

# Board of Supervisors' Meeting April 23, 2020

District Office:
9428 Camden Field Parkway
Riverview, Florida 33578
813.533.2950

www.watersedgecdd.org

### WATERS EDGE COMMUNITY DEVELOPMENT DISTRICT AGENDA

At the Waters Edge Clubhouse, located at 9019 Creedmoor Lane, New Port Richey, FL 34654

**Board of Supervisors** Roger LeBlanc Chairman

Teri Geney Vice Chairman
Michael McCarthy Assistant Secretary
Michaela Ballou Assistant Secretary
George Anastasopoulos Assistant Secretary

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**District Manager** Michael Rodriguez Rizzetta & Company, Inc.

**District Counsel** John Vericker Straley Robin & Vericker

**District Engineer** Greg Woodcock Cardno TBE

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

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

Pursuant to provisions of the Americans with Disabilities Act, any person requiring special accommodations to participate in this meeting / hearing / workshop is asked to advise the District Office at least forty-eight (48) hours before the meeting / hearing / workshop by contacting the District Manager at (813) 533-2950. If you are hearing or speech impaired, please contact the Florida Relay Service by dialing 7-1-1, or 1-800-955-8771 (TTY) 1-800-955-8770 (Voice), who can aid you in contacting the District Office.

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

#### WATERS EDGE COMMUNITY DEVELOPMENT DISTRICT

DISTRICT OFFICE • 9428 CAMDEN FIELD PKWY • RIVERVIEW, FL 33579 www.watersedgecdd.org

Board of Supervisors Waters Edge Community Development District April 15, 2020

#### **AGENDA**

Dear Board Members:

The regular meeting of the Board of Supervisors of the Waters Edge Community Development District will be held on **Thursday**, **April 23**, **2020** at **3:30** p.m. to be conducted by means of communications media technology telephone (929) 205-6099 ID#424-8563677 pursuant to Executive Orders 20-52 and 20-69 issued by Governor DeSantis on March 9, 2020, and March 20, 2020, respectively, and pursuant to Section 120.54(5)(b)2., Florida Statutes. The following is the agenda for this meeting:

1.	CALL	. TO ORDER/ROLL CALL
2.	AUDI	ENCE COMMENTS ON AGENDA ITEMS
3.	BUSI	NESS ADMINISTRATION
	Α.	Consideration of Minutes of the Board of Supervisors'
		Meeting held on February 27, 2020 Tab 1
	В.	Consideration of Operation and Maintenance
		Expenditures for February 2020 & March 2020 Tab 2
4.	STAF	F REPORTS
	A.	District Engineer
		i. Presentation of the SWFWM Inspection ReportTab 3
	В.	Aquatics Manager
		i. Presentation of the Waterway Inspection Report Tab 4
	C.	District Counsel
	D.	
		i. Presentation of Action Item List Tab 5
5.	BUSI	NESS ITEMS
	Α.	Consideration of Resolution 2020-03, Re-designation
		Of Assistant Secretary Tab 6
	В.	Consideration of Reserve Study Proposal Tab 7
6.	AUDI	ENCE COMMENTS AND SUPERVISOR REQUESTS
7.	ADJC	DURNMENT

We look forward to seeing you at the meeting. In the meantime, if you have any questions, please do not hesitate to call us at (813) 533-2950.

