

**Contact Us:**

**Customer Service**  
**(352) 753-4508**

**Administration**  
**(352) 751-3939**

**Budget**  
**(352) 674-1920**

**Community Standards**  
**(352) 751-3912**

**Community Watch**  
**(352) 753-0550**

**Property Management**  
**(352) 753-4022**

**Finance Customer Service**  
**(352) 750-0000**

**Human Resources**  
**(352) 674-1905**

**Public Safety**  
**(352) 205-8280**

**Purchasing**  
**(352) 751-6700**

**Recreation Administration**  
**(352) 674-1800**

**Risk Management**  
**(352) 674-1828**

**Utility Operations**  
**(352) 751-3939**

# District Weekly Bulletin



## CDD Orientation

This valuable program is held each Thursday at 10:00 a.m. at the District office located at 984 Old Mill Run in Lake Sumter Landing. For additional information, please contact the District Customer Service Center at 352-753-4508.

**CDD Orientation is cancelled until further notice.**

## Information Provided by...



### District Administrative Offices

As the safety of residents, guests, staff and visitors in The Villages community continues to be of utmost importance to the District, all District Administrative Offices will continue to be open on an appointment only basis until further notice. Appointments can be made by emailing or contacting the appropriate District Department.

- Administration- 352-751-3939 or [CustomerService@districtgov.org](mailto:CustomerService@districtgov.org)
- Bonds- 352-751-3900 or [Bonds@districtgov.org](mailto:Bonds@districtgov.org)
- Community Standards- 352-751-3912 or [DeedCompliance@districtgov.org](mailto:DeedCompliance@districtgov.org)
- Customer Service- 352-753-4508 or [CustomerService@districtgov.org](mailto:CustomerService@districtgov.org)
- Human Resources- 352-674-1905 or [HumanResources@districtgov.org](mailto:HumanResources@districtgov.org)
- Recreation- 352-674-1800 or [RecreationDepartment@districtgov.org](mailto:RecreationDepartment@districtgov.org)
- Risk Management– 352-674-1828 or [RiskManagement@districtgov.org](mailto:RiskManagement@districtgov.org)
- Utilities- 352-750-0000 or [Utilities@districtgov.org](mailto:Utilities@districtgov.org)

If you do not know which department to contact, please call the District Customer Service Center at 352-753-4508.

Masks are required for all appointments at all District Administrative offices, due to the nature of the transactions being less than 6 feet apart.

**There is a drop box available in the breezeway outside of the District office located at 984 Old Mill Run. If you need to drop off correspondence, please utilize the locked drop box.**

## Information Provided By...



Due to no new business items needing to be addressed, several District Boards & Committees elected to cancel their December meetings. The following breakdown identifies which Boards and Committees will meet during the month of December 2020 and which Boards will resume their normal meeting schedules in January 2021. For additional information, please visit [www.DistrictGov.org](http://www.DistrictGov.org) or call (352) 753-4508.

### **The following Boards have cancelled their December 2020 meetings and will resume their normal meeting schedule in January 2021;**

- Village Community Development District No. 3
- Village Community Development District No. 5
- Village Community Development District No. 6
- Village Community Development District No. 8
- Village Community Development District No. 11
- Village Community Development District No. 12
- Brownwood Community Development District
- North Sumter County Utility Dependent District

### **The following Boards and Committees will hold their December 2020 meetings to address pending items;**

- Amenity Authority Committee
- Project Wide Advisory Committee
- Village Center Community Development District
- Sumter Landing Community Development District
- Village Community Development District No. 1
- Village Community Development District No. 2
- Village Community Development District No. 4
- Village Community Development District No. 7
- Village Community Development District No. 9
- Village Community Development District No. 10
- Village Community Development District No. 13

## **December and January Holiday Information**

The District Customer Service Center and all District administrative offices will be closed on Friday, December 25, 2020 in observance of Christmas. We will resume normal business hours on Monday, December 28th.

The offices will also be closed on Friday, January 1, 2021 in observance of New Year's Day. We will resume normal business hours on Monday, January 4th.

If you have any questions or would like additional information, please contact the District Customer Service Center at (352) 753-4508.

### **Recreation Center Holiday Closings**

**Thursday, December 24, 2020**– All Recreation Centers will be open as usual, but will close at 6:00 p.m. Fitness Clubs will be open from 6:30 a.m. to 1 p.m.

**Friday, December 25, 2020**- Recreation Offices, Recreation Centers and Fitness Clubs will be closed.

Although the recreation centers are closed the outdoor facilities and swimming pools will be open for your enjoyment. Regular weekend services will resume Saturday, December 26, 2020.

**Thursday, December 31, 2020**- Recreation Centers will be open as usual from 7 a.m. to 9 p.m. Fitness Clubs will be open from 6:30 a.m. to 1 p.m. Resident Lifestyle Group meetings will end at 1 p.m. in preparation of New Year's Eve Celebrations.

**Friday, January 1, 2021**- Recreation Offices, Recreation Centers and Fitness Clubs will be closed.

Although the recreation centers are closed the outdoor facilities and swimming pools will be open for your enjoyment. Regular weekend services will resume Saturday, January 2, 2021.



# **Sanitation Holiday Information**

## **Village Community Development Districts 1-11**

If you live in Village Community Development Districts 1-11 in the Sumter County, Marion County or Fruitland Park portions of The Villages, there will be no sanitation collection on Friday, December 25, 2020 and Friday, January 1, 2021. Collection will be on Saturday, December 26<sup>th</sup> and Saturday, January 2<sup>nd</sup>.

## **Village Community Development District No. 12 and No. 13**

If you live in Districts 12 and 13, there will be no sanitation collection on Friday, December 25, 2020 and Friday, January 1, 2021. Collection will be on your next scheduled day, Tuesday, December 29<sup>th</sup> and Tuesday, January 5<sup>th</sup>.

If you live in the **Lake County portion of The Villages** (not including VCDD No. 11), please contact Lake County Solid Waste at (352) 343-3776 for information on your sanitation schedule.

If you live in the **Town of Lady Lake portion of The Villages**, there will be no sanitation collection on Friday, December 25, 2020 and Friday, January 1, 2021. Collection will be on your next scheduled day, Tuesday, December 29<sup>th</sup> and Tuesday, January 5<sup>th</sup>.





# Information Provided By...



## HOW TO REGISTER ON OUR WEBSITE!

Many Recreation & Parks-sponsored events now require registration. Set up an account and register online at any time using these steps below:

The Villages® Community Development Districts Search

Home
Your District ▾
Committees ▾
**1** Departments ▾
How Do It? ▾
Contact Us
Useful Links
FAQ

**1** Go to DistrictGov.org> click on Departments: Recreation.

**2** Click Here to Register Now button on right side of the screen.

**3** You will be redirected to our registration home page. In the upper right hand corner, there is a Create Account or Login button.

**4** To create an account, fill out form and click submit. To login, type in the email address and password used to sign up. If you have forgotten your password, type in the email address and then click the forgot password feature to email a reset. After you have successfully logged in you will be able to register for different Recreation & Parks events/activities.

