO Box 300  
Dade City FL 33526-0300

**1-800-851-8754**  
**[www.PascoVotes.gov](http://www.PascoVotes.gov)**

April 17, 2026

Kareen Baker  
District Administrative Assistant  
Inframark  
11555 Heron Bay Blvd Suite 201  
Coral Springs FL 33076

Dear Kareen Baker:

Pursuant to your request, the following voter registration statistics are provided for their respective community development districts as of April 15, 2026.

- Lake Bernadette Community Development District 1,389
- Suncoast Community Development District 1,415

As always, please call me if you have any questions or need additional information.

Sincerely,

Tiffannie A. Alligood  
Chief Administrative Officer



Steadfast Alliance  
 Suite 102  
 San Antonio FL 33576 US

# ESTIMATE

**DATE**                      **DUE**    **ESTIMATE #**  
 5/5/2026                      6/4/2026    EST-SCA3968

**BILL TO**

Suncoast Community  
 Development Distriict  
 c/o Inframark  
 2645 Cypress Ridge Blvd, Ste  
 101  
 Wesley Chapel FL 33544

**SHIP TO**

Meadowbrook Dr  
 Lutz FL 33558

DESCRIPTION	QTY	RATE	AMOUNT
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Fountain rebuild for Suncoast CDD.

Scope of work to include the following:  
 - Replacement of 2hp motor and starter box with Vertex components.

Fountain will be disconnected from power, removed from the water, and kept offsite until repairs are complete. After which it will be placed back in the water, reconnected, and set to run at the desired times.	1.00	3,250.00	3,250.00
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Estimated timeframe to completion: 2-4 weeks

Light kit rebuild for Suncoast CDD.

Scope of work to include:  
 - Replacement of three 43W lights with Vertex components.

Replacement to be done concurrently with fountain repair if approved.	1.00	4,050.00	4,050.00
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I HEREBY CERTIFY that I am the Client/Owner of record of the property which is the subject of this proposal and hereby authorize the performance of the services as described herein and agree to pay the charges resulting thereby as identified above.

**TOTAL**                                      **7,300.00**

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

Accepted this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

Signature: \_\_\_\_\_

Printed Name and Title: \_\_\_\_\_

Representing (Name of Firm): \_\_\_\_\_

# Quote

## Total Pressure Power-Wash & Seal

11420 Amapola Bloom CT.  
 Riverview, FL 33579  
 1-727-295-8592  
[totalpressurepowerwashandseal@gmail.com](mailto:totalpressurepowerwashandseal@gmail.com)



Date: 4/23/2026  
 Agenda Page 228

To: Alba Sanchez

Attention:  
 Suncoast CDD

Address:  
 2503 Butterfly Landing Drive

	Job Title	Payment Terms	
	Commercial Pressure Washing	Half Now Other Half Once Done	

Item	Description	Amount
Pressure Washing	ALL sidewalks & monument curbing on Meadowbrook and Mentmore Road will be pressure washed using our High Output 8GPM Commercial Grade Machines. During the cleaning process we will apply our detergents to effectively remove mold & algae helping bring the concrete to its natural color.	\$5,900
Fence	The fence running along the SW corner of Mentmore will be cleaned using our Soft-Wash System. This will ensure the integrity of the fence is not compromised.	\$450
Disclosure	Our equipment will guarantee no streak marks are left on the sidewalks once cleaned. These marks are left from inferior equipment, cleaning too quickly, and or not applying proper cleaning agents.	
Tax	Pasco County	Exempt

Grand Total: \$6,350  
 Deposit Due: \$3,175  
 Balance Due At Completion: \$3,175

**Kings Power Washing Services**  
 1735 Rumar Ln  
 Holiday, FL 34691 USA  
 info@kingspowerwasher.com  
 kingspowerwasher.com

# Estimate 10260



<b>ADDRESS</b> Suncoast CDD C/o Inframark 2005 Pan am Circle Tampa, FL 33607	DATE 04/25/2026	TOTAL \$11,835.00	
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DATE	ACTIVITY	DESCRIPTION	QTY	RATE	AMOUNT
	<b>Community sidewalks</b>	Sidewalks along Meadowbrook Dr and Mentmore Rd will be cleaned.  Sidewalks will be pre-treated with a 1% sodium hypochlorite and surfactant solution, surface cleaned, and post treated with a 1% sodium hypochlorite and surfactant solution. This pre-and post treatment eliminates the lines that are left after surface cleaning.	1	5,750.00	5,750.00
	<b>Gutter curbing</b>	All curbing along either side of Meadowbrook Dr and Mentmore Rd will be cleaned.  Curbing will be pre-treated with a 1% sodium hypochlorite and surfactant solution, surface cleaned, and post treated with a 1% sodium hypochlorite and surfactant solution.	1	4,450.00	4,450.00
	<b>Entrance monuments</b>	All organic growth will be removed off of the entrance monuments along Meadowbrook Dr and Mentmore Rd. This includes rust stains.	11	120.00	1,320.00

DATE	ACTIVITY	DESCRIPTION	QTY	RATE	AMOUNT
	<b>Fence cleaning</b>	Fencing on the south-west corner of Mentmore rd will be cleaned. This is adjacent to Ongar Court. (Highlighted in red)  The method of cleaning will be a 5% mixture of sodium hypochlorite and surfactant sprayed on the fence to remove all organic materials. Clean water will then be used to rinse the fence of all chemical solution.	1	315.00	315.00

Checks are the preferred method of payment, but a bank transfer is adequate. Checks can be sent to 1735 Rumar Ln Holiday, FL 34691

-Kings will provide water via renting a fire hydrant meter.

-Our main goal is to provide a quality service where the residents, board, and our property manager are happy and satisfied with the end result. Please reach out for any comments/concerns that are before, during, or after completion.

<b>SUBTOTAL</b>	11,835.00
<b>TAX</b>	0.00

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<b>TOTAL</b>	<b>\$11,835.00</b>
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**THANK YOU.**

Accepted By

Accepted Date





The enclosed proposal is presented by  
**Riptide Pressure Washing, LLC**

Website: [www.riptidepressurewashing.com](http://www.riptidepressurewashing.com)

Email: [office@riptidepressurewashing.com](mailto:office@riptidepressurewashing.com)

Phone: 727-216-9672

<b>WHAT YOU GET WITH RIPTIDE:</b>		
RIPTIDE SUPPLIES ALL OF THE WATER.	✓	Page 2
RIPTIDE HAS INDUSTRIAL EQUIPMENT FOR EFFICIENCY AND EFFECTIVENESS.	✓	Page 2
RIPTIDE USES HOT WATER FOR BEST RESULTS WHEN CLEANING CONCRETE.	✓	Page 2
RIPTIDE APPLIES AN ALGICIDE TO CONCRETE TO IMPROVE THE LONGEVITY OF THE CLEANING.	✓	Page 2
RIPTIDE CARRIES WORKERS COMPENSATION INSURANCE.	✓	Page 3
RIPTIDE CARRIES COMMERCIAL AUTO AND GENERAL LIABILITY WITH \$2M IN PROTECTION.	✓	Page 3
RIPTIDE IS A PRE-APPROVED VENDOR.	✓	Page 3

This proposal contains proprietary information intended solely for the individual or entity to whom it is addressed and may not be shared or posted publicly without permission.

### **OUR EQUIPMENT:**

Riptide's industrial equipment consists of three, turbo diesel 84HP, 20 gallon-per-minute pressure washing machines, connected to instant hot-water heaters. These machines are mounted on a 25' x 10' trailer with a 2,000-gallon water tank and a county issued hydrant filtration system for extracting water from hydrant meters with authorization from the county. Additionally, a custom, compressed-air atomizing pump is mounted to our rig to apply the appropriate amount of cleaning agent to clean a structure, roof, or building of any size.

### **OUR CLEANING METHOD FOR ROOFS, BUILDINGS AND OTHER STRUCTURES:**

Riptide performs roof cleaning, exterior building cleaning, fence cleaning and boundary wall cleaning using our state-of-the-art cleaning agent application system. A proprietary blend of cleaning agents, with the active ingredient SLO-MO, are mixed in our chemical tank and applied to the structure by our team of professionals. Once applied, the cleaning agents break down the living organisms that create the unsightly discoloration on exterior structures. The end result is restored aesthetic value; and the elimination of contaminants such as mold, mildew and algae. Our cleaning agents are approved by the Vinyl Siding Institute and the Roof Cleaning Institute of America. Photo, right: Roof cleaning being performed on a 3-story apt. building in Tampa.



**PRO TIP:** Never allow a vendor to use a pressure washer or a concrete cleaner on a roof.

### **OUR CLEANING METHOD FOR CONCRETE:**

We use a 2-step process to clean concrete surfaces such as sidewalks, walkways, curbing, etc. Step one is performed using a flat surface cleaner. The flat surface cleaner affords a powerful, uniform cleaning without risk of damage to concrete material. This cleaning tool, when combined with the use of hot water to create steam, provides the most effective cleaning method for flat surfaces. After the concrete is cleaned, we apply an algicide which oxidizes the algae, mold and mildew from the porous concrete and inhibits its return. The end result is bright, clean concrete material. Photo, right: High-performance, industrial flat surface cleaner



Please note that Riptide also offers a concrete treatment to remove rust and iron stains that are the result of well water irrigation systems. This is a separate service using a different cleaning method (a chemical application) and must be specifically requested.

**HOW WE DETERMINE OUR PRICING:**

All cost proposals are calculated using linear or square footage of the area to be cleaned. This allows us to determine the amount of algicide we will need for the scope of work. A detailed itemized cost proposal is included on the last page of this proposal. **This proposal is being submitted as one complete document, do not separate the itemized cost proposal when presenting to decision-makers.**

**HOW WE PROTECT YOUR ASSETS:**

Riptide carries Worker's Compensation, General Liability and Commercial Auto insurance with levels of coverage well beyond the minimums. A certificate of insurance is included on the last page of this proposal. **Your property will be named as an additional insured upon acceptance of our cost proposal.** Riptide Pressure Washing, LLC is an approved vendor with credentialing companies such as Compliance Depot, Enterprise Risk Control, Grid Vendor, VIVE and Registry Monitoring Services.

**HOW YOU WILL BENEFIT FROM CHOOSING RIPTIDE PRESSURE WASHING, LLC:**

Riptide is the best-equipped exterior cleaning specialist in the entire state of Florida. The efficiency of our industrial equipment reduces the time needed to complete a project, thereby reducing disruption to residents and commerce. Simply put, other vendors would need a full week to perform the same amount of services that Riptide performs in one day. Working efficiently means that we can offer very competitive pricing. When compared “apples to apples” with other vendors, we are almost always the least expensive vendor, offering you the best service. Be sure to compare wisely.

**PRO TIP:** When comparing vendors, use the checklist on our cover page to be certain you are asking all of the right questions.



