

Westchase Community Development District

Board of Supervisors

Matt Lewis, Chairman
Gregory Chesney, Vice Chairman
Christopher Barrett, Assistant Secretary
James Wimsatt, Assistant Secretary
Reggie Gillis, Assistant Secretary

Mark Vega, District Manager
Erin McCormick, Esq., District Counsel
Sherida Cook, Office Manager
David Sylvanowicz, Field Manager
Robert Dvorak, District Engineer

Workshop Agenda

Tuesday, October 21, 2025 – 6:30 p.m.

1. Call to Order
2. Audience Comments
3. Discussion with Hillsborough County Sherriff Officer
4. Discussion of Engineering Survey for Pond 120
5. Discussion of Road Reserve..... Page 2
6. Discussion of Proposals for Alley Repaving Project
7. Discussion of Camera Proposals
8. Discussion of Staff Pay Raises
9. Discussion of District Management Proposals
 - A.Inframark Proposal..... Page 26
 - B.Rizzetta & Company Proposal..... Page 47
 - C.Kai Management Proposal..... Page 78
10. Supervisors' Requests
11. Adjournment

District Office:
2005 Pan Am Circle, Suite 300
Tampa, Florida 33607

Meeting Location:
Maureen B. Gauzza Regional Library
11211 Countryway Blvd
Tampa, FL. 33626

WESTCHASE COMMUNITY DEVELOPMENT DISTRICT

PAVEMENT ASSESSMENT REPORT

Prepared for:
Westchase Community Development District

Prepared by:
Robert Dvorak, PE
Brletic Dvorak Inc.
436 4th Ave. S., Unit 4
St. Petersburg, FL 33701

February 2024

Contents

1.0 SUMMARY

2.0 RECOMMENDATIONS, COSTS, AND CONCLUSION

Appendices

APPENDIX A – PAVEMENT EXHIBIT

APPENDIX B – CONSTRUCTION COST ESTIMATE

1.0 SUMMARY

This report is meant to serve as an updated projection of anticipated construction costs related to milling and repaving roads throughout the Westchase CDD based on our previous investigation of the roadways, alleyways and drive aisles, owned and maintained by the Westchase CDD. The report also includes labeled location map, estimated costs for resurfacing updated for 2024 costs and a remaining life expectancy summary table updated based on the 2020 field review and roadway assessment.

Date of Review: February 27th, 2024

Performed By: Robert Dvorak, PE – BDi, Jerry Whited - BDi

2.0 RECOMMENDATIONS, COSTS, AND CONCLUSION

Recommendations: Based on the assessment of each roadway's condition level, it is recommended to mill and resurface the roadways the full depth of asphalt to gain the full life expectancy from the roadway. Note, other methods of construction such as asphalt overlay or microsurfacing are options to save cost but will result in a lesser service life. Standing water was previously observed in the miami curb due to inadequate slope. This condition will expedite pavement deterioration. The original construction elevations and slopes are the main factor in causing this condition and alleviation of the standing water may not be possible due to site constraints. It is our recommendation to evaluate these areas on a case by case basis when a particular section of the project is being planned and consider removal and replacement of the curb. All associated pavement markings would also need to be reinstalled. Thermoplastic pavement markings are recommended.

Optional Survey: As described in the existing conditions section of the report, various locations on several roadways have average to below average drainage conveyance. If the community desires to remedy the drainage issues given existing conditions and constraints, it is recommended to perform a road survey, and have construction plans prepared by a licensed engineer to aid in the implementation of a mill and resurfacing project.

Geotechnical Borings and Testing: Although minimal to no base issues were apparent through visual observation, if the community desires to gain reassurance that the limits of base remediation are found prior to the implementation of a mill and resurfacing project, it is recommended to contract with a geotechnical engineer to perform an analysis of the existing asphalt section via core borings throughout the community as well as confirming and testing of the limits of the base remediation during the project. Performing this recommended work would be the best way to limit change orders during a project.

Striping: All associated pavement markings would also need to be reinstalled. Thermoplastic pavement markings are recommended.

Estimate of Construction Costs: See Table 1 & Appendix B for the Construction Cost Estimates for the recommended future repairs.

Cost estimates are based on the costs for similar work on recent projects and FDOT Historical Unit Costs for the State of Florida dated June 2022 – May 2023.

The estimate of the construction costs is only an estimate and not a guaranteed maximum cost. The estimated cost is based on historical unit prices or current prices being experienced for on-going and similar items of work in Pasco County. The labor market, future costs of equipment and materials, and the actual construction process are all beyond our control. Due to this inherent possibility for fluctuation in costs, the total final cost may be more or less than the estimate.

The professional service for establishing the Construction Cost Estimate are consistent with the degree of care and skill exercised by members of the same profession under similar circumstances.

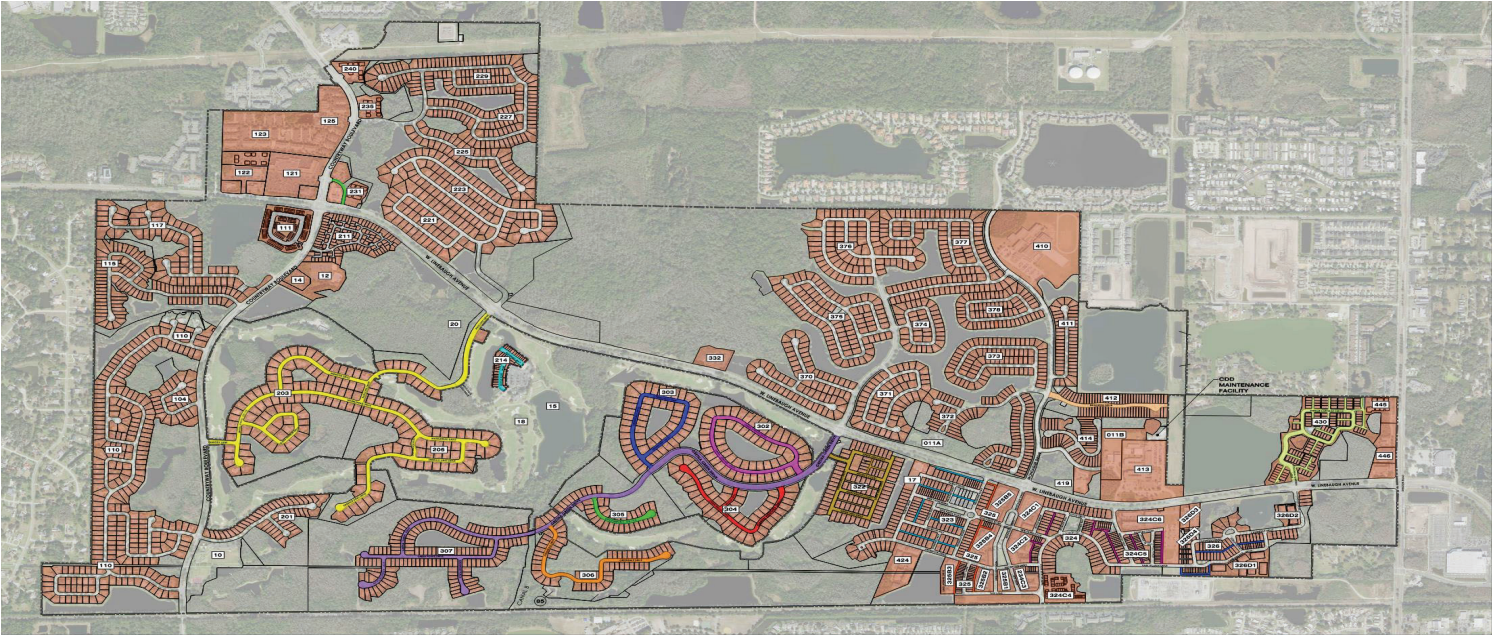
Table 1

ENGINEER'S ESTIMATE OF PROBABLE CONSTRUCTION COST			
Westchase CDD Owned Roadways/Alleyways			
Section	Estimated Total Cost (See Appendix B for Quantities & Breakdown)	Estimated Total Cost + Mobilization, MOT, & Contingency (20%)	Estimated Remaining Life Expectancy
203 & 205	\$819,744.00	\$983,692.80	1-3 years
214	\$49,743.00	\$59,691.60	5-7 years
231	\$25,322.00	\$30,386.40	9-12 years
302	\$187,216.00	\$224,659.20	7-9 years
303	\$162,234.00	\$194,680.80	5-7 years
304	\$164,593.00	\$197,511.60	12-15 years
305	\$73,821.00	\$88,585.20	7-9 years
306	\$170,074.00	\$204,088.80	5-7 years
307	\$626,787.00	\$752,144.40	5-9 years
322	\$297,182.00	\$356,618.40	5-9 years
323	\$73,465.00	\$88,158.00	5-9 years
324	\$72,304.00	\$86,764.80	3-5 years
325	\$58,417.00	\$70,100.40	2-5 years
326	\$34,444.00	\$41,332.80	7-9 years
412	\$105,761.00	\$126,913.20	7-9 years
430	\$344,582.00	\$413,498.40	9-12 years