**2**

- Administration
- Budget
- Community Standards
- Community Watch
- Customer Service Center
- District Clerk
- District Property Management
- Finance
- Executive Golf
- Human Resources
- Public Safety
- Purchasing
- Recreation**
- Risk Management
- Utilities

**3**

[Click Here TO REGISTER NOW!](#)

[Create Account | Login](#)

If you experience issues creating an account or logging in, please feel free to contact Recreation Administration at 352-674-1800 Monday – Friday from 8am-5pm

**The Villages®**  
**Recreation & Parks**

RecreationDepartment@DistrictGov.org

Home Page Resident Lifestyle Clubs & Contacts The Enrichment Academy Instructor Contacts

**4**

First Name:  (Primary Contact)

Last Name:  (Primary Contact)

Middle Name:

Prefix:

Nickname:

Language: English (USA) ▾

Birthday:  ▾

Gender:  ▾

Address:

City:

Country: United States ▾

State: Florida ▾

Zip:

Residence:  (ex: XXXXXXXXXXXX, Non US/Canada start with +)

Emergency Contact:  (ex: XXXXXXXXXXXX, Non US/Canada start with +)

Emergency Phone:  (ex: XXXXXXXXXXXX, Non US/Canada start with +)

Neighborhood:

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Club Website Address:

If Yes:

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Email:

Password:

Verify Password:

Password Requirements: Between 8-16 characters, 1 alphabetic, 1 numeric, 1 special character (e.g. !@#), no spaces

Opt-In

Yes, I want to receive email updates on events and activities

Family Members:

Add Member

Edit Member

Update Family Member Address Information

# Information Provided By...

**The Villages®**  
Community Development Districts  
Recreation & Parks



## Holiday Giving Virtual 5K

Whether you are a beginner looking to complete your first 5K, an experienced distance runner or somewhere in-between, you're invited to try this first ever Virtual 5K.



## Holiday Giving Virtual 5K DECEMBER 1-20

PICK A PLACE | SET YOUR PACE | GO THE DISTANCE

# REGISTER NOW

Whether you are a beginner looking to complete your first 5K, an experienced distance runner or somewhere in-between, you're invited to participate in **The Villages Recreation & Parks Department first ever Holiday Giving Virtual 5K!**



**PICK A PLACE**



**SET YOUR PACE**



**GO THE DISTANCE**

**REGISTRATION PERIOD: 11/19/20- 11/30/20**

**Cost: \$10 | Register at any Regional Recreation Complex between 8:30 AM - 4 PM. Race shirt will be provided upon registration. Participation & completion of 5K will be accepted on the honor system. Please bring Resident/Guest ID/State issued ID for verification.**

**Finisher Medals Pick-Up\***  
9 AM - 11 AM  
12/21 at Eisenhower  
12/22 at Laurel Manor  
12/23 at La Hacienda

\*Accepting donations of canned goods for the Seeds of Hope Food Drive.

**Sign Up Is Required. For More Information Call 352-753-1716  
Email [RecreationDepartment@DistrictGov.org](mailto:RecreationDepartment@DistrictGov.org) | [DistrictGov.org](http://DistrictGov.org)**

**The Villages®**  
Recreation & Parks

Always check with your health care provider prior to participating or visiting any recreation center. If you are sick or have symptoms of fever, cough, shortness of breath, or have been recently exposed, or are waiting for results to COVID-19, please do not come to any recreation center or facility until you have a doctor's clearance. Stay at least 6 feet away from others. Wearing a mask is required if 6 feet cannot be maintained between you and any other individuals. Bring your own water bottle, hand sanitizer, and sanitation wipes.



Information Provided By...

The Villages®  
Community Development Districts  
Recreation & Parks



Camp Villages Holiday Weeks

Join us in creating memories while having fun with your grandchildren and family.

# CAMP Villages

INTERGENERATIONAL FUN FOR GRANDPARENTS & GRANDKIDS

## Holiday Week

DECEMBER



### 21 GIFT WRAPPING COMPETITION

Bradenton Recreation Center  
Ages 5-10 | \$4 | 2pm



### CANDY CANE HUNT

Everglades Recreation Complex  
All Ages | \$4 per person  
10am & 1:30pm



### 22 COOKIE ORNAMENTS

Truman Recreation Center | 10am  
Canal Recreation Center | 3:30pm  
Ages: 5+ | \$8



### GOLF CAR OUTDOOR MOVIE

Just for Teens  
Pimlico Recreation Center  
AGE: 13-16 | Free | 6:30pm



### HOLIDAY MEDIA TRIVIA

La Hacienda Recreation Complex  
AGE: 8-12 | \$4 | 10am & 2pm



### 23 BREAKFAST WITH SANTA

La Hacienda Recreation Complex  
All Ages | \$8 | 10am

### STORYTIME WITH ELVES

Lake Miona Recreation Complex  
AGE: 3 - 5  
\$8 | 9am



B•U•C•K•A•R•O•O•S



### GINGERBREAD HOUSE DECORATING

Chatham Recreation Center  
Sterling Heights Recreation Center  
Riverbend Recreation Center  
All Ages | 1pm | \$15 per family\*

Participants will be provided a gingerbread house that the whole family will decorate with delicious treats.  
*\*Limit one house per family.*

### 28 OUTDOOR GAMES

Laurel Manor Recreation Complex  
AGE: 6+ | \$4 | 9am & 1pm

### SNOWMAN BINGO

Rohan Recreation Complex  
AGE: 6+ | \$4 | 1pm & 3pm



### 29 ICY COLD SNOW DOUGH

Colony Cottage Recreation Complex  
AGE: 5-10 | \$8 | 1pm & 2:30pm



### SELFIE GOLF CAR SCAVENGER HUNT

Just for Teens  
La Hacienda Recreation Complex  
AGE: 13-16 | \$4 | 9am



#### SPACE IS LIMITED – REGISTRATION REQUIRED

Social Distancing Guidelines will be followed; wearing a mask is requested (if less than 6ft, mask required). Payment only required for each grandchild unless noted. Grandparents must accompany their grandchildren. Registration begins 12/03/20. Register at any regional recreation complex or online at DistrictGov.org.

The Villages®  
Recreation & Parks



For more information email [RecreationDepartment@DistrictGov.org](mailto:RecreationDepartment@DistrictGov.org) | Call 352-753-1716 | [DistrictGov.org](http://DistrictGov.org)



## Information Provided By...

**The Villages®**  
Community Development Districts  
Recreation & Parks



### Air Gun Facilities

In our efforts to keep the Air Gun Ranges in optimal condition, the usage of any type of “BB” ammunition is strictly prohibited. Flat nose .177 pellets are the only approved product for all Recreation and Parks Air Gun facilities.



## Information Provided by...

**The Villages®**  
Community Development Districts  
Property Management

### Information Provided By District Property Management

A potable water meter and valve will be replaced at the corner of Belvedere Boulevard and Parr Drive Monday, November 30, 2020 through Friday, December 11, 2020, weather permitting. Please use caution in this area and pay attention to all directional signage. If you have any questions, contact District Property Management at (352) 753-4022.



**The following facilities will be temporarily closed or have scheduled maintenance:**

⇒ **Hilltop Adult Pool**

The Hilltop Adult Pool will be closed for maintenance December 7th through December 9th.

⇒ **Chatham Recreation Center Sidewalk**

The Chatham Recreation Center Sidewalk will be closed for maintenance November 30th through December 4th.

⇒ **Chatham Recreation Center Indoor Facilities, Outdoor Facilities and Family Pool**

The Chatham Recreation Center Indoor Facilities, Outdoor Facilities and Family Pool will be closed for maintenance on December 12th.