Sincerely,

Matthew Huber

Matthew Huber District Manager

1 MINUTES OF MEETING 2 3 Each person who decides to appeal any decision made by the Board with respect to any matter considered at the meeting is advised that the person may need to ensure 4 that a verbatim record of the proceedings is made, including the testimony and evidence 5 6 upon which such appeal is to be based. 7 8 WATERS EDGE 9 COMMUNITY DEVELOPMENT DISTRICT 10 11 The regular meeting of the Board of Supervisors of Waters Edge Community Development District was held on Thursday, February 27, 2020, at 3:30 p.m. at the Waters Edge 12 Clubhouse, located at 9019 Creedmoor Lane, New Port Richey, Florida 34654. 13 14 15 Present and constituting a quorum: 16 17 Roger LeBlanc **Board Supervisor, Chairman Board Supervisor, Vice Chairman** Teri Geney 18 Michael McCarthy **Board Supervisor, Assistant Secretary** 19 **Board Supervisor, Assistant Secretary** 20 Michaela Ballou **Board Supervisor, Assistant Secretary** 21 George Anastasopoulos 22 23 Also present were: 24 Joe Roethke Regional District Manager, Rizzetta & Co., Inc. 25 26 John Vericker District Counsel, Straley Robin & Vericker (via phone) Brian Fackler Sitex Aquatics 27 **ASI Landscape Management** 28 Laura Smith 29 Dale Eads **ASI Landscape Management ASI Landscape Management** 30 Justin Parker 31 Audience 32 33 FIRST ORDER OF BUSINESS Call to Order 34 35 Mr. Roethke called the meeting to order and performed the roll call. 36 37 SECOND ORDER OF BUSINESS **Audience Comments on Agenda** 38 Items 39 40 A resident asked a question about hog trapping in the meeting minutes. 41 42 (Mr. Fackler arrived at 3:32 p.m.) 43 Consideration of Minutes of the THIRD ORDER OF BUSINESS 44 45 Board of Supervisors' Regular Meeting held on January 23, 46 47 2020 48

The Board noted two clarifications that need to be updated in the Seventh and

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Tenth Orders of Business.

On a Motion by Ms. Ballou, seconded by Mr. LeBlanc, with all in favor, the Board of Supervisors approved the Minutes of the Board of Supervisors' Regular Meeting held on January 23, 2020, as amended, for the Waters Edge Community Development District.

#### **FOURTH ORDER OF BUSINESS**

Ratification of Operations & Maintenance Expenditures for December 2019 & January 2020

Mr. Roethke presented the Operations & Maintenance Expenditures for December 2019 and January 2020 to the Board for ratification.

On a Motion by Mr. McCarthy, seconded by Ms. Geney, with all in favor, the Board of Supervisors ratified the Operations & Maintenance Expenditures for December 2019 at a cost of \$24,175.43, and January 2020 at a cost of \$17,784.56, for the Waters Edge Community Development District.

#### FIFTH ORDER OF BUSINESS

#### **Staff Reports**

#### A. District Engineer

# Mr. Roethke informed the Board that the District Engineer will be inspecting the erosion issue at Shelter Cove Loop next week. A discussion ensued regarding the trimming or removal of conservation area trees. The Board confirmed that the District's Policy states that this will be the responsibility of the adjacent landowner, in the event that any vegetation is encroaching or in danger of encroaching on their property.

#### B. Aquatics Manager

#### i. Presentation of Waterway Inspection Report

Mr. Fackler reviewed the pond inspection report with the Board. Mr. Fackler updated the Board on the vegetation removal that was approved at the last meeting, which has been completed.

 Ms. Geney asked Mr. Fackler to follow up on spraying a weir on West Moon Lake. Mr. Fackler will take care of this.

 (Mr. Fackler left at 3:51 p.m.)

#### C. District Counsel

 Mr. Vericker discussed the qualifying period for the upcoming election in November 2020. Mr. Roethke will notify the Board of the qualifying period as soon as those dates are available.

 (Mr. Vericker left at 3:54 p.m.)