Suncoast Meadows CDD

Walk 1  
669.91 ft

Walk 2  
416.94 ft

Walk 8  
76.95 ft

Walk 4  
292.16 ft

1 - SW Mentmore Fence - BLVD FACING SIDE  
96.17 ft

2 - SW Mentmore Fence - BLVD FACING SIDE  
507.1 ft

Walk 7  
1,214.5 ft

Walk 3  
996.14 ft

8 ft Wide

Walk 5  
210.84 ft

7 FT Wide

Walk 6  
718.06 ft

7 FT WIDE  
6.89 ft

6 FT WIDE  
5.92 ft

Walk 13  
1,288.38 ft

Walk 9  
1,281.87 ft

RIPTIDE PRESSURE WASHING, LLC

RIPTIDEROOFCLEANING.COM

Walk 14  
738.77 ft

Walk 10  
714 ft

RIPTIDEPRESSUREWASHING.COM

Walk 15  
117.58 ft

Walk 11  
161.97 ft

Walk 16  
654.27 ft

Walk 12  
592.92 ft

Monument - Median Curb  
1,055.57 ft



**Cost proposal for:**

**Riptide Pressure Washing, LLC**

Suncoast CDD  
 Mentmore Blvd  
 Land O Lakes, FL 34638

<p><b>Property Manager:</b>                  Alba Sanchez</p>
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Item	Description	Quan.	Cost	Total
	Map is included on page 4.			
Sidewalks	Cleaning of sidewalks labeled 1-4.	2,373	0.85	2,017.05
Sidewalks	Cleaning of sidewalks labeled 5-8.	2,218	0.75	1,663.50
Sidewalks	Cleaning of sidewalks labeled 9-12.	2,748	0.65	1,786.20
Sidewalks	Cleaning of sidewalks labeled 13-16.	2,797	0.75	2,097.75
Monument	Cleaning the monument and the surrounding median curbing highlighted in light blue.	1,055	0.40	422.00
Fence	Cleaning of the fence highlighted in green.	603	1.00	603.00
	<p>PLEASE NOTE THE FOLLOWING:</p> <p>1) Riptide supplies the water, see page 2.</p> <p>2) Service includes the application of algicide to remove and deter mold, mildew and algae.</p> <p>3) Please view our cleaning demonstration videos at <a href="http://www.riptidepressurewashing.com">www.riptidepressurewashing.com</a></p> <p>4) Riptide carries FULL WORKERS COMPENSATION (NOT AN EXEMPTION), general liability, 5-million dollar umbrella policy, and commercial auto insurance for your protection.</p>			

<p><b>Proposal total =</b></p>	<p><b>\$8,589.50</b></p>
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\_\_\_\_\_  
 \*Signature and date of approval.



# Request for Taxpayer Identification Number and Certification

Go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9) for instructions and the latest information.

**Give form to the  
requester. Do not  
send to the IRS.**

**Before you begin.** For guidance related to the purpose of Form W-9, see *Purpose of Form*, below.

<b>Print or type.</b>  <b>See Specific Instructions on page 3.</b>	<b>1</b>	Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.)		
	<b>2</b>	Business name/disregarded entity name, if different from above.		
	<b>3a</b>	Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only <b>one</b> of the following seven boxes.  <input type="checkbox"/> Individual/sole proprietor <input type="checkbox"/> C corporation <input type="checkbox"/> S corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate  <input type="checkbox"/> LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership) _____ <b>Note:</b> Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner.  <input type="checkbox"/> Other (see instructions) _____	<b>4</b> Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):  Exempt payee code (if any) _____  Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any) _____  <i>(Applies to accounts maintained outside the United States.)</i>	
	<b>3b</b>	If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as its tax classification, and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check this box if you have any foreign partners, owners, or beneficiaries. See instructions _____ <input type="checkbox"/>		
	<b>5</b>	Address (number, street, and apt. or suite no.). See instructions.	Requester's name and address (optional)	
	<b>6</b>	City, state, and ZIP code		
	<b>7</b>	List account number(s) here (optional)		

## Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

<b>Social security number</b>									
				-					
<b>or</b>									
<b>Employer identification number</b>									

**Note:** If the account is in more than one name, see the instructions for line 1. See also *What Name and Number To Give the Requester* for guidelines on whose number to enter.

## Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and, generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

**Sign Here**    Signature of U.S. person    *Robert C. Byrnes*

Date **January 3, 2025**

## General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

**Future developments.** For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9).

## What's New

Line 3a has been modified to clarify how a disregarded entity completes this line. An LLC that is a disregarded entity should check the appropriate box for the tax classification of its owner. Otherwise, it should check the "LLC" box and enter its appropriate tax classification.

New line 3b has been added to this form. A flow-through entity is required to complete this line to indicate that it has direct or indirect foreign partners, owners, or beneficiaries when it provides the Form W-9 to another flow-through entity in which it has an ownership interest. This change is intended to provide a flow-through entity with information regarding the status of its indirect foreign partners, owners, or beneficiaries, so that it can satisfy any applicable reporting requirements. For example, a partnership that has any indirect foreign partners may be required to complete Schedules K-2 and K-3. See the Partnership Instructions for Schedules K-2 and K-3 (Form 1065).

## Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS is giving you this form because they

**Jayman Enterprises, LLC**

1020 HILL FLOWER DR  
 Brooksville, FL 34604

Phone # (813)333-3008      jaymanenterprises@live.com

**Estimate**

Date	Estimate #
4/28/2026	1372

Name / Address
Suncoast CDD C/O Inframark 2654 Cypress Ridge Blvd. Suite 101 Wesley Chapel, Fl. 33544

			Project
Description	Qty	Rate	Total
Pressure wash each community Monument along Mentmore and Meadowbrook Dr using a Chemical compound mixture of Sodium Chlorite and surface cleaner. This helps kill all organic growth allowing for a deep penetrating clean and low pressure rinse. Rust stains will also be treated.	10	150.00	1,500.00
Pressure wash main entrance monument using a Chemical compound mixture of Sodium Chlorite and surface cleaner. This helps kill all organic growth allowing for a deep penetrating clean and low pressure rinse.	1	575.00	575.00
Pressure wash sidewalks along Meadowbrook and Mentmore within property lines . Sidewalks will be pretreated prior to surface cleaning, rinsed of all organic materials and then post treated. Pretreatment and posttreatment will be a mixture of Sodium Chlorite and Surface cleaning solution. This allows the algae and organic life to be killed and helps keep it from growing back so rapidly in the Harsh Florida Environment		7,200.00	7,200.00
Pressure wash curbing along Meadowbrook and Mentmore within property lines . Curbing will be pretreated prior to surface cleaning, rinsed of all organic materials and then post treated. Pretreatment and posttreatment will be a mixture of Sodium Chlorite and Surface cleaning solution. This allows the algae and organic life to be killed and helps keep it from growing back so rapidly in the Harsh Florida Environment		5,225.00	5,225.00
Pressure wash exterior Fence. A mall portion of the fence on the Southwest corner of Mentmore and Ongar will be pre-treated and cleaned. This will be No Cost.		0.00	0.00
Client Signature		<b>Total</b>	\$14,500.00



Subtotal: \$8,400.00

Total: \$8,400.00

\_\_\_\_\_  
Customer signature\_\_\_\_\_  
Date

Unless stated otherwise above, payments are due in accordance with the standard terms and conditions of this Contract.

If any unforeseen problems should be discovered by the Company during the performance of the Services, the Company shall provide the Client with notice of said problems as soon as reasonably possible and identify the nature of such problem and any additional cost that may be incurred. Unless otherwise specified, rock removal, dewatering, cover up, and haul off are not included in the Contract Price. The Company shall not be responsible for all damage to unmarked underground lines. Any changes requested by the Client are not covered by this Contract, and must be add subsequently, at the cost agreed upon by both parties. All labor and materials provided under this scope of work are warranted for a period of **one (1) year from the date of completion**. This warranty covers defects in workmanship and installation. Any defective work identified within the warranty period will be repaired or replaced at no additional cost.

#### ITEMS TO BE PROVIDED BY THE CLIENT

Provide Access to Premises

Any Permit Modification, if Applicable

THE STANDARD TERMS AND CONDITIONS on the pages following this Contract are agreed to be a part of this Contract.

#### STANDARD TERMS AND CONDITIONS

**Definitions.** As used herein, the following terms shall have the following meanings:

- "*Applicable Law*" is defined as those laws, rules, regulations, codes, administrative, judicial and settlement orders, directives, guidelines, judgments, rulings, interpretations, permit conditions and restrictions or similar requirements or actions of any federal, state, local government, agency or executive or administrative body of any of the foregoing in each case that pertain to the (a) parties' respective responsibilities under this Contract, (b) the performance of the Services hereunder, and (c) health and welfare of individuals related to the Services and this Contract.
- "*Change of Law*" the occurrence of any of the events listed in (i) through (iv) below, which results or can reasonably be expected to result in a direct increase to the Company's cost of providing the Services:

- (i) there is passed or promulgated any federal, state, or other local law, statute, ordinance, rule or regulation different from those existing on the date of the Contract; or
- (ii) there is passed or promulgated any amendment to, or change in, any federal, state, or other local law, statute, ordinance, rule or regulation (including any applicable sales tax regulation) following the date of the Contract; or
- (iii) there comes into existence an order or judgment of any federal, state, or local court, administrative agency or other governmental body following the date of the Contract containing interpretations of law relating to the provision of the Services by the Company that is inconsistent with generally accepted interpretations in effect on the date of the Contract; or
- (iv) (a) the imposition of any condition different from those existing on the date of the Contract on the issuance or renewal of any official permit, license or necessary approval related to the provision of the Services by the Company, or (b) there shall be a suspension, termination, interruption, revocation, denial or failure of renewal of any official permit, license or necessary approval related to the provision of the Services by the Company, including without limitation such of the foregoing as are issued or approved by the USEPA, the Occupational Safety and Health Administration or any local Environmental and/or Building Department;

- *"Client"* means the party or parties identified as such in this Contract. In addition, the term *"Client"* specifically includes the party or parties to whom the Company provides Services and the party or parties responsible for paying the Company for Services provided pursuant to this Contract;

- *"Contract"* means these terms and conditions, any additional terms and conditions attached hereto and/or expressly incorporated herein directly or by reference including, without limitation, the Company's proposal to perform the Services to the extent such proposal is referenced or attached herein;

- *"Contract Price"* means the compensation to be paid by the Client to the Company in accordance with the terms of this Contract;

- *"Company"* means Inframark, LLC and its permissible successors and/or assigns. Any reference to actions taken or not taken by the Company shall include those actions taken or not taken on Company's behalf;

- *"Force Majeure"* means any act, event or condition to the extent that it adversely affects the cost or the ability of a party to perform its obligations in accordance with the terms of this Contract if such act, event or condition, in light of any circumstances that should have been known or reasonably believed to have existed at the time, is beyond the reasonable control and is not a result of the willful or negligent act, error or omission or failure to exercise reasonable diligence on the part of the party so affected. Force Majeure includes but is not limited to: (a) acts of God; (b) flood, fire, earthquake, hurricane or explosion; (c) war, invasion, hostilities (whether war is declared or not), terrorist threats or acts, riot or other civil unrest; (d) government order or law; (e) actions, embargoes or blockades in effect on or after the date of this Contract; (f) action by any governmental authority; (g) national or regional emergency; (h) strikes, labor stoppages or slowdowns or other industrial disturbances, other than those involving the affected parties employees; (i) shortage of adequate power or transportation facilities.