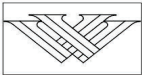
APPENDIX A

Pavement Exhibit

Project #19-00603-001



LEGEND			
 CDD BOUNDARY	 SECTION 203 & 205	 SECTION 214	 SECTION 231
	 SECTION 303	 SECTION 304	 SECTION 305
	 SECTION 307	 SECTION 322	 SECTION 323
	 SECTION 325	 SECTION 326	 SECTION 412
			 SECTION 302
			 SECTION 306
			 SECTION 324
			 SECTION 430



WESTCHASE COMMUNITY DEVELOPMENT
PAVEMENT ASSESSMENT MAP

APPENDIX B

Construction Cost Estimate

ENGINEER'S ESTIMATE OF PROBABLE CONSTRUCTION COST
WESTCHASE CDD

PROJECT DESCRIPTION:	PROJECT:	MILL AND RESURFACE
	MILL AND RESURFACE CDD ROADWAYS WITH ASSOCIATED RESTRPE OF PAVEMENT MARKINGS	
SPEC YEAR:		2024
SUBMITTAL TYPE:		Final Estimate
COUNTY:		Hillsborough
DATE:		February 27th, 2024
ENGINEERING CONSULTANT FIRM:		BDi Engineering
CONTACT NAME:		Robert Dvorak, PE
PHONE NUMBER:		813-361-1466
PAGE NUMBER:		1 of 17

COMPONENT GROUPS

SECTION 203 & 205		\$819,744
SECTION 214		\$49,743
SECTION 231		\$25,322
SECTION 302		\$187,216
SECTION 303		\$162,234
SECTION 304		\$164,593
SECTION 305		\$73,821
SECTION 306		\$170,074
SECTION 307		\$626,787
SECTION 322		\$297,182
SECTION 323		\$73,465
SECTION 324		\$72,304
SECTION 325		\$58,417
SECTION 326		\$34,444
SECTION 412		\$105,761
SECTION 430		\$344,582
COMPONENT SUB-TOTAL		\$3,265,688
MOT (Maintenance of Traffic)	5%	\$163,284
SUB-TOTAL		\$3,428,973
MOB (Mobilization)	10%	\$342,897
SUB-TOTAL		\$3,771,870
PU (Project Unknowns)	5%	\$188,594
SUB-TOTAL		\$3,960,464
Initial Contingency (Do Not Bid)	5%	\$198,023
PROJECT GRAND TOTAL		\$4,159,000

NOTES:

ENGINEER'S ESTIMATE OF PROBABLE CONSTRUCTION COST WESTCHASE CDD

PROJECT:	MILL AND RESURFACE
FILE VERSION:	EE_03-15_Rev23
PAGE NUMBER:	1 of 16

Section 203 & 205

[illegible]

ENGINEER'S ESTIMATE OF PROBABLE CONSTRUCTION COST WESTCHASE CDD

PROJECT:	MILL AND RESURFACE
FILE VERSION:	EE_03-15_Rev23
PAGE NUMBER:	2 of 16

Section 214

[illegible]

ENGINEER'S ESTIMATE OF PROBABLE CONSTRUCTION COST

WESTCHASE CDD

PROJECT:	MILL AND RESURFACE
FILE VERSION:	EE_03-15_Rev23
PAGE NUMBER:	3 of 16

Section 231

[illegible]

ENGINEER'S ESTIMATE OF PROBABLE CONSTRUCTION COST WESTCHASE CDD

PROJECT:	MILL AND RESURFACE
FILE VERSION:	EE_03-15_Rev23
PAGE NUMBER:	4 of 16

Section 302

[illegible]

ENGINEER'S ESTIMATE OF PROBABLE CONSTRUCTION COST WESTCHASE CDD

PROJECT:	MILL AND RESURFACE
FILE VERSION:	EE_03-15_Rev23
PAGE NUMBER:	5 of 16

Section 303

[illegible]

ENGINEER'S ESTIMATE OF PROBABLE CONSTRUCTION COST WESTCHASE CDD

PROJECT:	MILL AND RESURFACE
FILE VERSION:	EE_03-15_Rev23
PAGE NUMBER:	6 of 16

Section 304

[illegible]

ENGINEER'S ESTIMATE OF PROBABLE CONSTRUCTION COST WESTCHASE CDD

PROJECT:	MILL AND RESURFACE
FILE VERSION:	EE_03-15_Rev23
PAGE NUMBER:	7 of 16

Section 305

[illegible]

ENGINEER'S ESTIMATE OF PROBABLE CONSTRUCTION COST

WESTCHASE CDD

PROJECT:	MILL AND RESURFACE
FILE VERSION:	EE_03-15_Rev23
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Section 306

[illegible]

ENGINEER'S ESTIMATE OF PROBABLE CONSTRUCTION COST WESTCHASE CDD

PROJECT:	MILL AND RESURFACE
FILE VERSION:	EE_03-15_Rev23
PAGE NUMBER:	9 of 16

Section 307

[illegible]

ENGINEER'S ESTIMATE OF PROBABLE CONSTRUCTION COST WESTCHASE CDD

PROJECT:	MILL AND RESURFACE
FILE VERSION:	EE_03-15_Rev23
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Section 322

[illegible]

ENGINEER'S ESTIMATE OF PROBABLE CONSTRUCTION COST

WESTCHASE CDD

PROJECT:	MILL AND RESURFACE
FILE VERSION:	EE_03-15_Rev23
PAGE NUMBER:	11 of 16

Section 323

[illegible]

ENGINEER'S ESTIMATE OF PROBABLE CONSTRUCTION COST WESTCHASE CDD

PROJECT:	MILL AND RESURFACE
FILE VERSION:	EE_03-15_Rev23
PAGE NUMBER:	12 of 16

Section 324

[illegible]

ENGINEER'S ESTIMATE OF PROBABLE CONSTRUCTION COST WESTCHASE CDD

PROJECT:	MILL AND RESURFACE
FILE VERSION:	EE_03-15_Rev23
PAGE NUMBER:	13 of 16

Section 325

[illegible]

ENGINEER'S ESTIMATE OF PROBABLE CONSTRUCTION COST

WESTCHASE CDD

PROJECT:	MILL AND RESURFACE
FILE VERSION:	EE_03-15_Rev23
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Section 326

[illegible]

ENGINEER'S ESTIMATE OF PROBABLE CONSTRUCTION COST WESTCHASE CDD

PROJECT:	MILL AND RESURFACE
FILE VERSION:	EE_03-15_Rev23
PAGE NUMBER:	15 of 16

Section 412

[illegible]

ENGINEER'S ESTIMATE OF PROBABLE CONSTRUCTION COST WESTCHASE CDD

PROJECT:	MILL AND RESURFACE
FILE VERSION:	EE_03-15_Rev23
PAGE NUMBER:	16 of 16

Section 430

[illegible]



**Westchase Community
Development District**
Proposal – District Management Services
2025



Re: Proposal for Westchase 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 Westchase CDD. It has been our honor to serve your community for the last 35 years and we are committed to continue service with excellence.

Our Mission is: “To protect and replenish the world’s most critical resources through sustainable infrastructure.” We do this through our principles of CLEAR Partnership (Collaboration, Leadership, Excellence, Accountability, and Respect).

We strongly believe in our people and ability to exceed our client’s 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 while serving your community for 35 years.
 - We provide service to around 145+ CDDs and 3 Municipalities throughout Florida.
 - 18 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 by an Inframark employee who is a Certified Project Manager (PMP). This designation requires recertification every 3 years.
- **Cost Savings:** We will review your current operating budget to identify savings opportunities or more efficient ways to operate the district.

- **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 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



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Executive Summary

Inframark Community Management Services is pleased to provide this proposal for district 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, experienced and local District Manager out of our Tampa 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 200 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 98.6%.
- **Capital Project Management:** Inframark has a Certified Project Manager (PMP) who has the knowledge and experience 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 clients. They are located in Tampa, Brandon, Wesley Chapel, Celebration, St. Augustine and Coral Springs.
- **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.

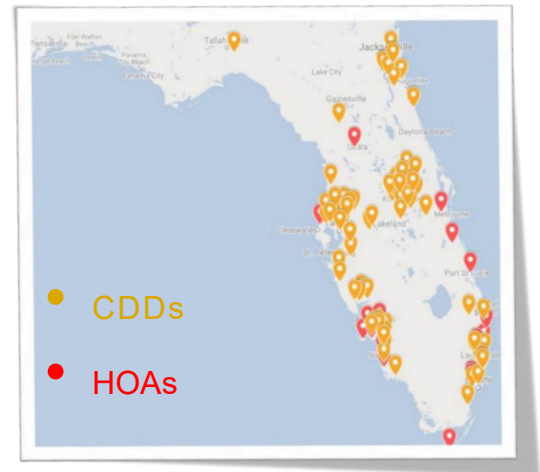
A complete range of Field Management and Maintenance services including but not limited to:

- 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

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 450 association partners, and over 145 Community Development Districts, and has offices throughout the State of Florida in Wesley Chapel, Tampa, St. Augustine, Celebration, Ft. Myers, and Coral Springs.

Inframark maintains a focus on serving CDDs and HOAs, and as a result, has become a leader in our industry, managing over \$300M 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*

Clients – References

Two Rivers

Two Rivers is a master-planned community of more than 6,000 planned residential homes, townhomes, apartments, and villas located North of Tampa that is 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 as 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.