### WATERS EDGE COMMUNITY DEVELOPMENT DISTRICT February 27, 2020 – Minutes of Meeting

Page 3 94 D. **District Manager** 95 96 Mr. Roethke informed the Board that the next regularly scheduled meeting 97 will be held on March 26th, 2020 at 5:00 p.m. 98 99 i. **Presentation of Action Item List** 100 101 Mr. Roethke presented the Action Item list to the Board. 102 103 SIXTH ORDER OF BUSINESS **Consideration of Pressure** 104 Washing Proposals 105 106 Mr. Roethke presented proposals for pressure washing retaining walls to the Board. 107 On a Motion by Ms. Geney, seconded by Mr. Anastasopoulos, with all in favor, the Board of Supervisors approved the proposal from Top Notch for pressure washing at a cost of \$475.00, for the Waters Edge Community Development District. 108 109 SEVENTH ORDER OF BUSINESS **Consideration of Irrigation Repair Proposals** 110 111 112 Mr. Roethke presented irrigation repair proposals to the Board. A discussion ensued and Ms. Smith reviewed the details of this proposal with the Board. Mr. 113 Anastasopoulos would like to attend the next field inspection with the landscaper. 114 115 On a Motion by Ms. Geney, seconded by Mr. McCarthy, with all in favor, the Board of Supervisors approved the proposals from ASI Landscape Management for irrigation repairs at a cost of \$6,644.63, for the Waters Edge Community Development District. 116 117 Mr. Parker with ASI Landscape Management presented proposals for landscape enhancements to the Board. Ms. Geney provided an update to the rest of the Board on 118 119 this project. A discussion ensued. 120 On a Motion by Mr. McCarthy, seconded by Ms. Ballou, with all in favor, the Board of Supervisors approved the proposals from ASI Landscape Management for landscape enhancements at a cost of \$34,641.07, for the Waters Edge Community Development District. 121 122 (Ms. Smith, Mr. Eads & Mr. Parker left at 4:53 p.m.) 123 124 **EIGHTH ORDER OF BUSINESS Audience Comments** 125 126 A resident asked the pond vendor to inspect the littoral shelf on pond F1 and 127 asked about guidelines for shutting off the irrigation system. 128 **NINTH ORDER OF BUSINESS** 129 **Supervisor Requests** 

Ms. Geney asked to have quarterly testing of backup irrigation pumps.

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### WATERS EDGE COMMUNITY DEVELOPMENT DISTRICT February 27, 2020 – Minutes of Meeting Page 4

133 134	Mr. Anastasopoulos asked about	audited financials & updating the reserve study.
134 135 136 _	TENTH ORDER OF BUSINESS	Adjournment
	•	seconded by Ms. Geney, with all in favor, the meeting at 5:16 p.m. for the Waters Edge
137 138 139		
140	Secretary/Assistant Secretary	Chairman/Vice Chairman

DISTRICT OFFICE · 5844 OLD PASCO ROAD · SUITE 100 · WESLEY CHAPEL, FLORIDA 33544

## Operations and Maintenance Expenditures February 2020 For Board Approval

Attached please find the check register listing the Operation and Maintenance expenditures paid from February 1, 2020 through February 29, 2020. This does not include expenditures previously approved by the Board.

Approval of Expenditures:
Chairperson
Vice Chairperson
Assistant Secretary

The total items being presented: \$24,808.20

### Paid Operation & Maintenance Expenditures

February 1, 2020 Through February 29, 2020

Vendor Name	Check Number	Invoice Number	Invoice Description	Invo	ice Amount
Grau & Associates	001979	19141	Audit for FYE 09/30/19	\$	1,000.00
Innersync Studio, LTD	001982	17850	Annual Service - ADA Website 10/19	\$	1,537.50
Pasco County Utilities	001980	13048815	9019 Creedmoor Reclaim Lane 01/20	\$	3,499.62
Rizzetta & Company, Inc.	001974	INV000046512	District Management Fees 02/20	\$	3,783.08
Rizzetta Technology Services	001975	INV000005485	Email/Website Services 02/20	\$	175.00
Sitex Aquatics, LLC	001976	3312B	Monthly Lake Maintenance 01/20	\$	2,185.00
Sitex Aquatics, LLC	001981	3325B	Cattail Removal - West Mooklake 02/20	\$	3,500.00
Sitex Aquatics, LLC	001981	3397B	Monthly Lake Maintenance 02/20	\$	2,185.00
Straley Robin Vericker	001977	17909	General Legal Services 12/19	\$	225.00
Waters Edge Master HOA, Inc.	001978	010120 136325	Shared Cost Landscape Services 01/20	\$	6,718.00
Report Total				\$	24,808.20

DISTRICT OFFICE · 5844 OLD PASCO ROAD · SUITE 100 · WESLEY CHAPEL, FLORIDA 33544

# Operations and Maintenance Expenditures March 2020 For Board Approval

Attached please find the check register listing the Operation and Maintenance expenditures paid from March 1, 2020 through March 31, 2020. This does not include expenditures previously approved by the Board.