⇒ **Mulberry Grove Regional Recreation Center Indoor Facilities, Outdoor Facilities and Sports Pool**

The Mulberry Grove Regional Recreation Center Indoor Facilities, Outdoor Facilities and Sports Pool will be closed for maintenance on December 19th.

⇒ **Allamanda Recreation Center Indoor Facilities, Outdoor Facilities and Family Pool**

The Allamanda Recreation Center, Outdoor Courts and Family Pool will be closed for maintenance on December 5th.

⇒ **Laurel Manor Regional Recreation Center Sports Pool**

The Laurel Manor Regional Recreation Center Sports Pool will be closed for maintenance December 7th through December 9th.

⇒ **Amelia Neighborhood Adult Pool**

The Amelia Neighborhood Adult Pool will be closed for maintenance December 8th through December 10th.

⇒ **Captiva Recreation Center Indoor Facilities and Outdoor Facilities**

The Captiva Recreation Center Indoor Facilities and Outdoor Facilities will be closed for cleaning and maintenance December 26th.

⇒ **Big Cypress Recreation Center Indoor Bathrooms**

The Big Cypress Recreation Center Indoor Bathrooms will be closed for maintenance November 25th through December 9th.



## Information Provided By...

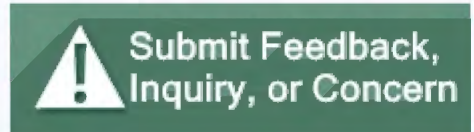
**The Villages®**  
Community Development Districts  
**Executive Golf**

### **Chula Vista Executive Golf Course**

The tee renovation at the Chula Vista Executive Golf Course is progressing nicely. During this closure, other improvements such as cart path widening and landscaping have been incorporated. We look to have this course opened in the next few weeks for residents to enjoy. We thank you for your patience during this time.



# Frequently Asked Questions and Answers



## The Villages® Community Development Districts Finance

### Did you know that there are several ways to pay your VCDD Utilities & Amenities bill?

**Automatic Withdrawal**- You can print a form from our website or request one by mail. Follow the steps below:

- [www.DistrictGov.org](http://www.DistrictGov.org)
- How Do I?
- Pay my amenities/utilities bill
- Scroll down to Auto-Pay by Bank Draft
- Click the [Authorization Form](#) hyper link
- Print, complete, sign and return along with a void check:
  - Either via email to [Utilities@DistrictGov.org](mailto:Utilities@DistrictGov.org)
  - Via courier, by dropping at our drop box at your postal station
  - By mail at 984 Old Mill Run, The Villages, Fl 32162
  - By fax to 352-674-1999

With this eco-friendly payment option, no return envelope is provided and no resources are utilized to return a physical payment to us. If you also elect to receive your bill via email, your carbon footprint will be reduced even further!

**Online**- By visiting [www.DistrictGov.org](http://www.DistrictGov.org), you can make payments by following the following steps. This payment type is processed through a 3<sup>rd</sup> party, Point & Pay, who will charge a nominal fee for processing the payment (\$1.00 for an e-check or 2.3% for a credit/debit card payment). You can sign up for recurring payments with this vendor that will allow you to choose the date that your payment is processed every month.

Follow the steps below:

- [www.DistrictGov.org](http://www.DistrictGov.org)
- How Do I?
- Pay my amenities/utilities bill
- Point & Pay On-line Payment Service
- Search for your account (by either name, address or account number)
- Your name (in the search results)

From here, you can either set up recurring payments through Point and Pay or make a one-time payment.



# Frequently Asked Questions and Answers



Submit Feedback,  
Inquiry, or Concern

## The Villages® Community Development Districts Finance

**Mail:** Checks made payable to your utility can be mailed to PO Box 2230, The Villages, Fl 32158-2230

**Drop Box:** Every postal station has a drop box, labeled Utilities & Amenities, where you can drop your payment in the slot with the envelope provided (no stamp required). This is picked up and received daily Monday–Friday between 5:00 am and 10:00am.

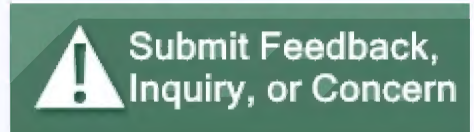
**Phone:** Please call 866-666-5661 for an Interactive Voice Response (IVR) that is available 24 hours per day. You can also call 352-750-0000 Monday – Friday from 8:00am–5:00pm. For both phone numbers, \$1 for e-check or 2.3% for credit/debit card charges will apply.

**In Person:** A representative is available, **by appointment** only Monday through Friday from 8:00 am to 5:00 pm to accept payments of either cash or check and answer all billing questions at the following locations:

- 984 Old Mill Run, The Villages, FL 32162 (enter in the breezeway next to Starbucks at Lake Sumter Landing)
- 4856 Morse Blvd, The Villages, FL 32163 (located at The Villages Public Safety Station 47).



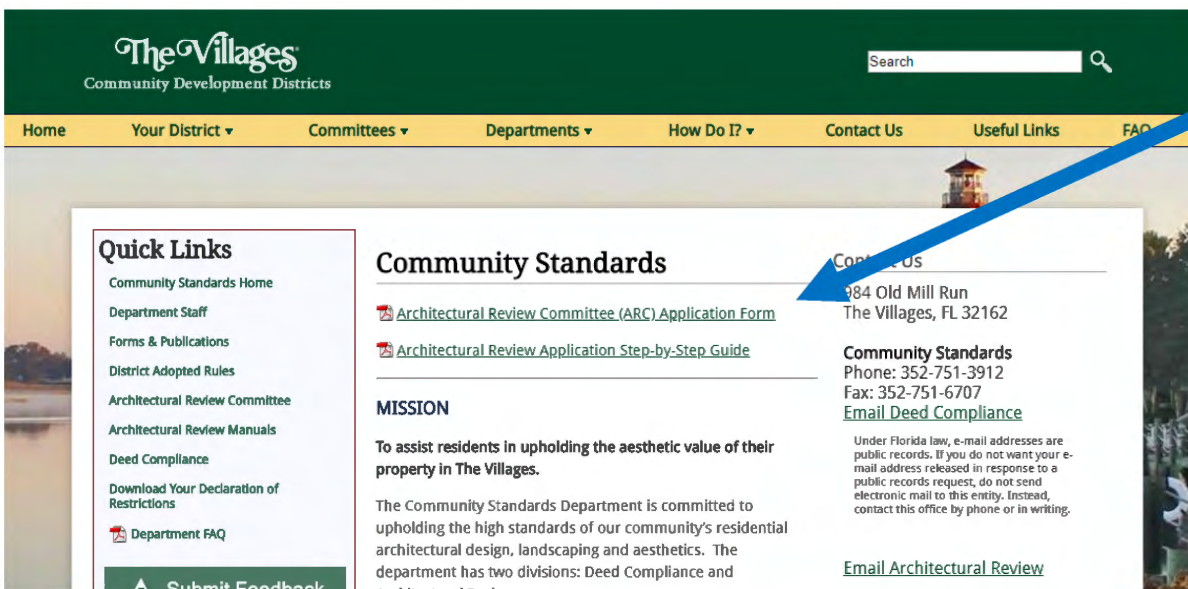
# Frequently Asked Questions and Answers



## The Villages® Community Development Districts Community Standards

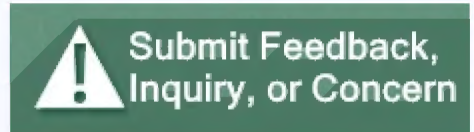
### Where do I find an architectural application form and how do I complete it?