REFERENCES

1. Celebration CDD
Tom Touzin, Chairman
Email: tom.touzin@celebrationcdd.org
2. Heritage Isles CDD
Dan Barravecchio, Chairman
Email: Dan.barravecchio@gmail.com
3. Arbor Greene CDD
Steve Eckhardt, Chairman
Email: Steve.eckhardt@arborgreene.com
4. Rivington CDD and Enterprise CDD
Kimberly Locher, Chairman
Email: kimberly@readercommunities.com
5. Harbour Isles CDD
Betty Fantauzzi, Chairman
Phone: (518) 727-5847

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

Pricing & Business Considerations

Pricing Category	Proposed Pricing	2025 Budget
District Management Services (Includes Admin, Recording, Revenue Collections and Accounting services)	\$ 115,000	\$ 126,683
Assessment Roll Services	\$ Included	\$ Included
Total	\$ 115,000	\$ 126,683

- Pricing is good for 30 days and is contingent upon a mutually agreed contract.
- Proposed pricing represents a savings of 9.2%
- Inframark is also willing to offer a 1-month base fee loyalty credit in 2025.

Good Evening Angel and Jennifer,

I wanted to take a moment to provide a brief update and, more importantly, to express my heartfelt gratitude for the incredible work Kristee has done for our District.

I understand that any change in management comes with its share of challenges. From my many conversations with Kristee, it's clear that the transition involving Breeze/HiKai was far from seamless — which, frankly, wasn't unexpected. Yet despite those hurdles, Kristee remained focused and committed, giving our District her full attention and energy.

She has already started building strong rapport with residents, demonstrating compassion, deep knowledge, and exceptional communication skills. Most notably, she has become my most valued ally in navigating the complexities of managing this District — a partnership I truly needed and deeply appreciate.

What stands out even more is that she accomplished all of this while in a transitional role — not one of full control — which speaks volumes about her work ethic and the pride she takes in what she does.

Kristee has represented the Inframark brand exceptionally well. On behalf of the Epperson Ranch II CDD and myself personally, thank you for assigning such a dedicated and capable manager to our community.

Sincerely,

Joe "Murph" Murphy

Epperson Ranch II CDD, Chairman

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.

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 eighteen (18) District Managers throughout the State of Florida with over 130 years of District Management experience in the Florida Community Development District market. The Southwest Regional Director for Inframark has over eleven (11) years of District Management experience. 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:

- 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.

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.

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

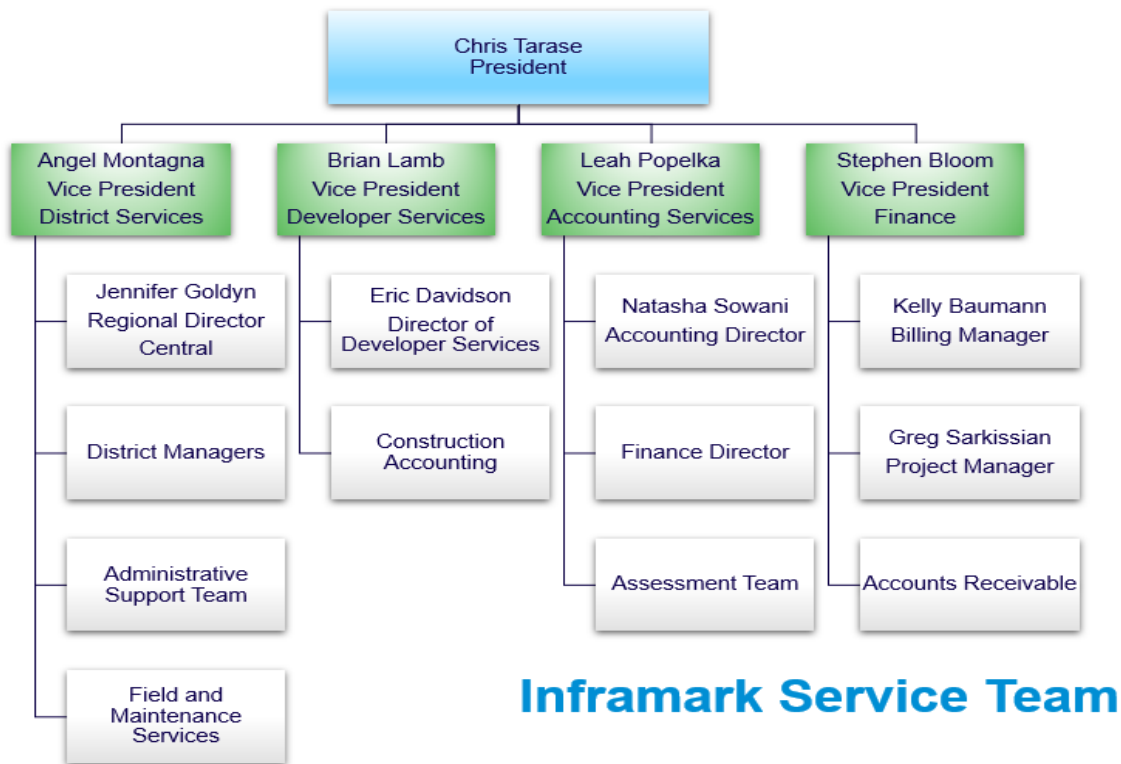
- ADP is an industry leader in Payroll, HR, and Tax solutions with over 75 years in the industry and 1,000,000 companies currently using ADP solutions.
- Allows for seamless payroll processing including direct deposit, physical paychecks, W-2, etc.
- Employee and manager self-service portal online and 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

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.

District Management:

Mark Vega, Senior District Manager, has over sixteen years of District Management experience. He will be the primary District Manager assigned to your District. He has been a District Manager in the Tampa Region for the past twelve years and has managed many complex Districts. Mark is driven by his attention to detail and by providing excellence in service to all districts that he manages. He has over sixteen years of CDD experience as he was the first resident Board Supervisor on the South Fork CDD and shortly after being appointed by the developer was selected as Chairman. He has a Bachelor of Arts Degree in Political Science from the University of South Florida. He is also a Certified District Manager as awarded through Florida Association of Special Districts.

Admin/Recording Services:

Mona Slaughter, Administration Supervisor, has over 20 years of experience providing services to special districts throughout Florida, including water control and improvement districts with experience in processing permits. In addition, she has experience as a Records Management Liaison Officer overseeing the maintenance of public records and responding to public records requests; and over 4 years' experience serving as a municipal clerk.

Janice Swade, Recording Secretary, has been working with Inframark for 20 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:

Cori Millonig, Accounts Payable Specialist, has been with Inframark since 2006 working closely with vendors, field managers, District Managers, City Managers and accountants. Lori has 20 years of extensive experience working in the accounting and customer service field. Lori is proficient in the accounts payable process, processing over 7,000 invoices annually.

Leah Popelka, Vice President of Accounting and Finance, has over 20 years of accounting and finance experience in the banking, utilities, real estate development, and district management sectors. Leah has experience as Director of Finance for an asset management and advisory firm specializing in real estate acquisitions and municipal financing. She began her career as a staff accountant at a CPA firm, which laid the foundation for opportunities to work for Fortune 500 companies in banking and utilities. Leah has developed a unique understanding of all financial elements of the real estate industry. She is presently leading Inframark's Finance and Accounting Department and has created a team of successful professionals that are consistently elevating service levels for our client base.

Helena Schneider, CPA, Accounting Supervisor, has 20 years of experience providing accounting services to community development districts throughout Florida. She is a Certified Public Accountant, holds a master's degree in business administration and dual bachelor's degrees in accounting and molecular biology. Helena is responsible for overseeing an accounting team, reviewing financial statements, budgets and coordinating the audit process with external firms.

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.

Management Services

The District Manager will serve as the District Manager pursuant to Florida Statute 190.007(1), perform the statutory duties, and perform comprehensive professional management services, in accordance with the requirements of Chapter 190, Florida Statutes, and all other applicable statutes, regulations, and policies, including, but not limited to, the requirements and guidance set forth in the Florida Special District Handbook, published for the Florida Attorney General's Office:

- 1.1 Prepare for and participate in Board meetings and take follow up actions. Provide (during meetings and through other communications) expert professional advice to the Board and its Committees on all substantive and procedural management issues and the application of government regulatory requirements.
- 1.2 Take actions to timely comply with regulatory laws governing Community Development Districts, such as (a) prepare and file various disclosure statements, (b) prepare and file budgetary public hearing notices and budgetary disseminating documents, (c) prepare budget and assessment resolutions, and (d) when requested, prepare specifications and bid documents and manage the competitive bidding process for various professional, construction and maintenance services. Services may include research, document drafting, and coordination of staff and consultants. Design systems and take actions with staff to operate, maintain and enhance community infrastructure and amenities. Serve as a liaison with County and State agencies, including the Supervisor of Elections, Taxing Officials and the Department of Community Affairs.
- 1.3 By April 1st of each year, prepare and distribute a proposed budget for the next year. This budget will include the following information:
 - a. The prior year's financial balances
 - b. Current year budget
 - c. The year to date balances
 - d. Projected balances for the remaining months (based on current trends and other knowledge)
 - e. Final current year projected ending balances (c. + d., above)
 - f. Draft budget based on current trends and other knowledge

- 1.4 By December 1st of each year, the accounts of the DISTRICTS, and the accountant(s) performing services for the DISTRICTS, must be audit ready.
- 1.5 Communicate with staff, officials, professionals, landowners and members of the public regarding district structure, function, policies, records requests, and other matters.
- 1.6 Develop and Implement Disaster Recovery Standards for the Manager and the DISTRICTS that will allow for continued services to the DISTRICTS in the event of a situation that interrupts their operations or business processes.
- 1.6.5. Update and Manage field level disaster recovery standards.
- 1.7 Manage and Supervise the Contractual Relationships of the Districts with Third Parties, including by not limited to the landscape maintenance company.
- 1.8 Manage and Supervise the Projects undertaken by the DISTRICTS, such as any Capital Improvement Projects.
- 1.9 Manage and Supervise DISTRICTS staff, including but not limited to, conducting periodic employment reviews, salary and benefit administration, setting performance standards and measurements.
- 1.10 Develop, monitor and refine written goals and objectives for the DISTRICTS, based on input by the Boards of Supervisors of the DISTRICTS. Translate these goals and objectives into an Annual Work Plan for the DISTRICTS, and provide the DISTRICTS with Quarterly Reports.

Records Administration Services

The District Manager will serve as the Official Records Custodian and will provide professional district records administration including:

- 2.1 Prepare legal notices and advertisements for Board meetings, workshops, special public hearings and committee meetings in accordance with Florida law. Prepare and distribute agendas and meeting packets.
- 2.2 A minimum of one week prior to next Board of Supervisors meeting, transcribe and distribute official minutes in summary form. If the DISTRICTS, in their sole discretion, elect to utilize a court reporter, and have the court reporter prepare a verbatim transcript of the meetings, then the obligation to transcribe the minutes shall be excluded from the Scope of Services to be performed by the MANAGER.
- 2.3 On a monthly basis, a minimum of one week prior to each Board of Supervisors meeting, prepare and distribute month end closed accrual based actual financial statements, which include actuals versus budget, for the District.



- 2.4 Forty-five (45) days prior to April 1st of each year, prepare and distribute audited financial statements for the DISTRICTS; provided that the preparation of the audited financial statements is not delayed by the audit firm.
- 2.5 Manage, organize, maintain and archive the official records in accordance with relevant law; and file relevant records and reports with government agencies.
- 2.6 Communicate with government, auditor, accountant, landowner and public requests for records information and take appropriate actions.
- 2.7 Manage a District website in accordance with all relevant law.

Special Assessment Services

The District Manager will provide professional assessment management services in accordance with Florida law governing the uniform method of assessing, levying and collecting special assessments. The work includes:

- 3.1 Prepare and refine a property database. Prepare and calculate an assessment roll for all funds and submit it to County taxing officials for annual assessment and collection of non ad valorem assessment revenues. Answer Board, staff, trustee, dissemination agent, landowner and auditor questions regarding special assessments.
- 3.2 Prepare annual debt service fund budgets. Work with taxing officials and district accountant to assure correct application of revenues and proper routing of payments to the trustee to assure proper bond debt payoffs. Track and account for debt service payments and prepayments and process debt lien releases. Answer Board, staff, trustee, dissemination agent, landowner and auditor questions regarding debt payoffs.
- 3.3 Annually evaluate and provide recommendations concerning the Assessment Methodology utilized by the DISTRICT for calculating operations and maintenance assessment for District landowners.



Rizzetta & Company
Professionals in Community Management



PROPOSAL

Westchase Community Development District

Prepared for: Board of Supervisors

REGIONAL OFFICE

5020 W Linebaugh Avenue, Suite 200

Tampa, FL 33624

813.933.5571 | rizzetta.com



FIRSTLY

THANK YOU

FOR CONSIDERING US!



Rizzetta & Company
Professionals in Community Management

August 21, 2025

Erin McCormick, Esq.
District Counsel
Westchase CDD

RE: Community Development District Management Services

Dear Erin,

Rizzetta & Company appreciates the opportunity to present our qualifications to serve as the District Manager for the Westchase Community Development District. We have included information that demonstrates our ability to provide exceptional service and meet the district's needs.

As a leading provider of district management services, we possess a unique understanding of the complexities involved in managing a community development district. With over 39 years of experience, a statewide presence, and a team of highly qualified district services professionals, we are well-prepared to handle current and future projects, ensuring that the transition and daily operations run smoothly.

Thank you for your time and consideration of our qualifications. 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

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 39 years in the industry, Rizzetta & Company, is staffed with highly experienced managers and support staff. Each of our eight 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

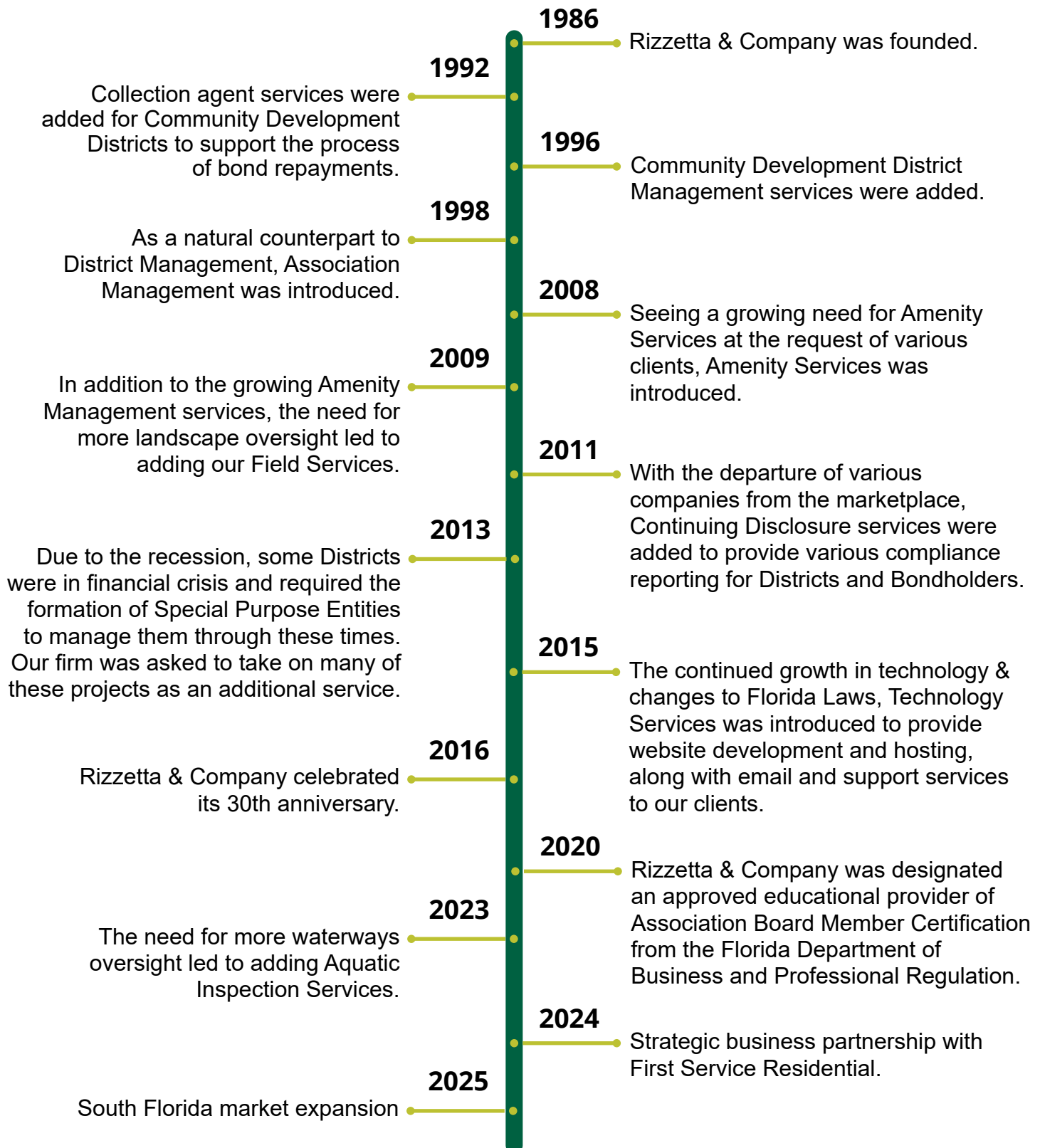


HEADQUARTERS

3434 Colwell Avenue, Suite 200
Tampa, FL 33614



OUR MILESTONES





BY THE NUMBERS

39 

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

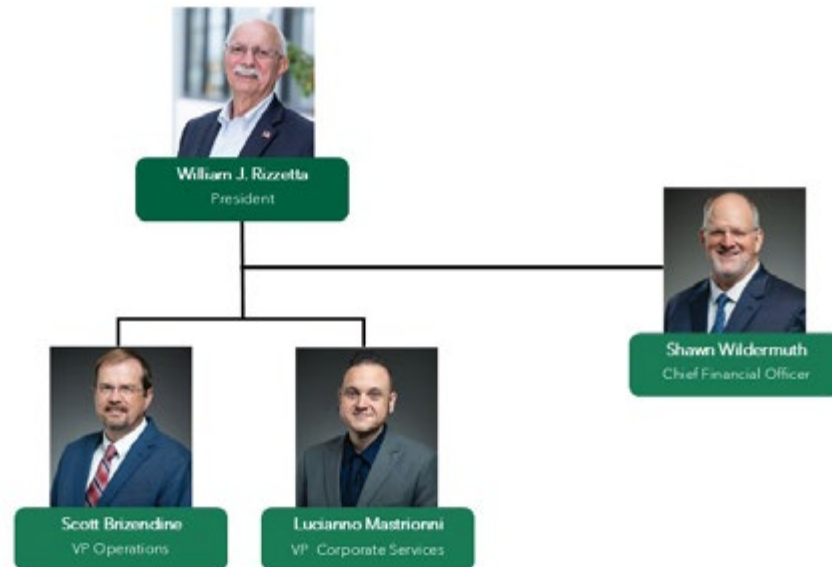


DISTRICT
SERVICES TEAM
MEMBERS





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 Westchase 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.