· *"Services"* means the services to be provided by the Company to the Client as identified in this Contract;

**Disclosure of Information and Cooperation of the Parties.** (a) The Client represents and warrants that it will furnish the Company with all items, if any, described in this Contract in a diligent and timely manner; (b) The Client further represents and warrants that it has disclosed, and it will continue to disclose, any and all information it now has, or may have in the future, to the extent that such information is relevant to the Company in performing its duties and obligations hereunder; (c) Each party hereto agrees that it will cooperate in good faith with the other and its agents, employees, representatives, officers, contractors and subcontractors to facilitate the performance of the mutual obligations set forth in this Contract.

**Employee Safety.** Company shall be responsible for the safety, efficiency and adequacy of its employees and any vehicles and/or machinery, equipment or materials furnished or utilized by the Company during the performance of Services. Company, however, shall not assume any obligation or incur any liability for personal injury or property damage caused by (i) unsafe site conditions not created by the Company or by any of its agents, employees and subcontractors, (ii) work being performed by other parties not related to the Company, (iii) the negligence or misconduct of the Client, and/or (iv) the negligence or misconduct of any third party not related to the Company.

**Permits.** Client shall be responsible for obtaining, maintaining and renewing, in Client's name and expense, all state, federal and local permits and licenses required for the Services.

**Quality of Work and Materials.** The Services to be provided hereunder shall be performed by qualified personnel in accordance with standards generally acceptable in Company's industry. Company shall use the effort, skill, diligence and quality control/quality assurance measures expected of a qualified firm performing services of a similar nature to the Services to be performed by the Company pursuant to this Contract. Materials furnished by the Company, if any, shall be current, of merchantable quality and in compliance with any technical standards or specifications incorporated into this Contract. When certain materials are specified by a reference standard, Company may select any suitable commercially acceptable material meeting the standard. The Company makes no representations or warranties as to the merchantable quality and in compliance with any technical standards or specifications of materials provided by third parties. COMPANY SHALL NOT BE RESPONSIBLE TO THE CLIENT FOR ANY GUARANTEES OR WARRANTIES OFFERED BY OTHERS IN CONNECTION WITH ANY EQUIPMENT, MATERIALS, AND SUPPLIES PROVIDED FOR THE SERVICES HEREUNDER. COMPANY MAKES NO WARRANTIES, EXPRESS OR IMPLIED, INCLUDING WARRANTIES OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE, WARRANTIES REGARDING ANY EQUIPMENT, MATERIALS, AND SUPPLIES, IF ANY, OR ANY WARRANTIES THAT MIGHT ARISE FROM COURSE OF DEALING OR USAGE OF TRADE.

**Ownership of Documents and Inventions.** (a) All tracing, specifications, computations, notes and other original documents as instruments of service shall, following the full payment of the Contract Price, become the property of the Client, provided however that the Company shall be entitled to keep copies of same; (b) All inventions, discoveries and copyright in work of authorship, including those in formative stages, made by the Company (either alone or jointly with the Client) shall from the time of conception or, in the case of works of authorship, from the time of creation be the property of Company.

**Approval of Work.** Services performed by Company shall be deemed approved and accepted by Client within a reasonable period (but in no event longer than thirty (30) days) after the Client has had the opportunity to review and/or inspect such services unless Client objects within such period by written notice specifically stating the details in which Client believes such services are incomplete or defective. Under all circumstances, final payment of the Contract Price shall be deemed as conclusive evidence that the Client has accepted all Services provided.

**Compliance with Law.** All parties shall comply with all Applicable Law in performing their respective obligations hereunder.

**Contract Schedule.** The date of completion provided in this Contract, if any, is approximate and is based upon prompt receipt by Company of all necessary information and data required to be supplied by the Client, and is subject to weather, groundwater conditions and unforeseen site conditions. Company will use all reasonable efforts to meet the stipulated completion date and completion of the Services within a reasonable time shall constitute the Company's full compliance with this Contract.

**Default and Termination.** Default and Termination. Either party may terminate this Contract by immediate written notice if the other has failed to comply with a material term, provided that the non-defaulting party has first given the defaulting party written notice to cure their default within forty-five (45) days ("Cure Period") and the defaulting party has not done so. If a default cannot be cured within the Cure Period days, the parties may agree an extension as long as the defaulting party provides evidence within the Cure Period that it has commenced a cure and is pursuing it diligently. In the event of any termination, Company shall be paid for all services rendered and materials supplied (including materials specifically manufactured/made for the Client that have yet to be supplied), if any, through the date of termination. For purposes of this section, the failure of the Client to pay Company in accordance with the payment terms of this Contract shall be considered such a substantial failure. In the event of a substantial failure on the part of the Client, Company, in addition to the right to terminate set forth in this paragraph, may also elect to suspend work until the default in question has been cured. No delay or omission on the part of either party in exercising any right or remedy hereunder shall constitute a waiver of any such right or remedy on any future occasion. The effectiveness of a termination by Client will be conditioned upon receipt by Company of such

payment for all services rendered and materials supplied (including materials specifically manufactured/made for the Client that have yet to be supplied), if any, through the date of termination. If Client incurs costs for damages due to a default of the Company that results in termination of this Contract, Client may deduct such costs or damages from the final payment due to Company. Such deduction will not exceed the final payment owed to Company and will constitute a full and final settlement between Client and Company for any and all claims against Company by Client and a release by Client of any and all further claims against Company.

**Additional Work.** (a) All additional labor, materials, tools, bonds, insurance, equipment, licenses, taxes, transportation, surveys, engineering, other professional services and any additional item provided by or on behalf of the Company because of Force Majeure or a Change of Law shall constitute additional work extending beyond the scope of the Services to be provided by Company hereunder. Company shall be compensated for all such additional work commensurate with the appropriate unit prices and/or hourly rates indicated in this contract and if no such prices or rates are provided, Company shall be compensated for the fair and equitable value of such additional work in an amount reasonably agreeable to the parties; (b) The parties may add, delete, modify, alter, or accelerate the Services to be performed hereunder, including without limitation, order changes to the Services, or require the Company to perform additional services but only through a duly executed change or field order. All change and field orders shall be in writing and require the signature and acceptance by Company prior to becoming effective. Unless agreed to otherwise by the Company, all such change and field orders shall reflect the parties' agreement regarding price and proposed completion date.

**Payment Terms.** For any estimate over \$2,000.00, Client shall pay the Company 50% of the estimated project price upon execution of this Contract and the remainder shall be due upon completion of the services. Unless specifically stated otherwise, all payments are due thirty (30) days from the date of final invoice. Any payment delayed beyond the specified due date shall be subject to one and one-half percent (1.5%) per month interest on the unpaid balance.

**Taxes.** Client shall pay all property, franchise, sales, use and other taxes associated with the Services other than taxes imposed on Company's net income or Company's payroll taxes. The prices hereunder do not include sales, use, excise, ad valorem, property or other taxes, other than taxes based on income, now or hereafter imposed directly or indirectly, by any governmental authority or agency with respect to this Contract and the Services provided and materials furnished hereunder. Client shall pay directly or reimburse Company for any such taxes that Company may be required to pay, including without limitation, sales and/or use taxes that Company may be required to pay, under Applicable Law, in connection with Company's purchase or use, in performing the Services hereunder, of equipment, supplies, material and/or subcontracted services.

**Indemnification.** *To the maximum extent permitted by law, each party (the "Indemnifying Party") shall defend, indemnify and hold harmless the other party and their respective successors and assigns (each is referred to herein as an "Indemnified Party") against any and all liability for damages, costs, losses, and expenses, including reasonable attorney's fees, resulting from any claim asserted by a third party against the Indemnified Party for wrongful death, bodily injury and/or property damage, but only to the extent caused by the willful or negligent acts or omissions of the Indemnifying Party.*

**Company's Liability.** The Company's maximum liability for all claims under this Contract shall not exceed an amount equal to the Contract Price for the year in which the claim arises. Notwithstanding any provision to the contrary contained in this Contract, in no event shall either party be liable, either directly or indirectly, for any special, punitive, indirect and/or consequential damages, including damages attributable to loss of use, loss of income or loss of profit even if such party has been advised of the possibility of such damages.

**Client Instructions.** Under no circumstances shall Company be responsible for any damages, losses, settlement, payment deficiencies, liabilities, costs and expenses arising directly or indirectly because of the execution or implementation of instruction or directions provided by the Client or any of its directors, officers, employees, agents, or representatives.

**Client Information and Records.** If any information, opinions, recommendations, advice, or other work product or any data, information, procedures, charts, spreadsheets, logs, instruments, documents, plans, designs, specifications, operating manuals and specifications, information, regulatory filings, permits, authorizations, licenses, maintenance records, or other records are provided by the Client or any third party acting on behalf the Client are provide to and used or relied on by Operator, the Client will be liable for any damages resulting directly or indirectly from such use and reliance.

**Risk of Loss.** Any losses or other liabilities resulting from theft, damage or unauthorized use of Client's property, by any party other than Company, shall be borne by the Client.

**Force Majeure.** Any event of Force Majeure that directly or indirectly causes a party to be unable to perform its obligations under this Contract shall not be deemed a breach of this Contract. The occurrence of such event shall suspend the obligations of the affected party for only so long as the impact of such event continues. The obligation to pay amounts due and owing shall not be suspended by such event. The party affected will use commercially reasonable efforts to mitigate the effect of the event.

**Insurance.** Company shall procure and maintain through the period of this Contract, at Company's own cost and expense (a) general liability insurance in the amount of one million dollars (\$1,000,000)

per occurrence and two million dollars (\$2,000,000) in the aggregate; and (b) worker's compensation insurance in accordance with all statutory requirements.

**Governing Law.** This Contract and performance under it shall be governed by and construed in accordance with the laws of the state in which the services are performed.

**Dispute Resolution.** In the event of any disputes, the parties shall first attempt to resolve the situation by good faith discussions in a timely manner. If the dispute cannot be resolved within forty-five (45) days, the parties shall mediate their dispute before a mediator acceptable to both parties, if they cannot agree, they shall ask the Director of the Federal Mediation and Conciliation Service to nominate a mediator. The parties shall bear their own costs of the mediation, but the parties shall share equally the costs of the mediator and the mediation facilities. If the parties are unable to resolve any disputes through good faith discussions or mediation, either party may request that such dispute be submitted for binding arbitration, which shall be governed by the rules of the American Arbitration Association or such other rules as the parties may agree. The parties agree that any judgment issued as a result of arbitration may be entered in the court having jurisdiction thereof. The parties agree that arbitration shall be the exclusive means to settle any dispute, controversy or claim arising out of this Contract.