For any external modification, an architectural application form shall be submitted for review by the Architectural Review Committee (ARC). The application is a two-sided form and easy to complete. If you visit the District website [www.DistrictGov.org](http://www.DistrictGov.org), click on Departments, Community Standards and the architectural application form is the first document listed.





# Frequently Asked Questions and Answers Continued



## The Villages® Community Development Districts Community Standards

The second document listed is a step by step guide to assist you in completing the application.

**The Villages®**  
Community Development Districts  
Community Standards

**Architectural Review Committee (ARC)  
Home/Property Alteration Application Form**

Bring/Mail application to:  
VCDD Community Standards Department  
984 Old Mill Run, The Villages, FL 32162  
Phone: (352) 751-3912 • Fax: (352) 751-6707  
[archreview@districtgov.org](mailto:archreview@districtgov.org) / [www.districtgov.org](http://www.districtgov.org)

**For Office Use Only**  
App#: \_\_\_\_\_  
Dist#: \_\_\_\_\_

Unit and lot can be found on your Villages Resident ID Card.

Sign the application.

Property Owner(s) Name \_\_\_\_\_ Signature \_\_\_\_\_

Address \_\_\_\_\_ Village of \_\_\_\_\_

Phone Number \_\_\_\_\_ Unit \_\_\_\_\_ Lot \_\_\_\_\_  Courtyard Villa  Patio Villa  Home

Contractor Business Name \_\_\_\_\_ Phone \_\_\_\_\_

**Please check appropriate box for Application Result Notification:**  
 Will Obtain Results from District Website  Mail Application  
 Property Owner will pick up application  Contractor will pick up application  
 E-Mail Application \_\_\_\_\_  
(Address if different from above)

Include the Village you reside in and your home type.

How would you like us to notify you of your application results?

Describe all requested modifications or alterations below:

Provide full description of modification. For example:  
**DO NOT STATE:** Landscaping  
**DO:** Add additional landscape bed along SW corner of home 4' x 6'. Will include mulch, 2 hibiscus, 1 palm tree and 6 annual plantings. Height of plantings shall be no higher than 20". There will be a landscaping wall not to exceed 18" and the bed will remain 3' off the property line.  
**NOTE:** All modifications shall be highlighted on the site plan.

The deadline to receive architectural applications is noon on Tuesday to be heard the following Wednesday. No matter what your request is for, if you need assistance with your application staff would be more than happy to assist you with going through the process. Please contact the Community Standards Department at [archreview@districtgov.org](mailto:archreview@districtgov.org). Applications can be submitted in the District Correspondence box located at each postal station or in the drop box in the breezeway located outside of 984 Old Mill Run in Lake Sumter Landing.

**Did you know you can find the upcoming Architectural Review Committee Agendas online?**

Visit www.DistrictGov.org.

Click on Departments and then Community Standards.



From the left hand side of the screen, under Quick Links, click on Architectural Review Committee.



From the left hand side of the screen, under Quick Links, click on Public Meeting Notices and Results.

You can find the upcoming agenda on the top line.

| Meeting Date | Meeting Type                   | Meeting Location      | Online Agenda |
|--------------|--------------------------------|-----------------------|---------------|
| 12/09/20     | Architectural Review Committee | Large Conference Room |               |

A screenshot of the 'Meetings' table on the website. The table has a white background and a grey border. It has four columns: Meeting Date, Meeting Type, Meeting Location, and Online Agenda. A blue arrow points from the 'Meeting Type' column to the right side of the page.



**The Villages®**  
Community Development Districts  
**Risk Management**

It is December, which means you will see a noticeable increase in residents, guests, vehicles and pedestrians due to the holiday season and part-time residents arriving to enjoy our warm Florida winter! Risk Management would like to offer these safety tips to keep in mind not only when you are walking but as a driver of your vehicle or golf cart.

**The following are Pedestrian Tips from the NHTSA (National Highway Traffic Safety Administration):**

⇒ **Use Sidewalks**

Walk on sidewalks whenever they are available. If there is no sidewalk, walk facing traffic and as far from traffic as possible.

⇒ **Be Predictable**

Follow the rules of the road and always obey signs and signals.

⇒ **Stay Alert At All Times**

Don't be distracted by electronic devices that take your eyes and ears off of the road.

⇒ **Cross Roadways At Crosswalks or Intersections**

Look for cars in all directions. If a crosswalk or intersection isn't available, cross at a well-lit area where you can view all traffic.

⇒ **Never Assume A Driver Sees You**

Make sure the vehicle comes to a complete stop and make eye contact with the driver as you approach. This is especially important in parking lots when drivers can be distracted looking for a spot.

⇒ **Be Visible At All Times**

Wear bright clothing during the day and reflective materials or use lights in the dark (morning and evening).







**The Villages®**  
Community Development Districts  
**Risk Management**

**FACT: Most pedestrian deaths occur in urban areas, at non-intersection locations and at night.**

**While you are behind the wheel, keep the following in mind, especially during these busy winter months:**

⇒ **Always Watch For Pedestrians**

Safety is a shared responsibility! Watch for pedestrians, bicyclists and other small motorists at all times.



⇒ **Use Extra Caution During Hard-To-See Conditions**

Be especially vigilant during early morning hours, evenings and bad weather.

⇒ **Slow Down And Be Prepared To Stop**

When turning corners or otherwise entering a cross walk slow down and be prepared to stop. Also, never go over 5 MPH in a parking lot.

⇒ **Yield To Pedestrians**

Always yield to pedestrians in crosswalks. Stop well back from the crosswalk to give other vehicles an opportunity to see the crossing pedestrians and stop too.

⇒ **Never Pass Stopped Vehicles At Crosswalks or Intersections**

There may be pedestrians or bicyclists crossing that you can't see.



**The Villages®**  
Community Development Districts  
**Risk Management**

⇒ **NEVER DRIVE UNDER THE INFLUENCE**

Almost half (47%) of crashes that resulted in a pedestrian death involved alcohol for the driver and/or the pedestrian.

⇒ **Follow The Speed Limit**

Follow the speed limit especially in school zones and neighborhoods where children can be playing. Higher vehicle speeds increase both the likelihood of a pedestrian being struck by a car and the severity of injury.

⇒ **Be Extra Cautious When Backing Up**

Always turn and look in all directions while backing up. Do not rely on mirrors or back-up cameras where there are blind spots.

**FACT : Per trip, pedestrians are 1.5 times more likely than passenger vehicle occupants to be killed in a car crash.**



**Sources:** <https://www.nhtsa.gov/road-safety/pedestrian-safety>

[https://www.cdc.gov/transportationsafety/pedestrian\\_safety](https://www.cdc.gov/transportationsafety/pedestrian_safety)

## Information Provided By...



### ARCHITECTURAL REVIEW COMMITTEE

Is seeking an alternate volunteer committee member for Village Community Development District No. 4

Village Community Development District No. 4 (District 4) is seeking an alternate primary representative on the Architectural Review Committee (ARC).

The **alternate applicant** must be a full time resident of District No. 4, lived in The Villages for at least one year and attended a minimum of one (1) Architectural Review Committee meeting. Candidates are recommended to have education and/or experience in any of the following areas: architecture, ability to read site plans, residential/commercial construction, building management, deed restricted communities, landscaping, county code enforcement, etc; however, this is not required. This requires attendance at the ARC meeting every week for the first four (4) weeks and once every month thereafter. The Committee meets weekly, on Wednesdays, for approximately 3 1/2 hours (8:00 a.m. until 11:30 a.m.).