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.

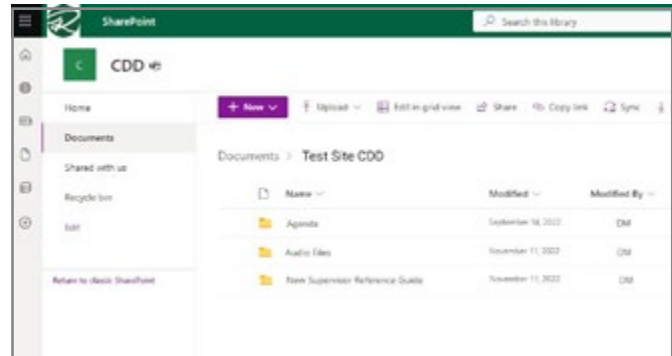




Document Management System

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

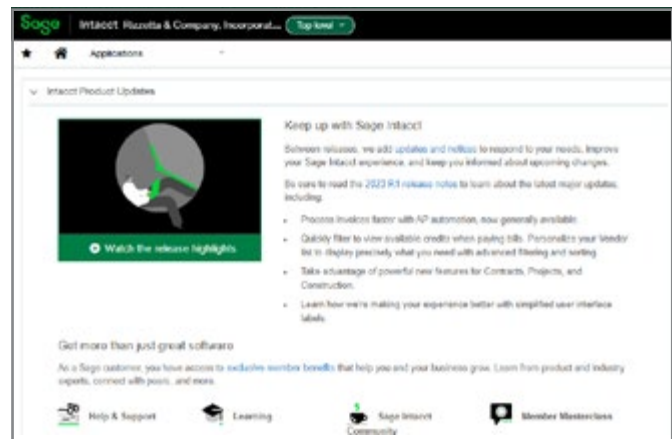


Customize your site to streamline your District's work. Accelerate productivity by transforming processes—from simple tasks like notifications and approvals to complex operational workflows.

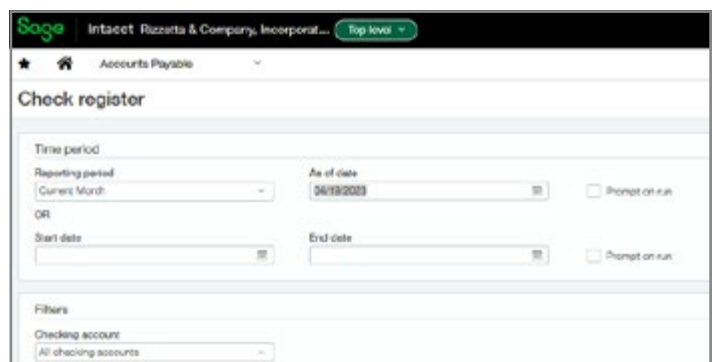
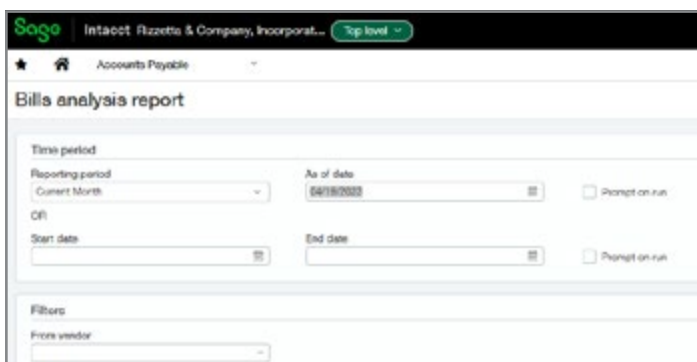
Financial Management Software

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	Budget	Fees
District Management 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)	\$128,683	\$57,600
Administrative Services Provide Minutes for All Meetings and Workshops. Public Records Repository. Preparation of 14-day Tentative and 7-day Final Agendas.	-	\$9,600
District Accounting 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.	-	\$46,800
Annual Financial and Revenue Collections Estoppel Issuance. Debt Management		\$6,000
Assessment Roll Administration Prepare Annual Assessment Rolls and Submit to County Tax Collectors and Property Appraisers. Create and Maintain the Assessment Rolls	-	\$5,000
Technology Services Website Compliance Monitoring and Monthly Content Uploads	-	Included
TOTAL	\$128,683	\$125,000



MEET THE CDD

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.



**Scott
Brizendine**

Vice President of Operations

Scott Brizendine is our Vice Present of Operations, Community Development Districts. His responsibilities include the oversight of all operations associated with Rizzetta's district services department including management, administration, accounting, financial and dissemination services. Most recently, Scott 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 100+ 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 most recently he 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.



**Matt
Huber**

Regional District Manager

Matthew Huber is our Regional District Manager and oversees the management team in our Tampa Bay market, with offices in Tampa, Wesley Chapel, and Riverview. He was named to the position in August of 2020. He currently is 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 gained 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.



**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 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 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.



**Lucianno
Mastrionni**

Luciano Mastrionni is Rizzetta & Company's Vice President of Corporate Services. Lucianno oversees and supports the company's strategic planning processes, development, operations leadership, talent expansion and retention, oversight, and growth. Lucianno also oversees the leadership team of the Community Services Division, comprised of the Amenity Services, Landscaping Inspection Services and Aquatics Services. Additionally, he oversees Rizzetta's Business Development, Marketing, Information Technology, and Human Resources Management teams. In these capacities, Lucianno oversees functions, focusing on planning, development, and delivery of all programs, and services.

Before joining our team, Lucianno served in hotel general management and asset management for hotel ownership companies including Hilton, Marriott, and IHG hotels, and worked in guest service operations management for The Walt Disney Company for over a decade. Most recently Lucianno served in corporate Hotel Management, overseeing new hotel builds, and Task Force General Management oversight, recovering distressed properties for an array of major hotel ownership companies across the United States. Lucianno holds his Bachelor of Science in Aeronautics from Embry Riddle Aeronautical University and maintains his Commercial Pilots License with numerous ratings and certifications.



**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 —
SERVICES
— 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.



FIELD MANAGEMENT SERVICES

Our Field Management Service team is committed to preserving and enhancing the community landscape with detailed inspections, formal reporting, enhancement planning, and effective vendor communication strategies.

- **Landscape Design & Planning:** Our in-house landscape designer creates community-specific plans that meet city codes and Florida-friendly guidelines. Designs focus on curb appeal, water efficiency, and long-term sustainability. Proper planning helps avoid costly rework and supports board decision-making.
- **Irrigation & Landscape RFP Management:** We develop clear and detailed scopes of work, evaluate bids, and assist in selecting vendors to guarantee fair and competitive pricing. Our process helps boards avoid vague proposals and select vendors with a proven track record of performance. This approach ensures compliance with Florida standards and promotes long-term success.
- **Maintenance Inspections & Board Reporting:** Monthly or bi-monthly site visits track landscape conditions and contractor performance. Reports are clear, photo-documented, and designed to help boards make informed decisions. We also attend board meetings to present findings and recommend next steps.
- **Turnover Inspections (CO & Developer Transitions):** We inspect landscaping during developer-to-HOA transitions to verify compliance with original plans and quality standards. Our reports document deficiencies for warranty claims or corrections. Florida law often requires this inspection to protect the association.
- **Master Planning for Mature Communities:** We guide large-scale landscape upgrades with phased master plans tailored to aging communities. Most landscapes need renewal every 10–15 years to stay attractive and functional. Our plans help boards prioritize, budget, and implement improvements strategically.
- **Aquatic Management Services:** Our licensed aquatic specialists manage ponds, lakes, and fountains per Florida state regulations. We monitor water quality and control invasive weeds to prevent code violations and algae blooms. Clean waterways boost aesthetics, safety, and ecosystem balance.
- **ISA Certified Arborist Services:** We have a certified arborist on staff who handles tree inventories, health assessments, permits, and mitigation plans. Arborist documentation is legally required for many removals and helps communities avoid fines. All tree work follows ANSI A300 and ISA safety standards.