**Notices.** Wherever under this Contract one party is required or permitted to give notice to the other party, such notice shall be in writing and shall be delivered personally, sent by facsimile transmission, sent by nationally recognized express courier or sent by certified, registered, first class mail, postage prepaid, but not by electronic mail. Notices required to be given to the parties by each other will be addressed to:

Company:  
Inframark, LLC  
2002 West Grand Parkway North, Suite 100  
Katy, Texas 77449  
Attn: Chris Tarase

With copy to  
Inframark, LLC  
220 Gibraltar Road, Suite 200  
Horsham, PA 19044  
Attn: Legal Department

Client:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Attn: \_\_\_\_\_

Any such notice shall be deemed given when actually received when delivered either personally, by facsimile transmission or by express courier, or if mailed, on the fifth day after its mailing, postage prepaid to the recipient party.

**Successors and Assigns.** This Contract shall not be assigned by either party without the prior written consent of the other party unless such assignment shall be to a parent, subsidiary, affiliate, or successor of either Party or to the extent that any assignment, subletting or transfer is mandated by law or the effect of this limitation may be restricted by law. When written consent of a party is required, such consent shall not be unreasonably withheld.

**Non-Solicitation.** Neither party may actively solicit, for hire, the employees of the other party during the term of this Contract or for one (1) year after termination of this Contract.

**Severability.** Each and every provision of law and government regulation required by law to be inserted in this Contract shall be deemed to be inserted and this Contract shall read and shall be enforced as though so included herein, and if through mistake or otherwise any such provision is not inserted or is not correctly inserted, then upon the application of either party, this Contract shall be deemed to be amended to make such insertion or correction. If this Contract contains any unlawful provision, the same shall be deemed of no effect and shall, upon the application of either party, be deemed stricken from this Contract without affecting the binding force of the remainder.

**No Third-Party Beneficiaries.** This Contract is entered into solely between and may be enforced only by the Company and Client; and this Contract shall not be deemed to create any rights in third parties, including clients, suppliers, or customers of a party, or to create any obligations of a party to any such third parties.

**Construction of Agreement.** Whenever the context requires, the gender of all words used in this Contract includes the masculine, feminine, and neuter. All references to Articles and Sections refer to articles and sections of this Contract, and all references to Exhibits are to Exhibits attached to this all purposes. Captions, headings, cover pages, tables of contents and footnote instructions contained in this Contract are inserted only to facilitate reference and for convenience and in no way define, limit or describe the scope, intent or meaning of any provisions of this Contract. Words and abbreviations that have well known technical or trade meanings are used in this Contract in accordance with such recognized meanings.

**Entire Agreement.** The terms and conditions set out herein are the entire terms and conditions of this Contract and any prior or contemporaneous understandings or agreements, oral or written, are merged herein. There are no representations or warranties, agreements, or covenants other than those expressly set forth in this Contract. This Contract may be amended or modified and/or any right or obligation arising under this Contract may be waived from time to time only by a written

instrument executed by the Client and the Company. The failure of the Company at any time to enforce any of the provisions of this Contract shall not constitute a waiver of such provision.

Dear All,

Please be advised that, effective March 30, 2026, a fuel surcharge will be applied to every load. This surcharge is necessary due to the recent sharp increase in fuel prices. The fuel surcharge will be invoiced as a separate line item, and we ask that you also add this as a separate line item on your orders.

Given the volatility of fuel prices, we will provide the exact surcharge amount one week prior to installation. **The surcharge will be discontinued once average fuel prices fall below \$3.75 per gallon.**

Our fuel surcharge is based on the difference between the Lower Atlantic (PADD 1C) diesel index published by the U.S. Energy Information Administration and the average price for the three months ended February 2026, applied to fuel consumption on a per load basis considering delivery radius and time on site.

[https://www.eia.gov/dnav/pet/pet\\_pri\\_gnd\\_dcus\\_r1z\\_w.htm](https://www.eia.gov/dnav/pet/pet_pri_gnd_dcus_r1z_w.htm)

For the week of March 30 through April 6, the fuel surcharge rate will be **\$.71 per yard.**

This surcharge will apply to all jobs scheduled for installation after March 30. We regret the short notice, but we waited through last week in hopes that fuel prices would begin to decline, but unfortunately they have not declined or stabilized. Since March 2, 2026, fuel prices on average have increased by \$1.25 per gallon.

You are a valued partner, and we appreciate your business. We hope you understand the necessity for the surcharge and that it is outside of our control. Please let us know if you have any questions.

Regards,

FCM Industries Opco, LLC  
dba American GroundPro, First Coast Mulch, EZ-Mulch

FCM INDUSTRIES  
PO Box 550512  
Jacksonville, FL 32255



**EZ Mulch now American GroundPro**  
 PO Box 550512  
 Jacksonville, FL 32255 US  
 +19042545366  
 AR@americangroundpro.com

# Estimate



ADDRESS
Inframark 630 Kingsley Ave # B Orange Park, FL 32073

SHIP TO
Suncoast CDD Meadowbrook Drive Land O' Lakes, FL 34638

ESTIMATE #	DATE
6074	04/22/2026

**PROJECT STATUS**

4 Pending

DATE	PRODUCT / SERVICE	DESCRIPTION	AMOUNT
	<b>Mini Pine Bark - TPA</b>	Installation of Mini Pine Bark as directed and indicated on the approved map not to exceed 300 yards.  Suncoast CDD Meadowbrook Drive Land O' Lakes, FL 34638  Alba Sanchez - 813.482.1614 Alba.Sanchez@Inframark.com	16,500.00
	<b>Fuel Surcharge</b>	Fuel surcharge of \$0.71 per yard.	213.00

**TOTAL \$16,713.00**

We appreciate your payment. If you choose this method of payment, please send remittance notification to ar@AmericanGroundPro.com. Thank you for the opportunity to bid your project. We look forward to working with you soon!

Payment is required in advance to secure your installation date unless a completed customer packet has been submitted and credit terms have been approved.

Please note that there is a 3% surcharge on all credit card payments. All estimates are valid for 90days.

Accepted By

Accepted Date



# 2026 STEADFAST ALLIANCE



## **INFRAMARK**

*Proposal for Pond Maintenance:*  
Suncoast  
Meadowbrook Drive, Lutz, FL 33558



5/5/2026

Inframark

2005 Pan Am Cir Ste 300, Tampa, FL 33607

Attn: Alba Sanchez

We greatly appreciate the opportunity to bid on this project for you.

Attached is the agreement for waterway services at Suncoast CDD.

Program to consist of areas #1-21 as indicated on attached map.

Area to be serviced measures 24,271 LF & 42.67 AC.

**Occurrence: 4 events/month**

**Annual Cost: \$12,960.00**

**(\$1080.00 per month)**

Special services can also be provided outside of the routine monthly maintenance at the Board's request.

These will be proposed on separate estimates outside of the monthly maintenance service agreement.

We pride ourselves on providing the highest level of service in the industry and look forward to the opportunity of exceeding your expectations!

Respectfully yours,

*Kevin Riemensperger*

Steadfast Contractors Alliance, LLC.

Kevin Riemensperger, Aquatics Division Manager

## Maintenance Contract

### Aquatic Maintenance Program

1. **Algaecide Application:** John Deere Gators, equipped with dual spray-tank systems and outfitted with extendable hose reel will be utilized to carry out topical & subsurface applications of algaecide approved for controlling filamentous, planktonic, & cyanobacterial algae growth in accordance with regulations defined by the Florida Department of Agriculture and Consumer Services. Technicians will utilize easements to access CDD owned property around the pond bank. Applications cover surface waters 7 feet from the shoreline and 2 feet below the surface; up to the high-water mark/edge. Treatment events will occur as listed per month, spaced evenly (pending weather) with additional services available on request.<sup>1</sup>
2. **Herbicide Application:** Utilization of EPA approved herbicides to target invasive/emergent nuisance grasses/brush (vegetation) as defined by Florida Exotic Pest Plant Council; including category 1 & 2 species. Carried out in accordance to regulations defined by Florida Department of Agriculture and Consumer Services. Applications will cover surface waters 5 feet from the shoreline and include vegetation above the water's surface. Along shoreline areas & littoral zones; up to the high-water mark/edge. Treatment events to occur with the same frequency of algaecide applications.<sup>2</sup>
3. **Submersed Vegetation Control:** Submersed Vegetation Control: Treatments with EPA approved herbicides for the removal of submersed vegetation & otherwise undesired aquatic weeds, as defined by Florida Exotic Pest Plant Council. Including, but not limited to both non-native & nuisance species such as Tapegrass, Dwarf Babytears, Chara, etc. Applications to cover entirety of ponds equal to or lesser than 1 surface acre. In ponds greater than 1 surface acre, applications to cover waters 10 feet from shoreline areas & littoral zones, with additional treatment to be provided as a separate proposal at an additional cost.
4. **Debris Collection:** Collection of "litter" items along the shoreline, within reach or up to 1 ft below the surface, during routine maintenance visitations. Individual items to be removed are limited to non-natural materials, such as plastics, Styrofoam, paper, aluminum. Oversized items such as household appliances or large construction debris items are not included in this service; but will instead be logged and brought to the attention of the CDD board. An estimate can be provided to remove these large items on a case-by-case basis. The collection of significant/sudden or profuse influx of debris items may be subject to a mobilization fee.
5. **Pond Dye Application:** Available on request in ponds one acre or less. If so desired, applications of pond dye can be done to enhance aesthetics. Offered in black and hues of blue.
6. **Outflow Inspections:** Water Outflow / Drainage System Inspection: At the commencement of the contract, Steadfast will require notification of known drainage issues. Throughout the contract, outflow structures will be periodically inspected to insure proper drainage/functionality.\*<sup>3</sup>

**Enhancement Services:** Not included as part of the routine maintenance scope. These services can be provided as a separate proposal at an additional cost if desired

1. **Physical & Mechanical Removals of Invasive/Exotic Vegetation.** – Utilization of crews with handheld cutting equipment to flush cut, remove and dispose of vegetation off-site. Alternative method of heavy machinery to mulch in-place vegetation within the conservation buffer zones. Buffer zones lie in between the wetland jurisdiction line and the sod of resident properties and common area.
2. **Planting of Native & Desirable, Low-lying Aquatic Vegetation** – Installation of Florida-native flora to improve aesthetics & assist in the control of aquatic algae. Bare root installation as well as container grown plants are available.
3. **Aquatic Fountain & Aeration Installation** – Installation of aquatic fountains to improve the aesthetics of ponds. Installation of bottom diffused aeration to circulate water and to increase its oxygen content to reduce algal growth, while also improving the health of a pond's fish, allowing for better insect control.
4. **Native Fish Stocking** – Stocking of Florida-native species such as Bluegill, Redear Sunfish/Shell Crackers, Gambusia will greatly impact the populations of mosquito and midge fly larvae in your waterway. Seasonal availability will affect pricing for stocking different varieties of fish.
5. **Triploid Grass Carp Stocking** – Introduction of sterile Grass Carp as a biological control of submersed aquatic plant/weed species.
6. **Excess Trash/Oversize Object Collection Visits** – Proposals to remove excess debris from heavy construction, bizarre & oversize items that may make their way into your lakes and ponds.
7. **Seasonal Midge Fly Treatments** – Applications of larvicide for the control of Midge Fly larvae. This is done twice a year to control and maintain Midge Fly populations. Most effective in summer (April-June) and fall (September-October).