If you are interested in becoming an alternate volunteer representative for District No. 4, applications are available on the link below. Please complete the application and return it to the Community Standards Department, 984 Old Mill Run, The Villages, Florida, no later than 5:00 p.m. on January 22, 2021. For information about the position, contact the Community Standards Department at 751-3912.



The Villages®  
Community Development Districts  
Community Standards

COMMUNITY STANDARDS DEPARTMENT  
ARCHITECTURAL REVIEW COMMITTEE  
**ALTERNATE** VOLUNTEER MEMBER FOR  
VILLAGE COMMUNITY DEVELOPMENT DISTRICT NO. 4

APPLICATION FOR MEMBERSHIP

This application **must** be returned to the Community Standards Department, 984 Old Mill Run, The Villages, Florida **no later than 5:00 p.m. on January 22, 2021.**

I understand that being an alternate member of the Architectural Review Committee (ARC) is a volunteer position which requires attendance at the ARC meeting every week for the first 4 weeks and once every month thereafter. **The applicant must be a full time resident of Village Community Development District No. 4, lived in The Villages for at least one year and attended a minimum of one (1) Architectural Review Committee meeting.** Committee members are recommended to have education and/or experience in any of the following areas: architecture, ability to read site plans, residential/commercial construction, building management, deed restricted communities, landscaping, county code enforcement, etc.

1. Please briefly describe your past business or career paths.

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2. What special skills or education do you have that would benefit the ARC? (Please include special skills, experience or training such as architect, ability to read site plans, builder, condo/building management, working with deed restricted communities, etc.)

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3. Are you familiar with your deed restrictions and/or covenants?      Y      N`

Signature \_\_\_\_\_ Phone \_\_\_\_\_

Print Name \_\_\_\_\_ Village of \_\_\_\_\_

Address \_\_\_\_\_ Date \_\_\_\_\_

**FORM 1**

**STATEMENT OF  
FINANCIAL INTERESTS**

**2019**

Please print or type your name, mailing address, agency name, and position below:

FOR OFFICE USE ONLY:

LAST NAME -- FIRST NAME -- MIDDLE NAME :

MAILING ADDRESS :

CITY : ZIP : COUNTY :

NAME OF AGENCY :

NAME OF OFFICE OR POSITION HELD OR SOUGHT :

CHECK ONLY IF  CANDIDATE OR  NEW EMPLOYEE OR APPOINTEE

**\*\*\*\* THIS SECTION MUST BE COMPLETED \*\*\*\***

**DISCLOSURE PERIOD:**

THIS STATEMENT REFLECTS YOUR FINANCIAL INTERESTS FOR CALENDAR YEAR ENDING DECEMBER 31, 2019.

**MANNER OF CALCULATING REPORTABLE INTERESTS:**

FILERS HAVE THE OPTION OF USING REPORTING THRESHOLDS THAT ARE ABSOLUTE DOLLAR VALUES, WHICH REQUIRES FEWER CALCULATIONS, OR USING COMPARATIVE THRESHOLDS, WHICH ARE USUALLY BASED ON PERCENTAGE VALUES (see instructions for further details). CHECK THE ONE YOU ARE USING (**must check one**):

**COMPARATIVE (PERCENTAGE) THRESHOLDS** OR  **DOLLAR VALUE THRESHOLDS**

**PART A -- PRIMARY SOURCES OF INCOME** [Major sources of income to the reporting person - See instructions]  
(If you have nothing to report, write "none" or "n/a")

| NAME OF SOURCE OF INCOME | SOURCE'S ADDRESS | DESCRIPTION OF THE SOURCE'S PRINCIPAL BUSINESS ACTIVITY |
|--------------------------|------------------|---|
|                          |                  |   |
|                          |                  |   |
|                          |                  |   |
|                          |                  |   |

**PART B -- SECONDARY SOURCES OF INCOME**  
[Major customers, clients, and other sources of income to businesses owned by the reporting person - See instructions]  
(If you have nothing to report, write "none" or "n/a")

| NAME OF BUSINESS ENTITY | NAME OF MAJOR SOURCES OF BUSINESS' INCOME | ADDRESS OF SOURCE | PRINCIPAL BUSINESS ACTIVITY OF SOURCE |
|-------------------------|---|-------------------|---------------------------------------|
|                         |   |                   |                                       |
|                         |   |                   |                                       |
|                         |   |                   |                                       |

**PART C -- REAL PROPERTY** [Land, buildings owned by the reporting person - See instructions]  
(If you have nothing to report, write "none" or "n/a")

|  |
|--|
|  |
|  |
|  |

You are not limited to the space on the lines on this form. Attach additional sheets, if necessary.

**FILING INSTRUCTIONS** for when and where to file this form are located at the bottom of page 2.

**INSTRUCTIONS** on who must file this form and how to fill it out begin on page 3.

**PART D — INTANGIBLE PERSONAL PROPERTY** [Stocks, bonds, certificates of deposit, etc. - See instructions]  
 (If you have nothing to report, write "none" or "n/a")

| TYPE OF INTANGIBLE | BUSINESS ENTITY TO WHICH THE PROPERTY RELATES |
|--------------------|---|
|                    |   |
|                    |   |

**PART E — LIABILITIES** [Major debts - See instructions]  
 (If you have nothing to report, write "none" or "n/a")

| NAME OF CREDITOR | ADDRESS OF CREDITOR |
|------------------|---------------------|
|                  |                     |
|                  |                     |

**PART F — INTERESTS IN SPECIFIED BUSINESSES** [Ownership or positions in certain types of businesses - See instructions]  
 (If you have nothing to report, write "none" or "n/a")

| NAME OF BUSINESS ENTITY                       | BUSINESS ENTITY # 1 | BUSINESS ENTITY # 2 |
|---|---------------------|---------------------|
|   |                     |                     |
| ADDRESS OF BUSINESS ENTITY                    |                     |                     |
| PRINCIPAL BUSINESS ACTIVITY                   |                     |                     |
| POSITION HELD WITH ENTITY                     |                     |                     |
| I OWN MORE THAN A 5% INTEREST IN THE BUSINESS |                     |                     |
| NATURE OF MY OWNERSHIP INTEREST               |                     |                     |

**PART G — TRAINING**

For **elected municipal officers** required to complete annual ethics training pursuant to section 112.3142, F.S.

**I CERTIFY THAT I HAVE COMPLETED THE REQUIRED TRAINING.**

**IF ANY OF PARTS A THROUGH G ARE CONTINUED ON A SEPARATE SHEET, PLEASE CHECK HERE**

**SIGNATURE OF FILER:**

**Signature:**

\_\_\_\_\_

**Date Signed:**

\_\_\_\_\_

**CPA or ATTORNEY SIGNATURE ONLY**

If a certified public accountant licensed under Chapter 473, or attorney in good standing with the Florida Bar prepared this form for you, he or she must complete the following statement:

I, \_\_\_\_\_, prepared the CE Form 1 in accordance with Section 112.3145, Florida Statutes, and the instructions to the form. Upon my reasonable knowledge and belief, the disclosure herein is true and correct.

CPA/Attorney Signature: \_\_\_\_\_

Date Signed: \_\_\_\_\_

**FILING INSTRUCTIONS:**

If you were mailed the form by the Commission on Ethics or a County Supervisor of Elections for your annual disclosure filing, return the form to that location. To determine what category your position falls under, see page 3 of instructions.