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 **Westchase 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

Marc Carlton, Chair

Triple Creek CDD

E: boardmember1@triplecreekcdd.org

W: triplecreekcdd.org

Daniel Smith, Chair

Covington Park CDD

E: sbrown@covingtonparkcdd.org

W: covingtonparkcdd.org

TJ Pyche – Chair

Waterset North CDD

E: tpyche@watersetnorthcdd.org

tpyche@outlook.com

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Debra Johnson – Vice Chair

Paseo CDD

E: seat2@paseocdd.org

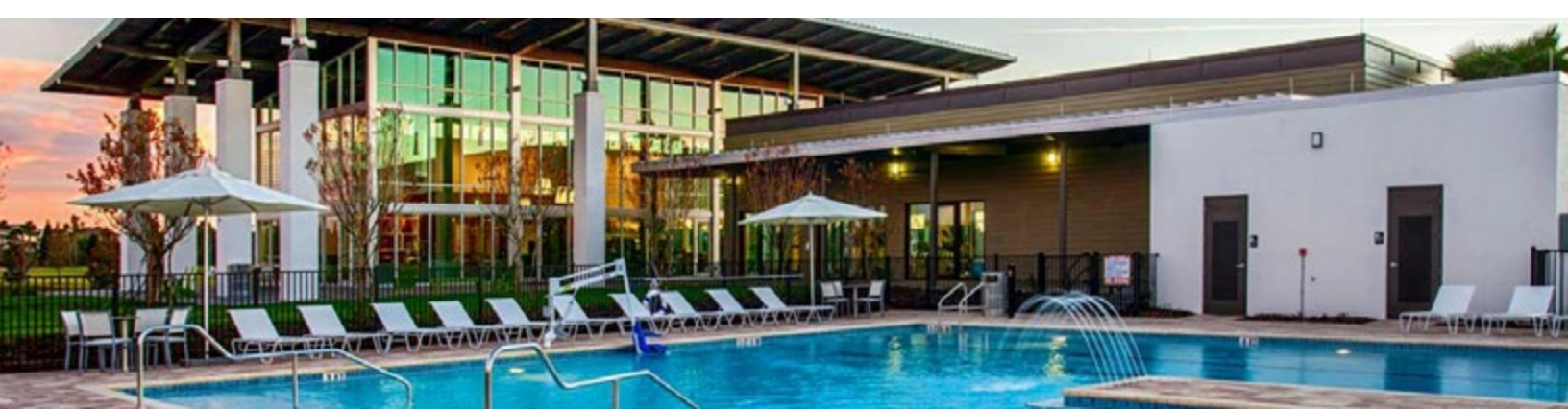
W: paseocdd.org

Stanley Haupt – Chair

The Verandahs CDD

E: shaupt.cdd@gmail.com

W: theverandahscdd.org





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

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, **Westchase CDD**, to a new approach to community management—**reinvented, reimaged, & uniquely designed for you.**





Westchase CDD

August 22, 2025

Kai is excited to submit our proposal to provide District Management Services for the Westchase Community Development District. With extensive experience in CDD management, our team is committed to delivering smooth, reliable service that meets your operational, financial, and regulatory needs.

We are a process-driven, boutique firm that takes the time to understand each District's priorities and deliver personal service tailored to those needs. Our approach is not one-size-fits-all—we focus on details, listen closely, and provide solutions that feel as personal as they are professional.

Our expertise in accounting and financial management sets us apart. From budgeting and assessments to audits, variance analysis, and long-term planning, we provide Boards with clear, actionable insights. Leveraging advanced technology, we streamline bill payments, simplify reporting, and give real-time visibility into your District's financial health. We tailor our approach to fit each Board's priorities while staying fully aligned with statutory requirements.

Our focus on accountability, clarity, and proactive communication ensures that Supervisors and residents alike have confidence in the management of District finances. Transitions can be complex, but we make them seamless. We are pleased to propose Heather Dilley as District Manager, bringing the expertise and leadership needed to ensure a smooth transition and long-term success.

At Kai, we believe in continuous improvement and putting our clients first—especially when it comes to keeping finances organized, transparent, and strategically managed. By combining a proven process with personal attention, we are confident in our ability to provide thoughtful oversight, practical solutions, and lasting value for Westchase CDD.

Thank you for considering our proposal. We look forward to the opportunity to discuss how we can support your District and answer any questions you may have.

Kind regards,
Kraig Carmickle

Executive Team

Meet the Collective

Kraig Carmickle, Managing Director



Kraig brings over 15 years of leadership experience in community and property management, with a strong background in scaling operations, building board relationships, and leading high-performing teams. Prior to joining Kai, he served as CEO of a national management firm overseeing more than 600 employees and specializing in homebuilding and land development communities.

Kraig's executive experience has shaped his strategic, growth-minded approach to community management—grounded in partnership, service excellence, and long-term value for residents and developers alike.

Lauren Parsons, Vice President



Lauren brings over a decade of progressive experience in community management, specializing in CDD's, HOA's, and developer partnerships. She has played a key role in creating, transitioning, and maintaining communities, guiding Boards and developers through every stage of development and long-term operations.

Known for her strategic oversight, transparent communication, and results-driven leadership, Lauren consistently dependable guidance and long-term value. Her ability to balance priorities while ensuring operational excellence makes her a trusted partner in shaping communities.

Kristen Gomez, 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.

District Management Team

Meet the Collective

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 and developers alike.

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.

Heather Dilley, Proposed District Manager



Heather is a seasoned Community Development District Manager with more than 15 years of experience in Florida community management. She is recognized for her expertise in financial oversight, budgeting, and strategic planning, as well as her ability to communicate clearly with Boards and residents. Holding a Bachelor of Science in International Business and a Project Management Professional (PMP®) certification, Heather brings strong leadership and organizational skills to every district she serves, including some of the area's most notable communities such as K-Bar Ranch and Union Park.

Financial Experience

At Kai, we combine forward-thinking technology with decades of financial expertise to deliver a frictionless, fully accountable financial management experience.

Meet Our Finance Leaders

Kerri Robertson – Director of Treasury & Finance



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.

Elizabeth Moore – Financial Strategy & Budget 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.

Financial Precision, Operational Transparency

The CDD Experience

Community Development Districts

District Management

Kai's District Management team prioritizes ethics, accountability, and efficiency, building trust with both residents and Supervisors. Our experienced managers are well-versed in Florida Statutes and work closely with Boards to develop balanced budgets that address current needs while planning for future growth.

Accounting & Financial Reporting

Kai provides comprehensive financial management, with accurate reporting, variance analysis, and strategic planning to support Board decisions. Leveraging tools like AvidXchange, we streamline bill payments and provide paperless options, real-time invoice tracking, and customizable dashboards to Supervisors to enhance efficiency visibility.

Vendor & Contract Management

We manage vendor relationships, oversee contracts, and monitor performance to ensure the District receives maximum value while relieving the Board of operational burden.

Budgeting & Long-Term Growth Planning

We help Districts navigate budgeting challenges, particularly for aging infrastructure and expanding community needs. Partnering with the Board, Kai delivers innovative, sustainable solutions and well thought out strategies that suits the districts needs.

Regulatory Compliance and Risk Management

We actively monitor statutory obligations, insurance coverage, and operational risks to support the Board in maintaining compliance and mitigating potential legal and financial exposures.

Strategic Consulting and Customized Solutions

In addition to routine management, Kai collaborates with Boards to address specialized challenges—ranging from infrastructure planning and community development to refinancing initiatives—providing tailored strategies that advance the District's long-term objectives and success.

Assessments & Roll Certifications

With over a decade of experience, Kai manages all aspects of assessments, including annual roll certification, collections, and coordination with trustees, title companies, and stakeholders. We integrate assessments seamlessly into budgets, presenting easy and understandable information to residents.

Records Custodian & Administration

Our records team ensures all District documents—minutes, resolutions, contracts, and public records—are properly maintained, ADA-compliant, and accessible. This role is critical to compliance, accountability, and public trust.

Financial Management

Why Kai?

With a team of experienced financial analysts, accountants, and district managers, Kai delivers precise financial assessments, efficient bond administration, and strategic refinancing solutions. Our expertise supports the financial stability of districts while fostering long-term success for the communities they serve.

Kai Financial & Bond Management

Kai provides comprehensive financial management services for Community Development Districts (CDDs), with a focus on:

- Preparing estoppel letters with accuracy and timeliness
- Managing bond issuances and refinancing processes
- Overseeing debt service and ensuring timely payments
- Delivering transparent and compliant financial reporting
- Supporting fiscal responsibility and long-term financial health

Bond Administration

- Issuance & Refinancing – Structure and coordinate bond sales, prepare methodology and cost reports, and identify refinance opportunities to lower debt service costs. *In the past five years, Kai has managed a total bond issuance of **\$445,450,000**.*
- Debt Service Management – Billing, collections, and allocation of assessments to ensure on-time principal and interest payments.
- Trustee Oversight – Process trustee invoices, remit payments, and maintain compliance with bondholder obligations.

Treasury Services

Kai's Treasury Services team is responsible for the active management and safeguard of District funds, investments, and banking relationships across Florida. The team's primary objective is to safeguard public revenues while ensuring the consistent availability of funds to meet operational needs and fulfill debt obligations.

Through specialized expertise and the strategic use of economies of scale, the team secures advantageous banking arrangements, reduces service-related costs, and enhances the financial flexibility of the Districts it serves. By aligning industry best practices in treasury management with the distinctive framework of Community Development Districts (CDDs), Kai delivers accurate financial reporting, robust asset protection, and meaningful support to Boards in pursuit of long-term fiscal stability.

Renowned for their strategic acumen and operational excellence, the team provides trusted leadership that strengthens the confidence of Boards, auditors, and other key stakeholders.

Capital Program Administration

Planning for the future is as important as managing today. Each year, Kai partners with District Staff and CDD Engineer to evaluate potential capital projects, looking at timing, costs, and long-term impacts on operations. By integrating capital planning with reserve studies and maintenance budgets, we help Boards weigh both immediate needs and lifecycle costs before committing to new investments.

Our team also brings significant experience in bond financing and loan programs. We regularly work with underwriters, financial advisors, and lenders to structure funding solutions for District improvements. With proven procedures and a strong track record of meeting compliance deadlines, Kai has built a reputation for effectively guiding Districts through complex financing programs.

Financial Management

Assessments and Revenue Collection

Kai has a strong history of managing assessment rolls and revenue collection for Districts of all sizes. We handle both on-roll and off-roll collections, coordinate closely with District Counsel when legal support is needed, and conduct routine true-up reviews to ensure collections stay accurate. Our team also provides estoppel letters at no additional cost to the District.

By combining technical expertise with careful review of developer agreements, we help maximize cash flow and maintain financial stability for the District. Our focus is on efficiency, accuracy, and ensuring that communities have the resources they need to operate smoothly.

Board Payroll System – Engage PEO

- **Timely, Accurate Payroll** – Engage PEO ensures Supervisor payroll is processed twice monthly, aligning with board meeting schedules and eliminating the risk of missed or delayed payments.
- **Compliance & Reliability** – As an IRS-Certified and ESAC-accredited provider, Engage delivers secure payroll processing, tax filings, and reporting with full legal compliance.

Streamlined Technology – A cloud-based platform with self-service access and robust reporting makes payroll simple, transparent, and efficient for both Supervisors and administrators.

Audits

Kai's experienced team specializes in accounting and audit support tailored specifically for Community Development Districts and other special districts. We work closely with independent auditors to ensure every audit is fully compliant with GAAP and state regulatory requirements. Our accounting systems are purpose-built for special districts, providing Boards with accurate, transparent, and easy-to-understand financial information. With a strong focus on reliability, accountability, and timely delivery, we help ensure a smooth and confident audit process year after year.

Budgeting

At Kai, budgeting is a collaborative process. Using specialized financial tools tailored to CDDs, we prepare monthly reports and annual budgets that align with each Board's priorities. District Managers work directly with our accounting team to develop draft budgets that reflect the community's goals for the upcoming year.

We provide Boards with a clear picture of anticipated revenue, planned expenses, and how those choices will impact residents. Throughout the process, we coordinate with District Staff, CDD Engineer, and Attorneys to ensure that operational and maintenance needs are appropriately accounted for, and that all required public notices are handled correctly. Every budget is reviewed from multiple perspectives, helping Boards make informed decisions with confidence.

Financial & Assessment Services

- **Assessment Roll Preparation** – Verify ownership, lot sizes, and allocations; prepare annual assessment rolls for county submission.
- **Tax Roll Administration** – Place CDD assessments on county rolls, reconcile with tax collector payments, and allocate funds between Debt Service and Operations & Maintenance (O&M).
- **TRIM Compliance** – Prepare DR-421 certifications and ensure adherence to county deadlines.

Reporting & Compliance

- **State Reporting** – File all required Florida reports by statutory deadlines.
- **Financial Transparency** – Maintain Excel-based allocation and tracking tables for clear, auditable records.
- **Estoppel Services** – Respond within 3 business days, confirm prepayments, manage on/off-tax roll estoppels, and ensure accurate closings.



Redefine Finance & Accounting

AUTOMATED PAYMENTS.
REAL-TIME REPORTING.
SEAMLESS INTEGRATION.

BUILT FOR EFFICIENCY AT SCALE

AvidXchange is a leading AP automation platform that streamlines financial workflows for growing cFaster Processing: Automated workflows speed up invoice approvals and payments.

Transparency: Full digital audit trails for clear accountability.

Security: Prevents lost, duplicate, or unauthorized payments.

Cost Savings: Cuts paper, mailing, and admin errors.

Compliance: GAAP-ready and audit-friendly.

Board Confidence: Real-time visibility into financial activity.



At Kai, we utilize AvidXchange AP software to ensure every District we manage benefits from streamlined accounts payable processes. Strongroom is purpose-built for CDDs and HOAs.

AvidXchange is more than just software—it's a safeguard for your community's finances. By combining efficiency with security and transparency, it ensures that every dollar is properly managed, accounted for, and reported with confidence.



Field Services & Amenity Management

We solve problems, before you know they exist

While we understand field services are not being requested, Kai offers strong expertise in maintenance, vendor oversight, and asset care, and we are available as a resource should the District ever need support.

Proactive Maintenance & Asset Care

We prioritize prevention over correction to minimize costly surprises:

- Routine inspections, monitoring, and servicing of equipment and infrastructure
- Strategic repairs or replacements to extend service life
- Preventative programs that reduce the need for capital reinvestments
- This proactive approach helps communities control costs, avoid disruptions, and maximize asset longevity.

Grounds, Amenities & Infrastructure

From curb appeal to functionality, our team safeguards every aspect of the community:

- Professional landscaping, turf, and horticulture care
- Pool, pond, water feature, and irrigation system maintenance
- Gates, fences, sidewalks, signage, lighting, and hardscaping upkeep
- Roadways, stormwater, and drainage system oversight
- By combining aesthetics with structural integrity, we ensure communities remain safe, attractive, and well-maintained.

Vendor Oversight & Contract Management

Kai doesn't just coordinate vendors—we actively manage them:

- Careful selection, onboarding, and supervision of contractors
- Ongoing inspections to confirm scope and performance
- Transparent reporting and recommendations to the Board
- Contract negotiation, review, and compliance support
- Verification of completed work before payment release
- Our hands-on approach guarantees value, accountability, and consistent quality service.

Quality Control & Reporting

Accountability is built into every process:

- Monthly site visits and inspections
- Team training on best practices and compliance
- Performance metrics and detailed reporting to the Board
- This structured system reduces errors, supports transparency, and helps avoid costly repair cycles.

Communication & Responsiveness

We believe field service is only effective when paired with clear communication:

- Regular updates to Boards and residents
- Transparent reporting on inspections and vendor activity
- A dedicated response guarantee for prompt resolution of issues

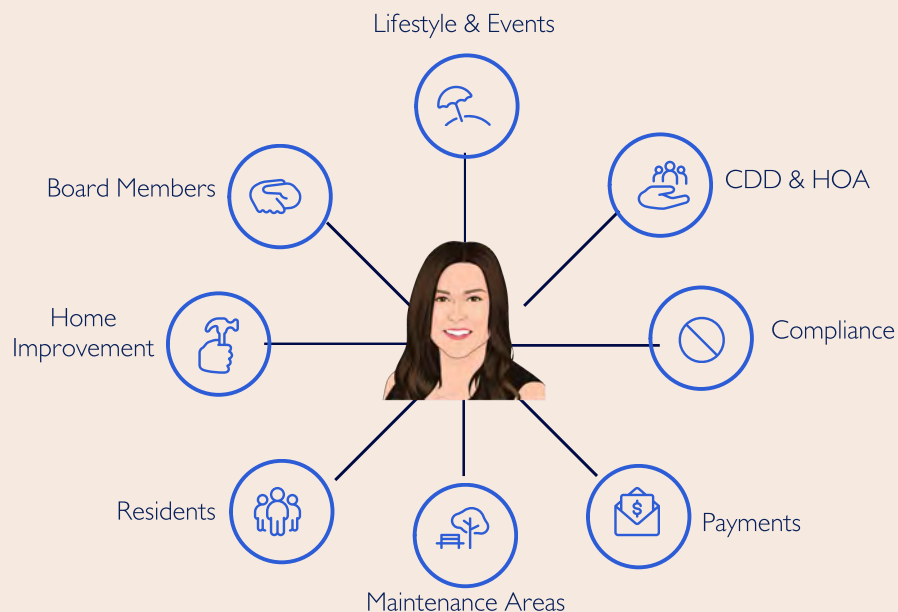
Community Experience

Creating meaningful resident experiences is a high priority at Kai. **Our Community Experience Team is Disney Certified** — a standard of service we carry with pride into every interaction, bringing a touch of magic to Westchase.

At Kai, we believe great communities are built on clear and consistent communication. That's why we've built a dedicated Community Experience Team — here to serve as a direct resource for residents. As the heart of Kai, the team is committed to providing exceptional service, quick responses, and keeping residents informed.

To make communication seamless, we'll establish a custom inbox — **Westchase@hikai.com** — exclusively for the community. Whether it's a quick question, a service request, or follow-up on community updates, our team ensures every inquiry is acknowledged and answered promptly, with care and clarity.