*\*These services to be performed at Steadfast's discretion, and for the success of the aquatic maintenance program. <sup>1</sup> There may be light regrowth following a treatment event. This growth will be addressed during the following treatment event, or in extreme cases by service request. <sup>2</sup> Herbicide applications may be reduced during the rainy season/in anticipation of significant rain/wind events to avoid damaging submerged stabilizing grasses, and to prevent leaving a ring of dead grasses on the upper bank. <sup>3</sup> Identification of improper drainage or damaged outflow structures does not imply responsibility for repairs. Responsibility for repairs is not included in the scope of work.*



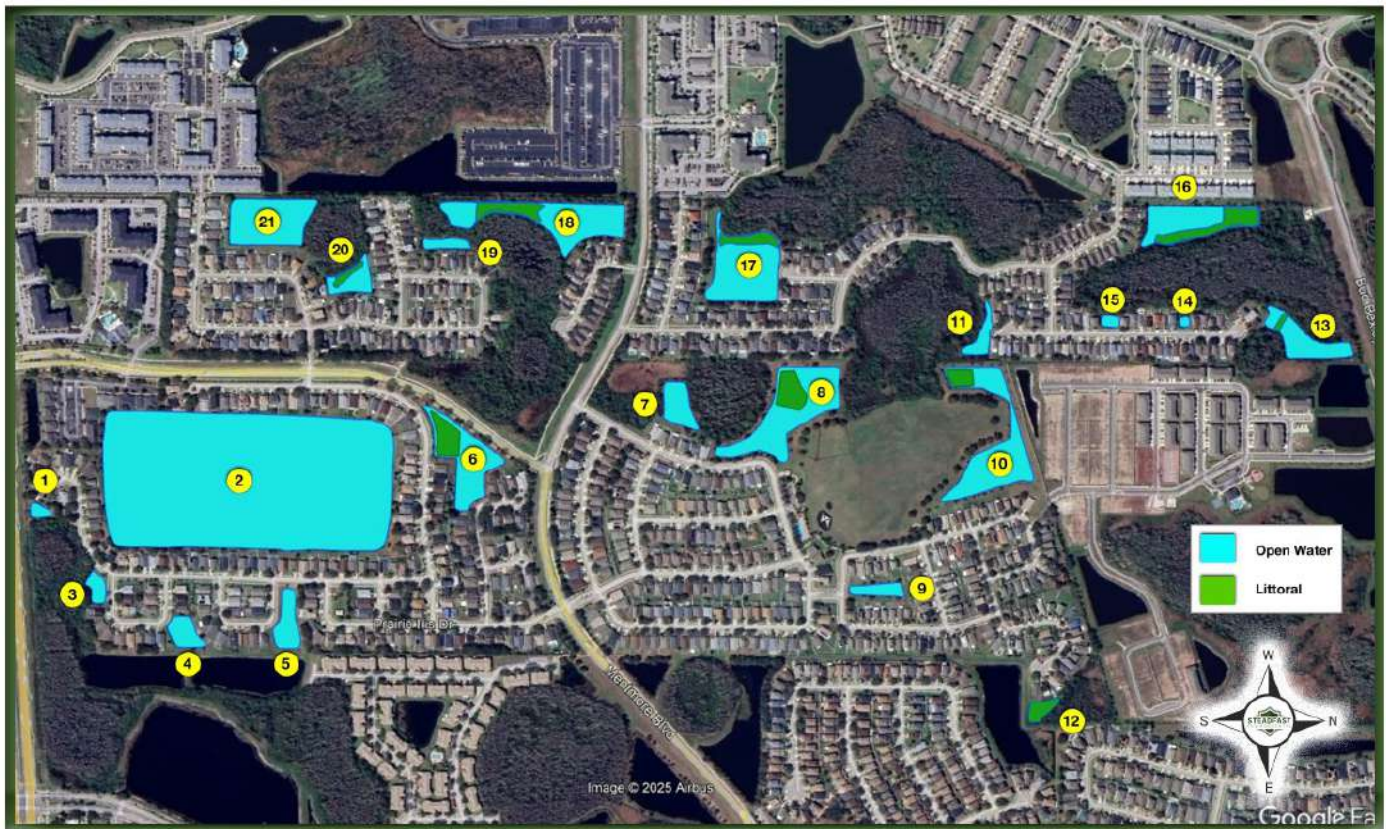
Service Area



# SUNCOAST CDD

Meadowbrook Dr, Lutz, FL 33558

Gate Code:



**Agreement**

The contract will run for one year starting \_\_\_\_\_. If upon expiration of this agreement, both parties have not signed a new contract, this contract shall automatically be renewed for a one-year term. Changes to contract prices shall be in writing and agreed upon by both parties.

The goal of this contract is that upon completion of each visit to the client, the aquatic appearance shall be maintained to the highest reasonable standard possible given the nature of the property and its individual condition.

Steadfast Contractors Alliance, LLC. / Steadfast Environmental, here after referred to contractor, agrees to furnish all supervision, labor, materials, supplies, and equipment to perform the work herein above. Proof of insurance and necessary licenses will be provided if requested by client. Contractor will also provide workman’s compensation and proof thereof on employees if requested by client.

The contract does not attempt to address damage caused by vandalism, floods, hurricanes, poor drainage, or other incidents beyond the control of the contractor. The contractor will endeavor to address such contingencies upon client’s request by separate agreement.

**Compensation**

Contractor shall be paid monthly. On the first (1<sup>st</sup>) day of the month, the Contractor shall tender to the Customer and bill or invoices for those services rendered during the current month which shall be paid by the Customer by the first day of the following month.

**Conditions:**

This contract is for a period of (12) twelve months. This agreement shall remain in force for a period of 1 year. If, upon expiration of this agreement, a new agreement has not been executed by both parties, this agreement shall automatically be renewed for a period of 1 year from the date of expiration of the previous term at the annual fees stated with the addition of a 3.5% cost of living increase. Either party may cancel this contract, with or without cause, with a thirty (30) day written notice by certified mail.

No Finance Charge will be imposed if the total of such purchases is paid in full within 30 days of invoice date. If not paid in full within 30 days, then a FINANCE CHARGE will be imposed from the invoice date on the balance of purchases at a periodic rate of 1 1/2 % per month (18% Annual) until paid and Steadfast Contractors Alliance, LLC. / Steadfast Environmental, LLC, DBA Steadfast, shall have the right to elect to stop work under this Contract until all outstanding amounts, including Finance Charges, are paid in full. Payments will be applied to the previously billed Finance Charges, and thereafter, in order, to the previous invoices and finally to the New Invoices. In the event, any or all the amounts due under this Agreement are collected by or through an attorney, the Purchaser/Owner agrees to pay all reasonable attorneys' fees.

Utilities Usage: The Client shall allow the Contractor usage of utilities if needed.

Fuel Surcharge: For purposes of this agreement, the standard price for (1) gallon of regular unleaded fuel shall be specified as the Florida average price per the Florida Attorney General's office. In the event that the average price is escalated over that of \$4.00 per gallon, a 3% fuel surcharge shall be added to each invoice. The 3% fuel surcharge will be suspended from all future invoices when the average gallon price drops below that of \$4.00 per gallon, however, the charge may again be implemented in the future invoices should the average gallon price again escalates over the established \$4.00 base price.

Change in Law: This Agreement is based on the laws and regulations existing at the date of execution. In the event that a governmental authority enacts laws or modifies regulations in a manner that increases the Contractor's costs associated with providing the services under this Agreement, the Contractor reserves the right to notify Client in writing of such material cost increase and to adjust pricing accordingly as of the effective date of such cost increase. Contractor must submit clear documentation supporting the cost increase and can only increase pricing to the extent of actual costs incurred.

This contract is withdrawn unless executed within ninety (90) days of the date of this document.

Thank you for the opportunity to submit this contract. We look forward to becoming part of your team.

By signing this Agreement in the space provided below, the undersigned Client signatory hereby represents and confirms that it has full power and authority to enter this Agreement on its own behalf and on behalf of the record owner of the service area, and that this Agreement is a legally binding obligation of the undersigned and the record owner of the service area.

In witness, whereof the parties to this agreement have signed and executed it this \_\_\_\_\_ day of \_\_\_\_\_ 2026.

*Matt Goldrick*

\_\_\_\_\_  
Steadfast Representative

Account Manager

\_\_\_\_\_  
Title

\_\_\_\_\_  
Signature of Owner or Agent

\_\_\_\_\_  
Title



## Aquatic Maintenance Contract

The Contractor's performance under this Agreement shall be excused without penalty to the extent the Contractor is unable to perform due to circumstances beyond its commercially reasonable control, including but not limited to:

- Accidents, acts of God, or extreme weather conditions
- Inability to secure labor and/or materials
- Fire, earthquake, or other natural disasters
- Rules, regulations, or restrictions imposed by any governmental authority
- National or regional emergencies, epidemics, pandemics, or other health-related outbreaks not caused by either party
- Other delays or failures resulting from causes beyond the Contractor's reasonable control

For the purposes of this Agreement, the parties specifically agree that water conservation regulations or guidelines are included within the aforementioned governmental restrictions. The Contractor shall not be held liable for any failure to perform as a direct or indirect result of compliance with, or good faith efforts to comply with, state or local water regulations or mandates.

This contract shall be deemed withdrawn unless executed within ninety (90) days of the date of this document. We appreciate the opportunity to submit this agreement and look forward to the possibility of becoming part of your team, working together to achieve exceptional results.

By signing this agreement in the space provided below, the undersigned Client signatory represents and warrants that they have full authority to enter into this agreement on their own behalf and on behalf of the record owner of the service area. The Client further acknowledges that this agreement constitutes a legally binding obligation of the undersigned and the record owner of the service area.

In witness, whereof the parties to this agreement have signed and executed it this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_.