Approval of Expenditures:
Chairperson
Vice Chairperson
Assistant Secretary

The total items being presented: \$24,012.75

### Paid Operation & Maintenance Expenditures

March 1, 2020 Through March 31, 2020

Vendor Name	Check Number	Invoice Number	Invoice Description	Invoi	ce Amount
Ameriscape USA, Inc.	001991	137070	Remove Pine Tree - Pond G1 03/20	\$	55.00
Cardno, Inc.	001992	524876	Engineering Services 02/20	\$	357.50
George Anastasopoulos	001986	GA022720	Board of Supervisors Meeting 02/27/20	\$	200.00
Grau & Associates	001993	19293	Audit for FYE 09/30/19	\$	2,300.00
Michael T. McCarthy	001989	MM022720	Board of Supervisors Meeting 02/27/20	\$	200.00
Michaela A. Ballou	001987	MB022720	Board of Supervisors Meeting 02/27/20	\$	200.00
Pasco County Utilities	001994	13173765	9019 Creedmoor Reclaim Lane 02/20	\$	3,805.62
Rizzetta & Company, Inc.	001983	INV000047367	District Management Fees 03/20	\$	3,783.08
Rizzetta Technology Services	001984	INV000005585	Email/Website Services 03/20	\$	175.00
Roger LeBlanc	001990	RL022720	Board of Supervisors Meeting 02/27/20	\$	200.00
Sitex Aquatics, LLC	001996	3483B	Monthly Lake Maintenance 03/20	\$	2,185.00
Straley Robin Vericker	001985	18002	General Legal Services 01/20	\$	910.75

### Paid Operation & Maintenance Expenditures

March 1, 2020 Through March 31, 2020

Vendor Name	Check Number	Invoice Number	Invoice Description	<u>Invo</u>	oice Amount
Teri Lynn Geney	001988	TG022720	Board of Supervisors Meeting 02/27/20	\$	200.00
Waters Edge Master HOA, Inc.	001995	010220 136524	Shared Cost Landscape Services 02/20	\$	9,440.80
Report Total				<u>\$</u>	24,012.75



#### **MEMORANDUM**

To: Matthew Huber, Water's Edge District Manager

From: Greg Woodcock, Project Manager, Cardno

Project: Waters Edge Phase 1, 5 and 6,

SWFWMD Permit No. 26810.000

Date: March 30, 2020

On March 30, 2020, Cardno staff visited Waters Edge Community Development District to review the Stormwater Management System in general conformance with SWFWMD Permit No. 26810.000. Cardno reviewed all visible structures and conveyance ways. Below is a map showing the maintenance locations. During the inspection we documented the following items that require maintenance:

Pond # AA1 – remove silt build up under the existing control structure orifice bleed down. Contractor is to provide a 6" min clearance from blead down to existing ground elevation.

Sidewalk between amenity center and tennis courts – Remove silt and leaves from existing culvert and remove silt buildup to the pipe invert and regrade to drain. Place compacted fill 2' out from sidewalk and taper down and sod all disturbed areas. This is to eliminate the existing drop off at the sidewalk location. The photo below shows the sidewalk and culvert.





Pond #AA1 Buildup of silt around the existing intake of orifice.



Sidewalk between amenity center and tennis courts – Remove silt and leaves from existing culvert. Place compacted fill 2' out from sidewalk and taper down and sod all disturbed areas.