**Local officers/employees** file with the Supervisor of Elections of the county in which they permanently reside. (If you do not permanently reside in Florida, file with the Supervisor of the county where your agency has its headquarters.) Form 1 filers who file with the Supervisor of Elections may file by mail or email. Contact your Supervisor of Elections for the mailing address or email address to use. Do not email your form to the Commission on Ethics, it will be returned.

**State officers or specified state employees** who file with the Commission on Ethics may file by mail or email. To file by mail, send the completed form to P.O. Drawer 15709, Tallahassee, FL 32317-5709; physical address: 325 John Knox Rd, Bldg E, Ste 200, Tallahassee, FL 32303. To file with the Commission by email, scan your completed form and any attachments as a pdf (do not use any other format), send it to CEForm1@leg.state.fl.us and retain a copy for your records. Do not file by both mail and email. Choose only one filing method. Form 6s will not be accepted via email.

**Candidates** file this form together with their filing papers.

**MULTIPLE FILING UNNECESSARY:** A candidate who files a Form 1 with a qualifying officer is not required to file with the Commission or Supervisor of Elections.

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

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

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

**Finally,** file a final disclosure form (Form 1F) within 60 days of leaving office or employment. Filing a CE Form 1F (Final Statement of Financial Interests) does not relieve the filer of filing a CE Form 1 if the filer was in his or her position on December 31, 2019.



## NOTICE

**Annual Statements of Financial Interests are due July 1. If the annual form is not filed or postmarked by September 1, an automatic fine of \$25 for each day late will be imposed, up to a maximum penalty of \$1,500. Failure to file also can result in removal from public office or employment. [s. 112.3145, F.S.]**

**In addition, failure to make any required disclosure constitutes grounds for and may be punished by one or more of the following: disqualification from being on the ballot, impeachment, removal or suspension from office or employment, demotion, reduction in salary, reprimand, or a civil penalty not exceeding \$10,000. [s. 112.317, F.S.]**

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

1) Elected public officials not serving in a political subdivision of the state and any person appointed to fill a vacancy in such office, unless required to file full disclosure on Form 6.

2) Appointed members of each board, commission, authority, or council having statewide jurisdiction, excluding members of solely advisory bodies, but including judicial nominating commission members; Directors of Enterprise Florida, Scripps Florida Funding Corporation, and Career Source Florida; and members of the Council on the Social Status of Black Men and Boys; the Executive Director, Governors, and senior managers of Citizens Property Insurance Corporation; Governors and senior managers of Florida Workers' Compensation Joint Underwriting Association; board members of the Northeast Fla. Regional Transportation Commission; board members of Triumph Gulf Coast, Inc; board members of Florida Is For Veterans, Inc.; and members of the Technology Advisory Council within the Agency for State Technology.

3) The Commissioner of Education, members of the State Board of Education, the Board of Governors, the local Boards of Trustees and Presidents of state universities, and the Florida Prepaid College Board.

4) Persons elected to office in any political subdivision (such as municipalities, counties, and special districts) and any person appointed to fill a vacancy in such office, unless required to file Form 6.

5) Appointed members of the following boards, councils, commissions, authorities, or other bodies of county, municipality, school district, independent special district, or other political subdivision: the governing body of the subdivision; community college or junior college district boards of trustees; boards having the power to enforce local code provisions; boards of adjustment; community redevelopment agencies; planning or zoning boards having the power to recommend, create, or modify land planning or zoning within a political subdivision, except for citizen advisory committees, technical coordinating committees, and similar groups who only have the power to make recommendations to planning or zoning boards, and except for representatives of a military installation acting on behalf of all military installations within that jurisdiction; pension or retirement boards empowered to invest pension or retirement funds or determine entitlement to or amount of pensions or other retirement benefits, and the Pinellas County Construction Licensing Board.

6) Any appointed member of a local government board who is required to file a statement of financial interests by the appointing authority or the enabling legislation, ordinance, or resolution creating the board.

7) Persons holding any of these positions in local government: mayor; county or city manager; chief administrative employee or finance

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

8) Officers and employees of entities serving as chief administrative officer of a political subdivision.

9) Members of governing boards of charter schools operated by a city or other public entity.

10) Employees in the office of the Governor or of a Cabinet member who are exempt from the Career Service System, excluding secretarial, clerical, and similar positions.

11) The following positions in each state department, commission, board, or council: Secretary, Assistant or Deputy Secretary, Executive Director, Assistant or Deputy Executive Director, and anyone having the power normally conferred upon such persons, regardless of title.

12) The following positions in each state department or division: Director, Assistant or Deputy Director, Bureau Chief, and any person having the power normally conferred upon such persons, regardless of title.

13) Assistant State Attorneys, Assistant Public Defenders, criminal conflict and civil regional counsel, and assistant criminal conflict and civil regional counsel, Public Counsel, full-time state employees serving as counsel or assistant counsel to a state agency, administrative law judges, and hearing officers.

14) The Superintendent or Director of a state mental health institute established for training and research in the mental health field, or any major state institution or facility established for corrections, training, treatment, or rehabilitation.

15) State agency Business Managers, Finance and Accounting Directors, Personnel Officers, Grant Coordinators, and purchasing agents (regardless of title) with power to make a purchase exceeding \$35,000.

16) The following positions in legislative branch agencies: each employee (other than those employed in maintenance, clerical, secretarial, or similar positions and legislative assistants exempted by the presiding officer of their house); and each employee of the Commission on Ethics.

## **INSTRUCTIONS FOR COMPLETING FORM 1:**

**INTRODUCTORY INFORMATION** (Top of Form): If your name, mailing address, public agency, and position are already printed on the form, you do not need to provide this information unless it should be changed. To change any of this information, write the correct information on the form, and contact your agency's financial disclosure coordinator. You can find your coordinator on the Commission on Ethics website: [www.ethics.state.fl.us](http://www.ethics.state.fl.us).

**NAME OF AGENCY:** The name of the governmental unit which you serve or served, by which you are or were employed, or for which you are a candidate.

**DISCLOSURE PERIOD:** The "disclosure period" for your report is the calendar year ending December 31, 2019.

**OFFICE OR POSITION HELD OR SOUGHT:** The title of the office or position you held, are seeking, or held during the disclosure period even if you have since left that position. If you are a candidate for office or are a new employee or appointee, check the appropriate box.

**PUBLIC RECORD:** The disclosure form and everything attached to it is a public record. Your Social Security Number is not required and you should redact it from any documents you file. If you are an active or former officer or employee listed in Section 119.071, F.S., whose home address is exempt from disclosure, the Commission will maintain that confidentiality if you submit a written request.



## **MANNER OF CALCULATING REPORTABLE INTEREST**

Filers have the option of reporting based on either thresholds that are comparative (usually, based on percentage values) or thresholds that are based on absolute dollar values. The instructions on the following pages specifically describe the different thresholds. Check the box that reflects the choice you have made. You must use the type of threshold you have chosen for each part of the form. In other words, if you choose to report based on absolute dollar value thresholds, you cannot use a percentage threshold on any part of the form.

### **IF YOU HAVE CHOSEN DOLLAR VALUE THRESHOLDS THE FOLLOWING INSTRUCTIONS APPLY**

#### **PART A — PRIMARY SOURCES OF INCOME**

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

Part A is intended to require the disclosure of your principal sources of income during the disclosure period. You do not have to disclose any public salary or public position(s). The income of your spouse need not be disclosed; however, if there is joint income to you and your spouse from property you own jointly (such as interest or dividends from a bank account or stocks), you should disclose the source of that income if it exceeded the threshold.