\_\_\_\_\_  
Client

Steadfast \_\_\_\_\_

\_\_\_\_\_  
Signature of Representative

\_\_\_\_\_  
Signature of Owner or Agent

\_\_\_\_\_  
Title

\_\_\_\_\_  
Title

### Billing Information

<b>Client Business Name:</b>		<b>Client Contact Name:</b>	
<b>Client Contract Number:</b>		<b>Client Contact Email:</b>	
<b>Billing Business Name:</b>		<b>Billing Contact Name:</b>	
<b>Billing Contact Phone:</b>		<b>Billing Contact Address:</b>	

Any special billing requirements or notes:



April 20, 2026 Minutes

SUNCOAST CDD

43 **B. Inframark Field Inspection March 2026 Report**  
 44 Mr. Fowler presented the Field Inspection Report, providing a high-level overview of the  
 45 District’s landscape and pond conditions.

46  
 47 **C. Fieldstone Landscape Report**  
 48 Ms. Moore from Fieldstone presented the Landscape Report.

49  
 50 **i. Fieldstone Proposal #22826 - Replacement of Plants at the Front Entrance**  
 51

52 On MOTION by Ms. Ramacco, seconded by Mr. Thebeau, with all in  
 53 favor, Fieldstone Proposal #22826 for replacement of plants at the front  
 54 entrance in the amount of \$1,572.46 was approved.

55  
 56 **D. Fieldstone Irrigation Report**  
 57 The Irrigation Report was presented.

58  
 59 **i. Fieldstone Proposal #22825 – Irrigation Repairs**  
 60

61 On MOTION by Mr. Thebeau, seconded by Mr. Latif III, with all in  
 62 favor, Fieldstone Proposal #22825 for irrigation repairs in the amount  
 63 of \$2,282.20 was approved.

64  
 65 Mr. Thebeau requested that Inframark contact the vendor who previously installed the  
 66 mulch to request a proposal for the same scope of work, and to determine whether the vendor  
 67 would honor the pricing provided to the District during the previous year.

68  
 69 **E. District Counsel Report**  
 70 Mr. Latif III requested that District Counsel provide a copy of the notice sent to the  
 71 owners who installed a camera on CDD property.

72  
 73 **F. District Engineer Report**  
 74 There were no updates.

75  
 76 **G. District Manager Report**  
 77 There were no updates.

78  
 79 **FIFTH ORDER OF BUSINESS** **Business Items**  
 80 **A. Motion to Pay off the Operational Loan Remaining Balance Line of Credit of**  
 81 **\$50,000**  
 82

April 20, 2026 Minutes

SUNCOAST CDD

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121

On MOTION by Mr. Thebeau, seconded by Mr. Latif III, with all in favor, to pay off the remaining balance of the Operational Loan Line of Credit in the amount of \$50,000 was approved.

**B. Consideration of Porter Proposals**

- i. Neptune Multi Services LLC
- ii. Jayman Enterprises, LLC
- iii. Inframark

The Board reviewed the Porter proposals.

On MOTION by Mr. Latif III, seconded by Mr. Vento, with all in favor, Jayman Enterprises, LLC Proposal #1355 in the amount of \$16,250 was approved, with services to commence on May 1, 2026.

Inframark will contact the vendor and provide the required notification.

**C. Request Schedule for Irrigation Systems**

Fieldstone was tasked with providing the Board with the start times for each irrigation zone.

**D. Discussion on Fountain Repairs**

The Board requested three proposals for the repairs to the pond fountain located behind Odessa and Keysgate Way. The scope of service shall include the following:

- Fountain replacement
- Replacement of cable
- Replacement of the circuit breaker - an existing electrical power source is already in place

The Board also requested that the vendors attend the meeting to present their proposals.

**E. Removal of Red and Green Holiday Lights on Meadowbrook Fountain**

**F. Discussion on Relocation of Post on Mentmore to Butterfly Landing**

Mr. Fowler will coordinate an on-site meeting with Ms. Ramacco to confirm the proposed relocation of the post. Additionally, Mr. Fowler will notify the pond vendor to remove the holiday lights from the Meadowbrook fountain.

**G. Discussion on Upcoming Tree Trimming Schedule**

Ms. Moore was tasked with providing the Board with the upcoming tree canopy uplifting schedule.

April 20, 2026 Minutes

SUNCOAST CDD

122 **H. Discussion on Pressure Washing Sidewalks and Fence on Mentmore (Southwest**  
123 **of Meadowbrook)**

124 Inframark was tasked with securing three pressure washing proposals for all sidewalks and  
125 monument curbing on Mentmore Road and Meadowbrook, as well as the fence located at the  
126 southwest corner of Mentmore Road.

127  
128 **SIXTH ORDER OF BUSINESS Business Administration**

129 **A. Approval of Minutes of the Regular Meeting Held on March 11, 2026**

130  
131 On MOTION by Mr. Thebeau, seconded by Mr. Vento, with all in favor,  
132 the Minutes of the Regular Meeting Held on March 11, 2026, were  
133 approved as presented.

134  
135 **B. Review of February 2026 Financial Report and Consideration of Check Register**

136  
137 On MOTION by Mr. Thebeau, seconded by Mr. Vento, with all in favor,  
138 the February 2026 Financial Report was accepted, and the Check  
139 Register was approved.

140  
141 **SEVENTH ORDER OF BUSINESS Supervisors' Requests or Comments**

142 Ms. Ramacco requested that Inframark contact Danielle Fencing to inspect the 42 trees that  
143 are pressing against and/or displacing the fences they installed and to provide a recommended  
144 solution.

145  
146 **EIGHTH ORDER OF BUSINESS Audience Comments**

147 There being none, the next order of business followed.

148  
149 **NINTH ORDER OF BUSINESS Adjournment**

150 There being no further business,

151  
152 On MOTION by Ms. Ramacco, seconded by Ms. Latif, with all in favor, the  
153 meeting was adjourned at 8:30 p.m.

154  
155  
156  
157 \_\_\_\_\_  
158 Alba Sanchez  
District Manager

157 \_\_\_\_\_  
Matthew Thebeau  
Chairperson



*Suncoast  
Community  
Development  
District*

*Financial Report*

*March 31, 2026*

**CLEAR PARTNERSHIPS**



**SUNCOAST COMMUNITY DEVELOPMENT DISTRICT**

**Balance Sheet**

As of March 31, 2026

(In Whole Numbers)

ACCOUNT DESCRIPTION	SERIES 2014					TOTAL
	GENERAL FUND	SERIES 2014 DEBT SERVICE FUND	CAPITAL PROJECTS FUND	GENERAL FIXED ASSETS FUND	GENERAL LONG-TERM DEBT FUND	
<b>ASSETS</b>						
Cash In Bank	\$ 600,316	\$ -	\$ -	\$ -	\$ -	\$ 600,316
Due From Other Funds	-	2,092	-	-	-	2,092
Investments:						
Reserve Fund	-	199,966	-	-	-	199,966
Revenue Fund	-	666,691	-	-	-	666,691
Deposits	45	-	-	-	-	45
Fixed Assets						
Improvements - Streetlights	-	-	-	19,244	-	19,244
Improvements	-	-	-	61,080	-	61,080
Stormwater System	-	-	-	1,876,815	-	1,876,815
Landscaping	-	-	-	877,835	-	877,835
Amount Avail In Debt Services	-	-	-	-	868,750	868,750
Amount To Be Provided	-	-	-	-	1,936,250	1,936,250
<b>TOTAL ASSETS</b>	<b>\$ 600,361</b>	<b>\$ 868,749</b>	<b>\$ -</b>	<b>\$ 2,834,974</b>	<b>\$ 2,805,000</b>	<b>\$ 7,109,084</b>
<b>LIABILITIES</b>						
Accounts Payable	\$ 836	\$ -	\$ -	\$ -	\$ -	\$ 836
Bonds Payable - Series 2014	-	-	-	-	2,755,000	2,755,000
Due To Other Funds	2,092	-	-	-	-	2,092
Notes Payable-Valley LOC	-	-	-	-	50,000	50,000
<b>TOTAL LIABILITIES</b>	<b>2,928</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>2,805,000</b>	<b>2,807,928</b>
<b>FUND BALANCES</b>						
Restricted for:						
Debt Service	-	868,749	-	-	-	868,749
Unassigned:	597,433	-	-	2,834,974	-	3,432,407
<b>TOTAL FUND BALANCES</b>	<b>597,433</b>	<b>868,749</b>	<b>-</b>	<b>2,834,974</b>	<b>-</b>	<b>4,301,156</b>
<b>TOTAL LIABILITIES &amp; FUND BALANCES</b>	<b>\$ 600,361</b>	<b>\$ 868,749</b>	<b>\$ -</b>	<b>\$ 2,834,974</b>	<b>\$ 2,805,000</b>	<b>\$ 7,109,084</b>

**SUNCOAST COMMUNITY DEVELOPMENT DISTRICT**  
**Statement of Revenues, Expenditures and Changes in Fund Balances**  
 For the Period Ending March 31, 2026  
 General Fund (001)  
 (In Whole Numbers)

ACCOUNT DESCRIPTION	ANNUAL ADOPTED BUDGET	YEAR TO DATE ACTUAL	VARIANCE (\$) FAV(UNFAV)	YTD ACTUAL AS A % OF ADOPTED BUD
<b>REVENUES</b>				
Interest - Investments	\$ -	\$ 9,560	\$ 9,560	0.00%
Interest - Tax Collector	-	53	53	0.00%
Special Assmnts- Tax Collector	679,103	662,049	(17,054)	97.49%
<b>TOTAL REVENUES</b>	<b>679,103</b>	<b>671,662</b>	<b>(7,441)</b>	<b>98.90%</b>
<b>EXPENDITURES</b>				
<b>Administration</b>				
Supervisor Fees	13,000	5,600	7,400	43.08%
Arbitrage Rebate Calculation	600	600	-	100.00%
Trustees Fees	4,800	4,849	(49)	101.02%
Disclosure Report	4,200	-	4,200	0.00%
District Counsel	10,000	1,979	8,021	19.79%
District Engineer	7,000	6,482	518	92.60%
District Management	35,895	19,489	16,406	54.29%
Auditing Services	6,000	6,200	(200)	103.33%
Postage, Phone, Faxes, Copies	250	12	238	4.80%
Rentals & Leases	2,000	981	1,019	49.05%
General Liability Insurance	4,328	4,078	250	94.22%
Public Officials Insurance	3,506	3,303	203	94.21%
Property & Casualty Insurance	15,197	13,905	1,292	91.50%
Legal Advertising	1,000	-	1,000	0.00%
Bank Fees	100	-	100	0.00%
Payroll Services	-	46	(46)	0.00%
Website Development & Maintenance	1,552	1,855	(303)	119.52%
Dues, Licenses & Fees	175	824	(649)	470.86%
Operating Loan Repayment	100,000	53,400	46,600	53.40%
HOA Loan Repayment	50,000	-	50,000	0.00%
<b>Total Administration</b>	<b>259,603</b>	<b>123,603</b>	<b>136,000</b>	<b>47.61%</b>
<b>Electric Utility Services</b>				
Electric Utility Services	17,600	8,249	9,351	46.87%
Street Lights	60,000	38,479	21,521	64.13%
<b>Total Electric Utility Services</b>	<b>77,600</b>	<b>46,728</b>	<b>30,872</b>	<b>60.22%</b>
<b>Water-Sewer Comb Services</b>				
Water Utility Services	900	197	703	21.89%
<b>Total Water-Sewer Comb Services</b>	<b>900</b>	<b>197</b>	<b>703</b>	<b>21.89%</b>
<b>Stormwater Control</b>				
Aquatic Contract	13,000	6,790	6,210	52.23%
Lake/Pond Bank Maintenance	2,500	440	2,060	17.60%
Mitigation Area Monitoring & Maintenance	1,000	-	1,000	0.00%