Westchase will also have **direct access to Heather Dilley** at Heather@hikai.com, ensuring the Board and residents can easily reach her when needed. Together, Heather's leadership and the strength of our Community Experience Team give Westchase multiple points of contact — ensuring that every question, concern, or request is addressed promptly, professionally, and with care.



At Kai, we pride ourselves on serving as a true liaison for our communities and residents. From everyday questions to more complex needs, our team takes ownership in guiding residents to the right answers and solutions.

We operate as a one-stop shop, making it simple for residents to get the support they need without being bounced around. Behind the scenes, we maintain a robust database of all things Westchase — ensuring that every interaction is informed, accurate, and personalized.

Connect with **kai***



Meet **Maria Elia**, Director of Communications

Maria is a seasoned communications professional with a bachelor's degree in Communication from The University of Tampa and over eight years of experience in communications and marketing. Specializing in public relations, copywriting, and customer service, she leads the Community Experience team, ensuring exceptional service for all residents. Maria has built a talented, collaborative team, fostering innovation and excellence, making her a valuable asset to **Kai**.

At **Kai**, communication is the foundation of how we build connected communities. Our customizable newsletters keep residents informed, engaged, and in the loop. Clear, consistent, and fun—just the way it should be.



Connect@HiKai.com



813-565-4663



www.HiKai.com

We know life can get busy, so we're here to simplify things. With multiple ways to communicate, choose the most convenient option for you to connect with us!



24 hour response guarantee(d)

We know that communication is everything when it comes to community management. That's why we stand behind a simple promise: if you reach out to us, you will always get a timely response.

If for any reason we don't respond within the guaranteed time frame, you'll receive a \$5 gift card, on us. It's our way of putting accountability into action—not just words.

Happiness Promise

Mission: To Maximize Happiness

Starting with you...



Our Happiness Promise: After each interaction with Kai, we'll send a quick satisfaction survey. If you're not happy, we'll make it right!

Your feedback helps us keep raising the bar, so every conversation, call, or email leaves you feeling supported and cared for. We don't just want to resolve issues—we want you to walk away with a smile, knowing Kai is here to make your experience easier, clearer, and happier every time.



Meet **Kaylee Roach**, Happiness Manager

Kaylee plays a key role in cultivating a positive and productive workplace as **Kai's** Happiness Manager. From planning engaging events to coordinating team trainings, she ensures employees have the tools, resources, and support they need to thrive. Her focus is on empowering our people—so they can be their best for your community.

Happiness Promise

With resident happiness as our number one priority, the **Kai** team strives to make every interaction positive. Quick to resolve problems, and even quicker to prevent them, **Kai** is here to keep the good vibes going.

Be kind

Leading with kindness enables us to make genuine connections, show empathy, and make every interaction more positive.

Do the right thing

When faced with a choice, we skip the shortcuts and take the high road — keeping our cool even when there are bumps along the way.

Foster mutual trust & respect

We use radical transparency and teamwork to promote openness and build trust among our employees, clients, and residents.

Communicate & innovate

Tech-forward operations allow us to reduce friction and deliver information to communities and residents in real-time.

Westchase CDD

Proposed District Management Services

Current (annual) Management Fee	Proposed Kai (annual) Management Fee
\$128,000	\$125,000

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) Meetings that exceed two hours will be subject to an hourly rate.



What to Expect!

A Streamlined Path Forward with Kai

At **Kai**, we don't just manage services—we elevate the community experience. Through a fully integrated approach, we support your district with care, consistency, and a commitment to long-term success.

1. Continuity & Confidence

As the current management team, Kai already understands the nuances of your community—its operations, stakeholders, and residents. This existing familiarity ensures a smooth continuation of services with no learning curve or disruption.

2. Enhanced Program Alignment

With deep insight into your district's goals and needs, we can immediately tailor and scale programs across lifestyle, governance, compliance, and amenity services—refining what works and evolving where needed.

3. Built-In Operational Readiness

Our team, systems, and vendor relationships are already in place. That means no onboarding delays, no handoffs, and no downtime. We're ready to hit the ground running from day one.

4. Ongoing Partnership & Optimization

We remain proactive, responsive, and committed to growth. Our real-time feedback loops and collaborative approach ensure continuous improvement and alignment with your evolving vision.

Your vision. Our infrastructure.

One trusted partner.

Let **Kai** help you bring it to life—
from the ground up.



References

Mike Lawson, North AR-1 CDD Chairman

As the Chairman of the Board of Supervisors for eighteen separate community development districts located throughout Florida, the level of talented and experienced CDD management personnel that Kai possesses is second to none. The management depth that Kai provides ensures that all required administrative functions consisting of accounting, CDD meetings, operations & maintenance and debt service assessments and payments and many other services are professionally performed. Also, and equally important, Kai maintains an excellent level of communication with the board members as well as providing timely and prompt responses to our residents.

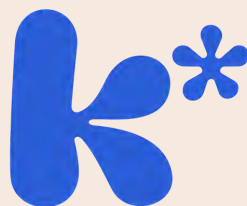
Lori Price, Mirada II CDD Supervisor

As a Supervisor, I've had the pleasure of working closely with Kai as our district management company, and they've consistently exceeded expectations. Their timeliness, efficiency, and attention to detail are unmatched, and their proactive communication ensures we're always informed and aligned. The team is responsive, thorough, and truly a pleasure to work with—I'm confident in their ability to support our district's needs with professionalism and care.

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

**Ira Hertz, Supervisor
Zephyr Lakes CDD
914-329-2700**

**Daniel Holloway, Supervisor
Union Park CDD
danielhollowayupcdd@gmail.com**





kai*

Say hi to happy living



Additional Fee Schedule

Service	Fee
Board Meetings	
Additional meetings beyond contracted amount	\$275.00 per hour
Additional hours beyond two (2) hours per meeting	\$275.00 per hour
Mail Distribution	
Standard letter/distribution (up to 2 pages)	\$0.40 per piece
Additional inserts over 2 pages	\$0.03 per additional page
Postage	
Certified Mail	Current USPS rate
Certified Mail handling charge	\$5.00 in addition to postage
Copies	
Black & White	\$0.20 per copy
Color	\$0.50 per copy
Storage	
Records outside required statutory retention period	\$20.00 per box, per month
Non-Contractual Services	
Court appearances, special projects, or tasks outside contractual scope	Market rate based on staff utilization, agreed in writing prior to work commencing



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

08/20/2025

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).

PRODUCER Herbie Wiles Insurance 400 N Ponce de Leon Blvd St. Augustine FL 32084	CONTACT NAME: Brittani Randall PHONE (A/C, No, Ext): (904) 829-2201 E-MAIL ADDRESS: brandall@herbiwiles.com FAX (A/C, No): (904) 829-2020
INSURED Breeze Connected, LLC, DBA: Breeze 2161 E. County Road 540A #225 Lakeland FL 33813-3794	INSURER(S) AFFORDING COVERAGE INSURER A: AUTO OWNERS INSURANCE COMPANY INSURER B: SOUTHERN OWNERS INSURANCE COMPANY INSURER C: UNITED STATES LIABILITY INSURANCE COMPANY INSURER D: INSURER E: INSURER F:
	NAIC # 18988 10190 25895

COVERAGES**CERTIFICATE NUMBER:** 25-26 Liab**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	☒ COMMERCIAL GENERAL LIABILITY			78425852	08/04/2025	08/04/2026	EACH OCCURRENCE \$ 1,000,000
	☐ CLAIMS-MADE ☒ OCCUR						DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 300,000
							MED EXP (Any one person) \$ 10,000
							PERSONAL & ADV INJURY \$ 1,000,000
	GEN'L AGGREGATE LIMIT APPLIES PER:						GENERAL AGGREGATE \$ 2,000,000
	☒ POLICY ☐ PRO-JECT ☐ LOC						PRODUCTS - COMP/OP AGG \$ 2,000,000
	OTHER:						Hired/Non-Owned Auto \$ 1,000,000
	AUTOMOBILE LIABILITY						COMBINED SINGLE LIMIT (Ea accident) \$
	☐ ANY AUTO						BODILY INJURY (Per person) \$
	☐ OWNED AUTOS ONLY ☐ SCHEDULED AUTOS						BODILY INJURY (Per accident) \$
	☐ HIRED AUTOS ONLY ☐ NON-OWNED AUTOS ONLY						PROPERTY DAMAGE (Per accident) \$
B	☒ UMBRELLA LIAB ☒ OCCUR			4984574200	08/04/2025	08/04/2026	EACH OCCURRENCE \$ 1,000,000
	☐ EXCESS LIAB ☐ CLAIMS-MADE						AGGREGATE \$ 1,000,000
	DED RETENTION \$						\$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY						PER STATUTE OTH-ER
	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)	Y / N	N / A				E.L. EACH ACCIDENT \$
	If yes, describe under DESCRIPTION OF OPERATIONS below						E.L. DISEASE - EA EMPLOYEE \$
							E.L. DISEASE - POLICY LIMIT \$
C	Errors and Omissions			PM 1554647E	08/04/2025	08/04/2026	Each Occurrence \$1,000,000 Deductible \$2,500

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

CERTIFICATE HOLDER**CANCELLATION**

Proof of Insurance

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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