### Waters Edge CDD



Monthly Report
Inspection Date:3/1/20

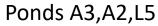
Prepared For:
Joe Roethke
Rizzetta & Company

**Prepared By:** 

Brian Fackler P: 407-402-6536

E: bfackler@sitexaquatics.com











Ponds received treatment for shoreline grasses and invasive species as needed,L5 was treated for spike rush and algae

Ponds, L17,K2,E2A







Ponds received treatment for shoreline grasses and invasive species as needed. E2A was treated for algae



Ponds, A1,F1,D2







Ponds received treatment for shoreline grasses and invasive species as needed, F1 has had the shelf sprayed for invasive grasses

Ponds, G1,CH2,AA2







Ponds received treatment for shoreline grasses and invasive species as needed. G! and CH2 has been treated for spike rush



### Ponds,K1,L16,AA1







Ponds received treatment for shoreline grasses and invasive species as needed AA1 has been treated for algae



#### **MONTHLY SUMMARY**

Spring is here! We have had warmer days this past month that have contributed to algae blooms as wel as some shoreline vegetation. All have been treated as needed.

As always please feel free to reach out to myself or one of my staff should you have any questions or concerns.

Regards Brian Fackler Field Operations Manager Sitex Aquatics IIc

#### WATERS EDGE CDD - ACTION ITEMS

	WATERS EDGE C	DD - ACTION ITEMS		
START DATE	ACTION ITEM	COMMENTS	FOLLOW-UP REQUIRED	COMPLETION DATE
2/27/20	Backup irrigation check	DM to ensure on-site staff has a quartertly schedule in place for backup irrigation checks	YES	
1/23/20	Retaining wall pressure washing	DM to obtain proposals for pressure washing retaining walls. Proposal approved, work should be completed shortly.	YES	
10/24/19	Reserve Studies	Reminder to check reserve study when reviewing budget for next fiscal year. DM will work on obtaining a proposal to update the reserve study.	YES	
8/26/19	Landscape proposals for entry enhancements	Michaela and Teri meeting separately with Yellowstone to review area; Yellowstone to provide proposal. Proposal has been provided and sent to Ed, and is also on next meeting agenda. Teri will be providing additional proposals to be reviewed at the 10/24/19 meeting. Proposals will be tabled until after the HOA completes their landscape RFP process. Board will movie forward with ASI, and Teri will be working with them on updating their proposal. The Board approved a proposal from ASI at the 2/27 meeting. District Counsel is reviewing the language in the proposals.	YES	
9/11/19	Broken Landscape lighting	DM looking for vendors for repairs. Vendor has been contacted and is scheduling repairs. Proposal was presented to the Board, this was tabled until after the landscape refurbishment project is completed.	YES	
9/26/19	Shelter Cove residential erosion issue	DM sent letter to resident on 8/26/19, DE to advise if work has been completed or if resident responded to letter. DE is working on setting up a site visit with the residen to review this. DE has already met with the resident, but will be reviewing the site again the week of 3/2 to ensure proper steps have been taken to mitigate any future erosion issues.	YES	
9/26/19	Dead tree near Slidell entrance	DM is reviewing property ownership and looking for contact	YES	
8/26/19	Entry wall pressure washing	info to request removal of this tree.  Mickey following up with HOA	NO	9/26/19
7/25/19	Need status on fountain repair by Cascade	DM made contact with vendor and re-sent approved proposal on 8/22/19. Vendor will fix lights by 9/20/19 but provided another proposal for motor repair. Board approved proposal and it has been sent to the vendor to schedule motor repairs. Repairs completed 10/11/19	NO	10/11/19
8/26/19	ADA website	Proposal approved, DC drafting contract. Contract has been sent to vendor for signature. Vendor signed contract, Board Chair will sign for the CDD then the vendor will begin working on the new site. Vendor is currently working on the new site, should be completed by end of year. New ADA website up and running.	NO	11/30/19
9/26/19	Insurance review	DM is reviewing to ensure accuracy on the property schedule for CDD insurance. Mickey is reviewing HOA insurance to see if there are any duplicated items on CDD insurance. CDD insurance has been updated and refund check for premium was issued.	NO	12/12/19
10/24/19	Vegetation removal	DE working with Advanced Drainage & Hydro on previous removals and working with Sitex on potential future removals. Board approved Sitex to remove additional cattails. This is completed	NO	2/27/20