**SUNCOAST COMMUNITY DEVELOPMENT DISTRICT**  
**Statement of Revenues, Expenditures and Changes in Fund Balances**  
 For the Period Ending March 31, 2026  
 General Fund (001)  
*(In Whole Numbers)*

ACCOUNT DESCRIPTION	ANNUAL ADOPTED BUDGET	YEAR TO DATE ACTUAL	VARIANCE (\$) FAV(UNFAV)	YTD ACTUAL AS A % OF ADOPTED BUD
Aquatic Plant Replacement	2,000	-	2,000	0.00%
Capital Improvements	34,000	20,100	13,900	59.12%
<b>Total Stormwater Control</b>	<b>52,500</b>	<b>27,330</b>	<b>25,170</b>	<b>52.06%</b>
<b><u>Other Physical Environment</u></b>				
Field Services	12,000	6,320	5,680	52.67%
Landscape Maintenance - Other	6,000	4,222	1,778	70.37%
Irrigation Repairs and Maintenance	6,000	8,261	(2,261)	137.68%
Landscape Maintenance	104,000	54,796	49,204	52.69%
Landscape Replacement Plants, Shrubs, Trees	15,000	9,004	5,996	60.03%
Entrance, Monuments, Walls Maintenance & Repair	12,000	11,500	500	95.83%
Miscellaneous Maintenance	6,000	12,307	(6,307)	205.12%
Aquatic Other	6,000	-	6,000	0.00%
Holiday Lights	20,000	2,250	17,750	11.25%
<b>Total Other Physical Environment</b>	<b>187,000</b>	<b>108,660</b>	<b>78,340</b>	<b>58.11%</b>
<b><u>Road and Street Facilities</u></b>				
Pavement & Signage Repairs	1,500	-	1,500	0.00%
<b>Total Road and Street Facilities</b>	<b>1,500</b>	<b>-</b>	<b>1,500</b>	<b>0.00%</b>
<b><u>Contingency</u></b>				
Reserves	100,000	22,000	78,000	22.00%
<b>Total Contingency</b>	<b>100,000</b>	<b>22,000</b>	<b>78,000</b>	<b>22.00%</b>
<b>TOTAL EXPENDITURES</b>	<b>679,103</b>	<b>328,518</b>	<b>350,585</b>	<b>48.38%</b>
Excess (deficiency) of revenues Over (under) expenditures	-	343,144	343,144	0.00%
<b>FUND BALANCE, BEGINNING (OCT 1, 2025)</b>		<b>254,289</b>		
<b>FUND BALANCE, ENDING</b>		<b>\$ 597,433</b>		

**SUNCOAST COMMUNITY DEVELOPMENT DISTRICT**  
**Statement of Revenues, Expenditures and Changes in Fund Balances**  
 For the Period Ending March 31, 2026  
 Series 2014 Debt Service Fund (201)  
*(In Whole Numbers)*

ACCOUNT DESCRIPTION	ANNUAL ADOPTED BUDGET	YEAR TO DATE ACTUAL	VARIANCE (\$) FAV(UNFAV)	YTD ACTUAL AS A % OF ADOPTED BUD
<b><u>REVENUES</u></b>				
Interest - Investments	\$ -	\$ 11,018	\$ 11,018	0.00%
Special Assmnts- Tax Collector	385,218	377,533	(7,685)	98.01%
<b>TOTAL REVENUES</b>	<b>385,218</b>	<b>388,551</b>	<b>3,333</b>	<b>100.87%</b>
<b><u>EXPENDITURES</u></b>				
<b><u>Debt Service</u></b>				
Principal Debt Retirement	265,000	-	265,000	0.00%
Interest Expense	111,775	55,794	55,981	49.92%
<b>Total Debt Service</b>	<b>376,775</b>	<b>55,794</b>	<b>320,981</b>	<b>14.81%</b>
<b>TOTAL EXPENDITURES</b>	<b>376,775</b>	<b>55,794</b>	<b>320,981</b>	<b>14.81%</b>
Excess (deficiency) of revenues Over (under) expenditures	8,443	332,757	324,314	3941.22%
<b><u>OTHER FINANCING SOURCES (USES)</u></b>				
Contribution to (Use of) Fund Balance	8,443	-	(8,443)	0.00%
<b>TOTAL FINANCING SOURCES (USES)</b>	<b>8,443</b>	<b>-</b>	<b>(8,443)</b>	<b>0.00%</b>
Net change in fund balance	<u>\$ 8,443</u>	<u>\$ 332,757</u>	<u>\$ 307,428</u>	<u>3941.22%</u>
<b>FUND BALANCE, BEGINNING (OCT 1, 2025)</b>		<b>535,992</b>		
<b>FUND BALANCE, ENDING</b>		<u><b>\$ 868,749</b></u>		

# Bank Account Statement

Suncoast CDD

**Bank Account No.** 3601  
**Statement No.** 03-26

**Statement Date** 03/31/2026

<b>G/L Account No. 101002 Balance</b>	600,315.84	<b>Statement Balance</b>	608,731.64
		<b>Outstanding Deposits</b>	0.00
<b>Positive Adjustments</b>	0.00		
<b>Subtotal</b>	600,315.84	<b>Subtotal</b>	608,731.64
<b>Negative Adjustments</b>	0.00	<b>Outstanding Checks</b>	-8,415.80
<b>Ending G/L Balance</b>	600,315.84	<b>Ending Balance</b>	600,315.84

Posting Date	Document Type	Document No.	Vendor	Description	Amount	Cleared Amount	Difference
<b>Deposits</b>							0.00
03/12/2026		JE000594	Special Assmnts- Tax Collector	TC Distribution	6,418.40	6,418.40	0.00
03/31/2026		JE000600	Interest - Investments	Interest Revenue 03/26	1,889.46	1,889.46	0.00
<b>Total Deposits</b>					8,307.86	8,307.86	0.00
<b>Checks</b>							0.00
02/12/2026	Payment	100164	SchoolStatus LLC	Inv: INV-SS-5936	-1,613.00	-1,613.00	0.00
02/12/2026	Payment	100165	ITZ ELECTRIC CORP	Inv: F2066	-6,826.50	-6,826.50	0.00
02/27/2026	Payment	300326	DUKE ENERGY	Inv: 020626-1650- ACH	-2,326.96	-2,326.96	0.00
02/27/2026	Payment	300327	DUKE ENERGY	Inv: 020626-1832- ACH	-2,078.77	-2,078.77	0.00
03/02/2026	Payment	300328	DUKE ENERGY	Inv: 021026-0899- ACH	-1,496.59	-1,496.59	0.00
03/04/2026	Payment	100167	SPRING HILL SUITES MARRIOTT	Inv: 022526-	-152.50	-152.50	0.00
03/04/2026	Payment	100168	BGE INC	Inv: 40286	-147.50	-147.50	0.00
03/04/2026	Payment	100169	FIELDSTONE LANDSCAPE SERVICES LLC	Inv: 27363, Inv: 27362, Inv: 27361	-1,881.41	-1,881.41	0.00
03/04/2026	Payment	100170	INFRAMARK LLC	Inv: 173047	-3,991.25	-3,991.25	0.00
03/05/2026	Payment	1206	SITE MASTERS OF FLORIDA LLC	Check for Vendor V00119	-10,050.00	-10,050.00	0.00
03/09/2026	Payment	100171	STEADFAST ENVIRONMENTAL, LLC	Inv: SA-20629	-970.00	-970.00	0.00
03/09/2026	Payment	100172	SPRING HILL SUITES MARRIOTT	Inv: 030526-	-152.50	-152.50	0.00
03/09/2026	Payment	100173	FIELDSTONE LANDSCAPE SERVICES LLC	Inv: 27505	-9,049.45	-9,049.45	0.00
03/12/2026	Payment	100174	FIELDSTONE LANDSCAPE SERVICES LLC	Inv: 27568	-2,639.10	-2,639.10	0.00
03/12/2026	Payment	100175	PASCO COUNTY PROPERTY	Inv: 26036	-150.00	-150.00	0.00

# Bank Account Statement

Suncoast CDD

**Bank Account No.** 3601  
**Statement No.** 03-26

**Statement Date** 03/31/2026

Date	Type	Account No.	Description	Inv:	Debit	Credit	Balance
03/18/2026	Payment	100176	SPRING HILL SUITES MARRIOTT	Inv: 031126-	-152.50	-152.50	0.00
03/18/2026	Payment	100177	FIELDSTONE LANDSCAPE SERVICES LLC	Inv: 27060, Inv: 1723	-12,274.45	-12,274.45	0.00
03/23/2026	Payment	100178	FIELDSTONE LANDSCAPE SERVICES LLC	Inv: 27583	-557.39	-557.39	0.00
03/23/2026	Payment	100179	INFRAMARK LLC PASCO COUNTY	Inv: 1165858	-1,500.00	-1,500.00	0.00
03/20/2026	Payment	300331	PASCO COUNTY UTILITIES SERV ACH	Inv: 24052539-ACH	-11.00	-11.00	0.00
03/20/2026	Payment	300332	PASCO COUNTY UTILITIES SERV ACH	Inv: 24052536-ACH	-11.00	-11.00	0.00
03/20/2026	Payment	300333	PASCO COUNTY UTILITIES SERV ACH	Inv: 24052538-ACH	-11.00	-11.00	0.00
03/25/2026	Payment	300334	DUKE ENERGY	Inv: 030426-1494-ACH	-64.54	-64.54	0.00
03/25/2026	Payment	300335	DUKE ENERGY	Inv: 030426-1981-ACH	-30.80	-30.80	0.00
03/25/2026	Payment	300337	DUKE ENERGY	Inv: 030426-2453-ACH	-30.80	-30.80	0.00
03/25/2026	Payment	300338	DUKE ENERGY	Inv: 030426-7059-ACH	-160.64	-160.64	0.00
03/25/2026	Payment	300339	DUKE ENERGY	Inv: 030426-2148-ACH	-39.07	-39.07	0.00
03/25/2026	Payment	300340	DUKE ENERGY	Inv: 030426-2304-ACH	-30.80	-30.80	0.00
03/25/2026	Payment	300341	DUKE ENERGY	Inv: 030426-1361-ACH	-103.43	-103.43	0.00
03/25/2026	Payment	300342	DUKE ENERGY	Inv: 030426-2776-ACH	-650.36	-650.36	0.00
03/25/2026	Payment	300343	DUKE ENERGY	Inv: 030426-2601-ACH	-266.79	-266.79	0.00
03/25/2026	Payment	300344	DUKE ENERGY	Inv: 030426-1056-ACH	-58.29	-58.29	0.00
03/25/2026	Payment	300345	DUKE ENERGY	Inv: 030426-0592-ACH	-49.70	-49.70	0.00
03/25/2026	Payment	300346	DUKE ENERGY	Inv: 030426-0732-ACH	-30.80	-30.80	0.00
03/27/2026	Payment	100181	SPRING HILL SUITES MARRIOTT	Inv: 032426-	-152.50	-152.50	0.00
03/27/2026	Payment	100183	STEADFAST ENVIRONMENTAL, LLC	Inv: SA-21762	-970.00	-970.00	0.00
03/27/2026	Payment	300347	DUKE ENERGY	Inv: 030626-1832-ACH	-2,078.67	-2,078.67	0.00
03/27/2026	Payment	300348	DUKE ENERGY	Inv: 030626-1650-ACH	-2,326.86	-2,326.86	0.00
03/13/2026	Payment	DD260	ADP INC	Payment of Invoice 002385	-23.00	-23.00	0.00
03/05/2026		JE000602	Payroll Services	ADP Payroll Fees 260305	-23.00	-23.00	0.00
03/13/2026		JE000603	Supervisor Fees	BOS ADP Wage Pay 260313	-1,000.00	-1,000.00	0.00
03/13/2026		JE000604	Electric Utility Services	Duke Energy #9101 9612 5999 Payment	-149.20	-149.20	0.00
<b>Total Checks</b>					-66,282.12	-66,282.12	0.00

**Adjustments**

**Total Adjustments**

**Outstanding Checks**

03/03/2026	Payment	300329	DUKE ENERGY	Inv: 021026-2924- ACH	-30.80		
03/05/2026	Payment	300330	DUKE ENERGY	Inv: 021326-5999- ACH	-66.22		
03/25/2026	Payment	100180	MCDIRMIT DAVIS & COMPANY, LLC	Inv: 63280	-6,000.00		
03/25/2026	Payment	300336	DUKE ENERGY	Inv: 030426-1220- ACH	-33.25		

# Bank Account Statement

Suncoast CDD

**Bank Account No.** 3601

**Statement No.** 03-26

**Statement Date**

03/31/2026

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03/27/2026	Payment	100182	STRALEY ROBIN VERICKER	Inv: 28115	-789.00
03/31/2026	Payment	300349	DUKE ENERGY	Inv: 031126-0899-ACH	-1,496.53
<b>Total Outstanding Checks</b>					<b>-8,415.80</b>

## Outstanding Deposits

## Total Outstanding Deposits

SUNCOAST COMMUNITY DEVELOPMENT DISTRICT

Payment Register by Fund

For the Period from 03/01/2026 to 03/31/2026

(Sorted by Check / ACH No.)

Fund No.	Check / ACH No.	Date	Payee	Invoice No.	Payment Description	Invoice / GL Description	G/L Account #	Amount Paid
<b>GENERAL FUND - 001</b>								
001	100167	03/04/26	SPRING HILL SUITES MARRIOTT	022526-	Meeting Room Feb 2026	Dues, Licenses & Fees	554020-51301	\$152.50
001	100168	03/04/26	BGE INC	40286	Engineer Services Feb 2026	District Engineer	531147-51301	\$147.50
001	100169	03/04/26	FIELDSTONE LANDSCAPE SERVICES LLC	27363	irrigation repair found from new well installation	Irrigation Repairs and Maintenance	546041-53908	\$724.85
001	100169	03/04/26	FIELDSTONE LANDSCAPE SERVICES LLC	27362	Irrigation repairs Feb 2026	Irrigation Repairs and Maintenance	546041-53908	\$656.98
001	100169	03/04/26	FIELDSTONE LANDSCAPE SERVICES LLC	27361	Landscape Maint Feb 2026	Landscape Maintenance	546300-53908	\$499.58
001	100170	03/04/26	INFRAMARK LLC	173047	March Management Fee March 2026	District Management	531150-51301	\$2,991.25
001	100170	03/04/26	INFRAMARK LLC	173047	March Management Fee March 2026	Field Services	531122-53908	\$1,000.00
001	100171	03/09/26	STEADFAST ENVIRONMENTAL, LLC	SA-20629	Routine Pond Maintenance	Aquatic Contract	534067-53805	\$970.00
001	100172	03/09/26	SPRING HILL SUITES MARRIOTT	030526-	Room Reservation March 2026	Dues, Licenses & Fees	554020-51301	\$152.50
001	100173	03/09/26	FIELDSTONE LANDSCAPE SERVICES LLC	27505	landscape management contract March 2026	Landscape Maintenance	546300-53908	\$9,049.45
001	100174	03/12/26	FIELDSTONE LANDSCAPE SERVICES LLC	27568	Solar Controller for new well March 2026	Irrigation Repairs and Maintenance	546041-53908	\$2,639.10
001	100175	03/12/26	PASCO COUNTY PROPERTY	26036	Annual Renewal FEE March 2026	Dues, Licenses & Fees	554020-51301	\$150.00
001	100176	03/18/26	SPRING HILL SUITES MARRIOTT	031126-	Meeting Room March 2025	Dues, Licenses & Fees	554020-51301	\$152.50
001	100177	03/18/26	FIELDSTONE LANDSCAPE SERVICES LLC	1723	Tree pruning Nov 2025	Landscape Maintenance - Other	546036-53908	\$3,225.00
001	100177	03/18/26	FIELDSTONE LANDSCAPE SERVICES LLC	27060	Landscape Maint Contract Jan 2026	Landscape Maintenance	546300-53908	\$9,049.45
001	100178	03/23/26	FIELDSTONE LANDSCAPE SERVICES LLC	27583	irrigation repairs main line well	Irrigation Repairs and Maintenance	546041-53908	\$557.39
001	100179	03/23/26	INFRAMARK LLC	1165858	Maintenance Service -installation of street sigs and polls	Miscellaneous Maintenance	546922-53908	\$1,500.00
001	100180	03/25/26	MCDIRMIT DAVIS & COMPANY, LLC	63280	Audit services March 2026	Auditing Services	532002-51301	\$6,000.00
001	100181	03/27/26	SPRING HILL SUITES MARRIOTT	032426-	Room Rental March 2026	Dues, Licenses & Fees	554020-51301	\$152.50
001	100182	03/27/26	STRALEY ROBIN VERICKER	28115	District Counsel March 2026	District Counsel	531146-51401	\$789.00
001	100183	03/27/26	STEADFAST ENVIRONMENTAL, LLC	SA-21762	Aquatic Maint Pond Spraying March 2026	Aquatic Contract	534067-53805	\$970.00
001	1206	03/05/26	SITE MASTERS OF FLORIDA LLC	022426-1	STORMWATER MAINT	Aquatic Contract	534067-53805	\$10,050.00
001	300328	03/02/26	DUKE ENERGY	021026-0899- ACH	DUKE ENERGY Feb 2026	Street Lights	543062-53100	\$1,496.59
001	300329	03/03/26	DUKE ENERGY	021026-2924- ACH	DUKE Energy Feb 2026	Electric Utility Services	543041-53100	\$30.80
001	300330	03/05/26	DUKE ENERGY	021326-5999- ACH	Duke Energy Feb 2026	Electric Utility Services	543041-53100	\$66.22
001	300331	03/20/26	PASCO COUNTY UTILITIES SERV ACH	24052539-ACH	water sewage JFeb 2026	Water Utility Services	543018-53600	\$11.00
001	300332	03/20/26	PASCO COUNTY UTILITIES SERV ACH	24052536-ACH	water sewage Jan 2026	Water Utility Services	543018-53600	\$11.00
001	300333	03/20/26	PASCO COUNTY UTILITIES SERV ACH	24052538-ACH	water sewage Jan 2026	Water Utility Services	543018-53600	\$11.00
001	300334	03/25/26	DUKE ENERGY	030426-1494-ACH	Duke energy March 2026	Electric Utility Services	543041-53100	\$64.54
001	300335	03/25/26	DUKE ENERGY	030426-1981-ACH	Duke Energy March 2026	Electric Utility Services	543041-53100	\$30.80
001	300336	03/25/26	DUKE ENERGY	030426-1220- ACH	Duke Energy March 2026	Electric Utility Services	543041-53100	\$33.25
001	300337	03/25/26	DUKE ENERGY	030426-2453-ACH	Duke energy March 2026	Electric Utility Services	543041-53100	\$30.80
001	300338	03/25/26	DUKE ENERGY	030426-7059-ACH	Duke Energy March 2026	Electric Utility Services	543041-53100	\$160.64
001	300339	03/25/26	DUKE ENERGY	030426-2148-ACH	Duke energy March 2026	Electric Utility Services	543041-53100	\$39.07
001	300340	03/25/26	DUKE ENERGY	030426-2304-ACH	Duke Energy March 2026	Electric Utility Services	543041-53100	\$30.80
001	300341	03/25/26	DUKE ENERGY	030426-1361-ACH	Duke Energy March 2026	Electric Utility Services	543041-53100	\$103.43
001	300342	03/25/26	DUKE ENERGY	030426-2776-ACH	Duke energy March 2026	Street Lights	543062-53100	\$650.36
001	300343	03/25/26	DUKE ENERGY	030426-2601-ACH	Duke Energy March 2026	Electric Utility Services	543041-53100	\$266.79
001	300344	03/25/26	DUKE ENERGY	030426-1056-ACH	Duke Energy March 2026	Electric Utility Services	543041-53100	\$58.29
001	300345	03/25/26	DUKE ENERGY	030426-0592-ACH	Duke energy March 2026	Electric Utility Services	543041-53100	\$49.70
001	300346	03/25/26	DUKE ENERGY	030426-0732-ACH	Duke energy March 2026	Electric Utility Services	543041-53100	\$30.80
001	300347	03/27/26	DUKE ENERGY	030626-1832-ACH	Duke Energy March 2026	Street Lights	543062-53100	\$2,078.67
001	300348	03/27/26	DUKE ENERGY	030626-1650-ACH	Duke energy March 2026	Street Lights	543062-53100	\$2,326.86
001	300349	03/31/26	DUKE ENERGY	031126-0899-ACH	Duke energy March 2026	Street Lights	543062-53100	\$1,496.53
001	DD260	03/13/26	ADR INC	030626-1870	enhanced payroll for supervisors	Payroll Services	549405-51301	\$23.00
<b>Fund Total</b>								<b>\$60,680.49</b>

<b>Total Checks Paid</b>	<b>\$60,680.49</b>
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