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

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

Examples:

— If you were employed by a company that manufactures computers and received more than \$2,500, list the name of the company, its address, and its principal business activity (computer manufacturing).

— If you were a partner in a law firm and your distributive share of partnership gross income exceeded \$2,500, list the name of the firm, its address, and its principal business activity (practice of law).

— If you were the sole proprietor of a retail gift business and your gross income from the business exceeded \$2,500, list the name of the business, its address, and its principal business activity (retail gift sales).

— If you received income from investments in stocks and bonds, list each individual company from which you derived more than \$2,500. Do not aggregate all of your investment income.

— If more than \$2,500 of your gross income was gain from the sale of property (not just the selling price), list as a source of income the purchaser's name, address and principal business activity. If the purchaser's identity is unknown, such as where securities listed on an exchange are sold through a brokerage firm, the source of income should be listed as "sale of (name of company) stock," for example.

— If more than \$2,500 of your gross income was in the form of interest from one particular financial institution (aggregating interest from all CD's, accounts, etc., at that institution), list the name of the institution, its address, and its principal business activity.

#### **PART B — SECONDARY SOURCES OF INCOME**

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

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

(1) You owned (either directly or indirectly in the form of an equitable or beneficial interest) more than 5% of the total assets or capital stock of a business entity (a corporation, partnership, LLC, limited partnership, proprietorship, joint venture, trust, firm, etc., doing business in Florida); **and,**

(2) You received more than \$5,000 of your gross income during the disclosure period from that business entity.

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

Examples:

— You are the sole proprietor of a dry cleaning business, from which you received more than \$5,000. If only one customer, a uniform rental company, provided more than 10% of your dry cleaning business, you must list the name of the uniform rental company, its address, and its principal business activity (uniform rentals).

— You are a 20% partner in a partnership that owns a shopping mall and your partnership income exceeded the above thresholds. List each tenant of the mall that provided more than 10% of the partnership's gross income and the tenant's address and principal business activity.

#### **PART C — REAL PROPERTY**

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

In this part, list the location or description of all real property in Florida in which you owned directly or indirectly at any time during the disclosure period in excess of 5% of the property's value. You are not required to list your residences. You should list any vacation homes if you derive income from them.

Indirect ownership includes situations where you are a beneficiary of a trust that owns the property, as well as situations where you own more than 5% of a partnership or corporation that owns the property. The value of the property may be determined by the most recently assessed value for tax purposes, in the absence of a more current appraisal.

The location or description of the property should be sufficient to enable anyone who looks at the form to identify the property. A street address should be used, if one exists.

#### **PART D — INTANGIBLE PERSONAL PROPERTY**

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

Describe any intangible personal property that, at any time during the disclosure period, was worth more than \$10,000 and state the business entity to which the property related. Intangible personal property includes things such as cash on hand, stocks, bonds, certificates of deposit, vehicle leases, interests in businesses, beneficial interests in trusts, money owed you, Deferred Retirement Option Program (DROP) accounts, the Florida Prepaid College Plan, and bank accounts. Intangible personal property also includes investment products held in IRAs, brokerage accounts, and the Florida College Investment Plan. Note that the product contained in a brokerage account, IRA, or the Florida College Investment Plan is your asset—not the account or plan itself. Things like automobiles and houses you own, jewelry, and paintings are not intangible property. Intangibles relating to the same business entity may be aggregated; for example, CDs and savings accounts with the same bank. Property owned as tenants by the entirety or as joint tenants with right of survivorship should be valued at 100%. The value of a leased vehicle is the vehicle's present value minus the lease residual (a number found on the lease document).



## PART E — LIABILITIES

[Required by s. 112.3145(3)(b)4, F.S.]

List the name and address of each creditor to whom you owed more than \$10,000 at any time during the disclosure period. The amount of the liability of a vehicle lease is the sum of any past-due payments and all unpaid prospective lease payments. You are not required to list the amount of any debt. You do not have to disclose credit card and retail installment accounts, taxes owed (unless reduced to a judgment), indebtedness on a life insurance policy owed to the company of issuance, or contingent liabilities. A "contingent liability" is one that will become an actual liability only when one or more future events occur or fail to occur, such as where you are liable only as a guarantor, surety, or endorser on a promissory note. If you are a "co-maker" and are jointly liable or jointly and severally liable, then it is not a contingent liability.

## PART F — INTERESTS IN SPECIFIED BUSINESSES

[Required by s. 112.3145(6), F.S.]

The types of businesses covered in this disclosure include: state and federally chartered banks; state and federal savings and loan associations; cemetery companies; insurance companies; mortgage companies; credit unions; small loan companies; alcoholic beverage licensees; pari-mutuel wagering companies, utility companies, entities controlled by the Public Service Commission; and entities granted a franchise to operate by either a city or a county government.

Disclose in this part the fact that you owned during the disclosure period an interest in, or held any of certain positions with the types of businesses listed above. You must make this disclosure if you own or owned (either directly or indirectly in the form of an equitable or beneficial interest) at any time during the disclosure period more than 5% of the total assets or capital stock of one of the types of business entities listed above. You also must complete this part of the form for each of these types of businesses for which you are, or were at any time during the disclosure period, an officer, director, partner, proprietor, or agent (other than a resident agent solely for service of process).

If you have or held such a position or ownership interest in one of these types of businesses, list the name of the business, its address and principal business activity, and the position held with the business (if any). If you own(ed) more than a 5% interest in the business, indicate that fact and describe the nature of your interest.

## PART G — TRAINING CERTIFICATION

[Required by s. 112.3142, F.S.]

If you are a Constitutional or elected municipal officer whose service began before March 31 of the year for which you are filing, you are required to complete four hours of ethics training which addresses Article II, Section 8 of the Florida Constitution, the Code of Ethics for Public Officers and Employees, and the public records and open meetings laws of the state. You are required to certify on this form that you have taken such training.

**(End of Dollar Value Thresholds Instructions.)**

# IF YOU HAVE CHOSEN COMPARATIVE (PERCENTAGE) THRESHOLDS THE FOLLOWING INSTRUCTIONS APPLY

## PART A — PRIMARY SOURCES OF INCOME

[Required by s. 112.3145(3)(a)1, F.S.]

Part A is intended to require the disclosure of your principal sources of income during the disclosure period. You do not have to disclose any public salary or public position(s), but income from these public sources should be included when calculating your gross income for the disclosure period. The income of your spouse need not be disclosed; however, if there is joint income to you and your spouse from property you own jointly (such as interest or dividends from a bank account or stocks), you should include all of that income when calculating your gross income and disclose the source of that income if it exceeded the threshold.

Please list in this part of the form the name, address, and principal business activity of each source of your income which exceeded 5% of the gross income received by you in your own name or by any other person for your benefit or use during the disclosure period.

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

Examples:

— If you were employed by a company that manufactures computers and received more than 5% of your gross income from the company, list the name of the company, its address, and its principal business activity (computer manufacturing).

— If you were a partner in a law firm and your distributive share of partnership gross income exceeded 5% of your gross income, then list the name of the firm, its address, and its principal business activity (practice of law).

— If you were the sole proprietor of a retail gift business and your gross income from the business exceeded 5% of your total gross income, list the name of the business, its address, and its principal business activity (retail gift sales).

— If you received income from investments in stocks and bonds, list each individual company from which you derived

more than 5% of your gross income. Do not aggregate all of your investment income.

— If more than 5% of your gross income was gain from the sale of property (not just the selling price), list as a source of income the purchaser's name, address, and principal business activity. If the purchaser's identity is unknown, such as where securities listed on an exchange are sold through a brokerage firm, the source of income should be listed as "sale of (name of company) stock," for example.

— If more than 5% of your gross income was in the form of interest from one particular financial institution (aggregating interest from all CD's, accounts, etc., at that institution), list the name of the institution, its address, and its principal business activity.

## PART B — SECONDARY SOURCES OF INCOME

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

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

(1) You owned (either directly or indirectly in the form of an equitable or beneficial interest) more than 5% of the total assets or capital stock of a business entity (a corporation, partnership, LLC, limited partnership, proprietorship, joint venture, trust, firm, etc., doing business in Florida); **and,**

(2) You received more than 10% of your gross income from that business entity; **and,**

(3) You received more than \$1,500 in gross income from that business entity.

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



Examples:

— You are the sole proprietor of a dry cleaning business, from which you received more than 10% of your gross income—an amount that was more than \$1,500. If only one customer, a uniform rental company, provided more than 10% of your dry cleaning business, you must list the name of the uniform rental company, its address, and its principal business activity (uniform rentals).

— You are a 20% partner in a partnership that owns a shopping mall and your partnership income exceeded the thresholds listed above. You should list each tenant of the mall that provided more than 10% of the partnership's gross income, and the tenant's address and principal business activity.

### **PART C — REAL PROPERTY**

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

In this part, list the location or description of all real property in Florida in which you owned directly or indirectly at any time during the disclosure period in excess of 5% of the property's value. You are not required to list your residences. You should list any vacation homes, if you derive income from them.

Indirect ownership includes situations where you are a beneficiary of a trust that owns the property, as well as situations where you own more than 5% of a partnership or corporation that owns the property. The value of the property may be determined by the most recently assessed value for tax purposes, in the absence of a more current appraisal.

The location or description of the property should be sufficient to enable anyone who looks at the form to identify the property. A street address should be used, if one exists.

### **PART D — INTANGIBLE PERSONAL PROPERTY**

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

Describe any intangible personal property that, at any time during the disclosure period, was worth more than 10% of your total assets, and state the business entity to which the property related. Intangible personal property includes things such as cash on hand, stocks, bonds, certificates of deposit, vehicle leases, interests in businesses, beneficial interests in trusts, money owed you, Deferred Retirement Option Program (DROP) accounts, the Florida Prepaid College Plan, and bank accounts. Intangible personal property also includes investment products held in IRAs, brokerage accounts, and the Florida College Investment Plan. Note that the product contained in a brokerage account, IRA, or the Florida College Investment Plan is your asset—not the account or plan itself. Things like automobiles and houses you own, jewelry, and paintings are not intangible property. Intangibles relating to the same business entity may be aggregated; for example, CD's and savings accounts with the same bank.

Calculations: To determine whether the intangible property exceeds 10% of your total assets, total the fair market value of all of your assets (including real property, intangible property, and tangible personal property such as jewelry, furniture, etc.). When making this calculation, do not subtract any liabilities (debts) that may relate to the property. Multiply the total figure by 10% to arrive at the disclosure threshold. List only the intangibles that exceed this threshold amount. The value of a leased vehicle is the vehicle's present value minus the lease residual (a number which can be found on the lease document). Property that is only jointly owned property should be valued according to the percentage of your joint ownership. Property owned as tenants by the entirety or as joint tenants with right of survivorship should be valued at 100%. None of your calculations or the value of the property have to be disclosed on the form.

Example: You own 50% of the stock of a small corporation that is worth \$100,000, the estimated fair market value of your home and other property (bank accounts, automobile, furniture, etc.) is \$200,000. As your total assets are worth \$250,000, you must disclose intangibles worth over \$25,000. Since the value of the stock exceeds this threshold, you should list "stock" and the name of the corporation. If your accounts with a particular bank exceed \$25,000, you should list "bank accounts" and bank's name.

### **PART E — LIABILITIES**

[Required by s. 112.3145(3)(b)4, F.S.]

List the name and address of each creditor to whom you owed any amount that, at any time during the disclosure period, exceeded your net worth. You are not required to list the amount of any debt or your net worth. You do not have to disclose: credit card and retail installment accounts, taxes owed (unless reduced to a judgment), indebtedness on a life insurance policy owed to the company of issuance, or contingent liabilities. A "contingent liability" is one that will become an actual liability only when one or more future events occur or fail to occur, such as where you are liable only as a guarantor, surety, or endorser on a promissory note. If you are a "co-maker" and are jointly liable or jointly and severally liable, it is not a contingent liability.

Calculations: To determine whether the debt exceeds your net worth, total all of your liabilities (including promissory notes, mortgages, credit card debts, judgments against you, etc.). The amount of the liability of a vehicle lease is the sum of any past-due payments and all unpaid prospective lease payments. Subtract the sum total of your liabilities from the value of all your assets as calculated above for Part D. This is your "net worth." List each creditor to whom your debt exceeded this amount unless it is one of the types of indebtedness listed in the paragraph above (credit card and retail installment accounts, etc.). Joint liabilities with others for which you are "jointly and severally liable," meaning that you may be liable for either your part or the whole of the obligation, should be included in your calculations at 100% of the amount owed.

Example: You owe \$15,000 to a bank for student loans, \$5,000 for credit card debts, and \$60,000 (with spouse) to a savings and loan for a home mortgage. Your home (owned by you and your spouse) is worth \$80,000 and your other property is worth \$20,000. Since your net worth is \$20,000 (\$100,000 minus \$80,000), you must report only the name and address of the savings and loan.

### **PART F — INTERESTS IN SPECIFIED BUSINESSES**

[Required by s. 112.3145, F.S.]

The types of businesses covered in this disclosure include: state and federally chartered banks; state and federal savings and loan associations; cemetery companies; insurance companies; mortgage companies; credit unions; small loan companies; alcoholic beverage licensees; pari-mutuel wagering companies, utility companies, entities controlled by the Public Service Commission; and entities granted a franchise to operate by either a city or a county government.

Disclose in this part the fact that you owned during the disclosure period an interest in, or held any of certain positions with, the types of businesses listed above. You are required to make this disclosure if you own or owned (either directly or indirectly in the form of an equitable or beneficial interest) at any time during the disclosure period more than 5% of the total assets or capital stock of one of the types of business entities listed above. You also must complete this part of the form for each of these types of businesses for which you are, or were at any time during the disclosure period, an officer, director, partner, proprietor, or agent (other than a resident agent solely for service of process).

If you have or held such a position or ownership interest in one of these types of businesses, list the name of the business, its address and principal business activity, and the position held with the business (if any). If you own(ed) more than a 5% interest in the business, indicate that fact and describe the nature of your interest.

### **PART G — TRAINING CERTIFICATION**

[Required by s. 112.3142, F.S.]

If you are a Constitutional or elected municipal officer whose service began before March 31 of the year for which you are filing, you are required to complete four hours of ethics training which addresses Article II, Section 8 of the Florida Constitution, the Code of Ethics for Public Officers and Employees, and the public records and open meetings laws of the state. You are required to certify on this form that you have taken such training.

**(End of Percentage Thresholds Instructions.)**