#### **RESOLUTION 2020-03**

A RESOLUTION OF THE BOARD OF SUPERVISORS OF WATERS EDGE COMMUNITY DEVELOPMENT DISTRICT REDESIGNATING AN ASSISTANT SECRETARY OF THE DISTRICT, AND PROVIDING FOR AN EFFECTIVE DATE

WHEREAS, Waters Edge Community Development District (hereinafter the "District") is a local unit of special-purpose government created and existing pursuant to Chapter 190, Florida Statutes, being situated entirely within Pasco County, Florida; and

WHEREAS, the Board of Supervisors (hereinafter the "Board") previously designated Joseph Roethke an Assistant Secretary pursuant to Resolution 2019-03;

### NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF WATERS EDGE COMMUNITY DEVELOPMENT DISTRICT:

Section 1. Matthew Huber is appointed Assistant Secretary.

Section 2. This Resolution shall become effective immediately upon its adoption.

PASSED AND ADOPTED THIS 23rd DAY OF APRIL, 2020.

WATERS EDGE COMMUNITY DEVELOPMENT DISTRICT

	CHAIRMAN	
ATTEST:		



#### March 2, 2020

Waters Edge CDD c/o Rizzetta and Company 5844 Old Pasco Rd., Suite 100 Wesley Chapel, Florida 33544

> RE: Reserve Study Update with Site Inspection Waters Edge CDD 9019 Creedmoor Lane New Port Richey, FL 34654

#### Dear Board of Supervisors:

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

Waters Edge CDD is primarily a single family residential development that also includes a small area of townhomes. The overall development encompasses 1,069 lots in 5 different planning phases. Construction in the District started in 2005 and is nearing completion. Total site size for the community is approximately 712 acres. The CDD is located in New Port Richey, Pasco County, Florida. After a review of plats, aerials, and county records, we recommend the following reserve items be included in the report:

- Stormwater Drainage
- Monuments
- Ponds
- Wells
- Landscaping
- Any Other Items Specified by You

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

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PHONE: 813.932.1588 WEB: www.reservestudyfl.com
FAX: 813.388.4189 ADDRESS: 12407 N Florida Ave, Tampa, FL 33612



#### **Scope of Service**

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

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

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#### **Qualifications**

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

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

#### A partial list of our clients include:

- **Greenacre Properties**
- **Standard Pacific Homes**
- Leland Management
- M/I Homes
- Associa Gulf Coast
- Sentry Management
- Starwood Land Ventures
- Management & Associates
- Resource Property Management
- Condominium Associates
- Insurance Office of America
- Argus Property Management
- Creative Management
- Many Other Individually Managed Associations

- The Mahaffey Apartment Company
- Rizzetta & Company
- First Service Residential
- Brown & Brown Insurance
- **Taylor Morrison Homes**
- Vanguard Management Group
- Lennar Homes
- McNeil Management Services
- Development Planning and Financing Group

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- **Qualified Property Management**
- Avid Property Management
- Southshore Property Management
- Terra Management Services

WEB: www.reservestudyfl.com

PHONE: 813.932.1588 ADDRESS: 12407 N Florida Ave, Tampa, FL 33612 FAX: 813.388.4189



### Experience

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

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

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

#### Heritage Harbour South CDD, Bradenton, Florida

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

#### Venetian CDD, Venice, FL

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

#### Riverwood CDD, Port Charlotte, FL

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

#### Two Creeks CDD, Middleburg, FL

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

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PHONE: 813.932.1588 WEB: www.reservestudyfl.com
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#### **Services**

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

**Reserve Study Update with Site Inspection (Level-2)** \$1,800 We will provide you with electronic copies of the report. Payment will be due at the first submission of the report. The report will be completed within six weeks of our firm receiving this engagement letter signed and faxed or emailed to our office. Thank you again for the opportunity to present our proposal to you. Sincerely, Steven M. Swarts aul Lalli Paul Gallizzi Steven Swartz, RS Florida General Contractor #CGC-019465 Reserve Specialist Designation No. 214 State-Certified General Appraiser RZ110 State-Certified General Appraiser RZ3479 Accepted by Signature: Date Accepted by Printed Name: