

## **Community Development Districts**

**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

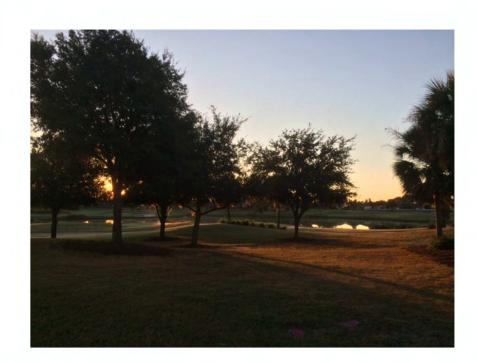
Purchasing (352) 751-6700

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.

DistrictGov.org

## **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 <u>CustomerService@districtgov.org</u>
- Bonds- 352-751-3900 or Bonds@districtgov.org
- Community Standards- 352-751-3912 or DeedCompliance@districtgov.org
- Customer Service- 352-753-4508 or <u>CustomerService@districtgov.org</u>
- Human Resources- 352-674-1905 or <u>HumanResources@districtgov.org</u>
- Recreation- 352-674-1800 or <u>RecreationDepartment@districtgov.org</u>
- Risk Management

   — 352-674-1828 or <u>RiskManagement@districtgov.org</u>
- Utilities- 352-750-0000 or <u>Utilities@districtgov.org</u>

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 Sumter County**

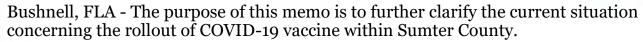
THE SUMTER COUNTY HEALTH DEPARTMENT ANNOUNCES UPDATE ON VACCINE AVAILABILITY

**Media Contact:** 

Megan McCarthy

Megan.McCarthy@FLHealth.gov

352-569-3134



In my press release of December 30th, I indicated that The Villages Health could vaccinate its most vulnerable patients now. That vaccine transfer did not occur. The reason for this change was my receipt of subsequent guidance that our local servicing hospital at The University of Florida should receive those doses, vaccinate their patient-exposed staff and develop a plan for vaccinating the broader public as more vaccines and become available. That vaccine transfer of 1,800 doses to the University of Florida is occurring now.

On a positive note, despite the various logistical challenges we are facing, we successfully vaccinated our first 280 enrollees today. Additionally, a similar vaccination event is planned for this Thursday and will be utilizing Eventbrite for registration. This will made available tomorrow, January 6th, at 8:00 AM for sign-up at the web address https://sumtercovidvax.eventbrite.com. Please also know our vaccine events are free of charge, Eventbrite nor the Sumter County Health Department will charge you for this. Please follow our website at https://Sumter.floridahealth.gov for future vaccination opportunities and registration information.

The protective actions I stressed in my press release of December 30th are the measures that are most protective in the short term. Particularly if you are medical vulnerable, please limit unnecessary in-door gatherings with neighbors or others, wear a mask if you have public activities you need to accomplish such as grocery shopping and wash your hands frequently. Limit unnecessary travel otherwise.

Thank you for patience during this challenging period.

Respectfully,

Sanford Zelnick D.O. M.S.

Director

Sumter County Health Department

\*\*\*

About the Florida Department of Health

The department, nationally accredited by the Public Health Accreditation Board, works to protect, promote and improve the health of all people in Florida through integrated state, county and community efforts.

Follow us on Facebook, Instagram and Twitter at @HealthyFla. For more information about the Florida Department of Health please visit www.FloridaHealth.gov.



## Frequently Asked Questions and Answers





**Community Development Districts** 

## How do I purchase a Veterans Memorial Brick?

Bricks are placed at the Veterans Memorial Park located near Spanish Springs Town Square, each Veterans Day — November 11th. All bricks must be purchased by March 31st each year to be included in that year's ceremony. All bricks purchased after March 31st will be included in the following year's ceremony. You can purchase a brick by completing the form on the next page and mailing the form with a check to 984 Old Mill Run, The Villages, FL 32162 or drop it in your amenity box with a check at the postal station. Bricks cost \$55.00. For a copy of the order form, see the next page or visit DistrictGov.org.





~~~~~~~~	*
* * * * * *	
*_*_*_*_*_	*
*[*[*[*]*]	*
* * * * *	•
	100

## Veterans Memorial Park Dedicated to Veterans - Past and Present

In 1998 a beautiful park was designed to pay tribute to the many men and women who have served their country and provided us with the most precious gift of all – freedom.

Bricks are designed to pay tribute to our loved ones who have served in one of the branches of the United States Armed Services. What better way to pay tribute than by furthering an endeavor that will have an impact today and in the lives of future generations?

## March 31, 2021 is the Deadline for the Dedication Ceremony on Veterans Day November 11, 2021

VETERANS MEMORIAL PARK ORDER FORM

ORDER PLACED BY (Pleas	se print):				
First Name	Las	st Name			
Address					
City	Sta	te	Zip		
Phone	Da	te of Order			
I certify that the information 1	below is to appear on the	brick as printed a	and is correct		
Choose One (M) or (H)	(M) In Memory	(H)	In Honor		
Print Name to be Engraved on Brick					
	First Name	Middle Initial	Last Name		
RANK WILL NOT BE INCLUDED					
	Information for E	Book_			
Rank:		Branch:			

Amount: \$55.00 (circle ane) Cash Credit Card Check Make checks payable to: <u>VCCDD</u>

Years of Service (example 1940-1948):

For additional information or order forms, please call District Customer Service at (352) 753-4508 or visit www.DistrictGov.org.

Forward order form and payment to: Village Community Development District 984 Old Mill Run The Villages, FL 32162

## **Information Provided By...**



## **COVID Guidelines Still in Effect**

The safety of residents, guests, staff and visitors in The Villages continues to be of utmost importance to the Recreation & Parks Department. The Recreation and Parks Department has decided to postpone the following programs until further notice.

- Lake Sumter Line Excursions- scenic cruises, guided kayak, nature pontoon and fishing tours
- Lifestyle Socials Sponsored by the Recreation and Parks Department Please contact a Resident Lifestyle Volunteer Leader regarding specific requirements for each club/activity.

Please see the next page for more details.

## **Growth Brings Changes**

With the continued growth Recreation & Parks Staff Members are moved around to manage the newest facilities. The most up-to-date staff directory can be round at <a href="https://www.districtgov.org/departments/Recreation/images/staff-directory.pdf?v=202006">https://www.districtgov.org/departments/Recreation/images/staff-directory.pdf?v=202006</a> or you may send inquiries to RecreationDepartment@DistrictGov.org.



## RECREATION FACILITIES & ACTIVITY UPDATE

Effective Until Further Notice

#### INDOOR FACILITIES:

Schedule by activity/club, Monday-Sunday; Facility Hours: 7:00 am - 9:00 pm

- The maximum capacity per group will be based on activity and type of setup at 50%, the capacity to be maintained by the group leader or based on room size. PLEASE keep a roster of all residents/guests who attend your club/group meetings.
- · Please remember to follow social distancing guidelines (keeping 6 feet away from others). If the distance is less than 6 feet, face masks are required.
- · Village residents/club members shall have priority.
- · Valid Villages ID cards or guest ID cards with photo. ID are required. When residents are waiting, guest use may be restricted due to space available to accommodate resident demand. ID scanners will be in use; please hold your own card.
- Continue to bring your own equipment & supplies.
- · Coffee pots, water, ice will not be available until further notice.
- · Kitchens may be used on a limited basis no warming/cooking/prepping. All serving dishes, plates, cups, utensils must be disposable.
- Fitness Clubs will remain at 50% capacity.
- Sanitation Stations will be provided; PLEASE clean equipment before & after each use.

### OUTDOOR COURTS & SWIMMING POOLS:

Hours of Operation:

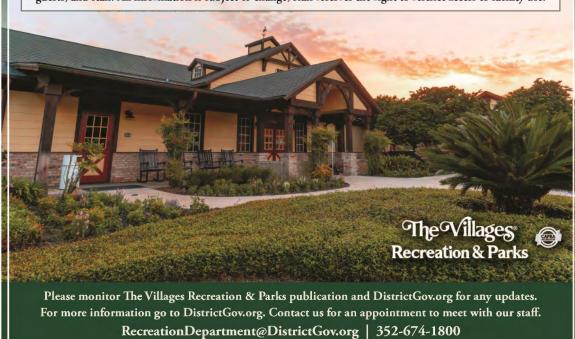
Courts & Sports Pools, 7:00 a.m. - Dusk, Daily Family & Adult Pools, 7:30 a.m. - Dusk, Daily

- · All courts and swimming pools will open up to 100% capacity.
- The Hilltop, Southside, Paradise, and Chula Vista swimming pools will continue to close at 9:00 pm.
- Water fountains will remain closed; please bring your own water bottle.
- Softball score booths will remain at one person per field.

#### **GENERAL INFORMATION:**

- · If you are sick, have a fever, cough, shortness of breath, have been recently exposed to COVID-19 or have COVID-19 symptoms, do not come to any recreation facility until your doctor has cleared you - STAY HOME! Be open, notify the recreation center.
- Be flexible as facility operations, attendance numbers, or services may be restricted, closed or limited.

We sincerely appreciate your patience and understanding as we continue to uphold the safety of our residents, guests, and staff. All information is subject to change, staff reserves the right to restrict access to facility use.



## **Information Provided By...**

# The Villages Community Development Districts Executive Golf

The Mangrove Executive Golf Course will close on Monday, January 25, 2021 until further notice for the renovation of the course timber bridge. This closure is part of an approved capital infrastructure improvement plan. We thank you for your patience during this time.



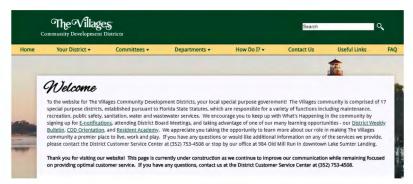


## DistrictGov.org

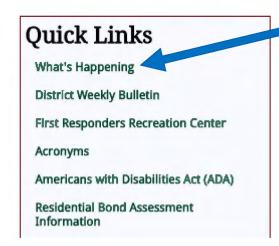


## Where can I find information about What's Happening in my District?

To find out about closings and maintenance in The Villages, go to DistrictGov.org.



Under Quick Links on the left hand side, click on What's Happening.



Here you will find general information and closing information.



## **GENERAL INFORMATION**

Atlas Canine Park & Sharon Rose Wiechens Preserve

In our efforts to keep the recreation facilities in optimal condition, the Atlas Canine Park and Sharon Rose Wiechens Preserve will be closed for maintenance Thursday, January 7, 2021 through Saturday, January 9, 2021. This schedule may be adjusted due to unforeseen circumstances, including weather. We apologize for the inconvenience. If you have any questions or need additional information, please contact the Rohan Regional Recreation Complex at 352-674-8400.





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

⇒ Atlas Canine Park and Sharon Rose Wiechens Preserve

The Atlas Canine Park and Sharon Rose Wiechens Preserve will be closed for maintenance January 7th through January 9th.

⇒ Chula Vista Recreation Center Indoor Facilities, Outdoor Facilities and Adult Pool

The Chula Vista Recreation Center Indoor Facilities, Outdoor Facilities and Adult Pool will be closed for maintenance on January 9th.

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

The Southside Recreation Center Indoor Facilities and Outdoor Facilities will be closed for maintenance on January 10th.

⇒ Silver Lake Recreation Center Indoor Facilities and Outdoor Facilities

The Silver Lake Recreation Center Indoor Facilities and Outdoor Facilities will be closed for maintenance on January 10th.

**⇒ Mulberry Grove Regional Recreation Complex** 

The Mulberry Grove Regional Recreation Complex will have the Spirit/Patriot and Liberty/Old Glory Rooms closed for maintenance January 4th through January 13th.

⇒ Coconut Cove Recreation Center Indoor Facilities, Outdoor Facilities and Family Pool

The Coconut Cove Recreation Center Indoor Facilities, Outdoor Facilities and Family Pool will be closed for maintenance on January 17th.

⇒ Virginia Trace Neighborhood Adult Pool

The Virginia Trace Neighborhood Adult Pool will be closed for maintenance until further notice.

⇒ Big Cypress Recreation Center

The Big Cypress Recreation Center will be closed for maintenance on January 16th.

⇒ Burnsed Recreation Center Billiards Room

The Burnsed Recreation Center Billiards Room will be closed for maintenance on January 21st.

## **Information Provided By The University of Florida IFAS Extension**

## **Lethal Bronzing: A Destructive New Palm Disease**

Lethal Bronzing, previously called Texas Phoenix Palm Decline, is a relatively new bacterial disease (called a phytoplasma) that is causing significant palm losses in Palm Beach County, and throughout much of Florida. It is believed to have originated in the Yucatan Peninsula of Mexico and may have been carried to Florida in the salivary glands of a tough insect vector by Hurricane Wilma. The disease was first found in Florida in 2006 and initially followed the path Hurricane Wilma had taken the previous year. Symptoms are similar to lethal yellowing, but currently are known to affect a much smaller number of palm species. A few palm species are known to be susceptible to both diseases.

The colonized and then damaged vascular system (phloem tissue) of the palm leads to wilting, and eventually death. University of Florida/IFAS research is determining which sap feeding insect(s) may spread it. The one confirmed so far is *Haplaxius crudus*, a planthopper and palm sap feeding insect, also known as the American palm cixiid. It spends most of its life cycle in the soil and only emerges as an adult to mate and feed on palm fronds.

Palms currently known to be affected by lethal bronzing (as of May 2019) include Christmas Palm, Bismarck Palm, Pindo Palm, Carpentaria Palm, Coconut Palm, Chinese Fan Palm, Canary Island Date Palm, Edible Date Palm, Pygmy Date Palm, Wild Date Palm, Fiji Fan Palm, Buccaneer Palm, Mexican Palmetto, Cabbage Palm, Queen Palm, and Chinese Windmill Palm. Undoubtedly this list of susceptible palms will grow now that the disease has been detected in Miami-Dade County, where Florida's richest diversity of palm species are found.

## **Symptoms**

If flower spikes are on the palms, they tend to turn black and die. If any fruit, it usually drops prematurely. Later, symptoms begin with the older, lower fronds sometimes turning a subtle bronzish (looks more reddish-browngrayish to some) before they turn fully grey and die. The central spear leaf usually dies by this time. Symptoms progress over about a 4-5 month period before the palm is completely dead.

## **Information Provided By The University of Florida IFAS Extension Continued**

However, single trunk palms are effectively dead once the spear leaf or leaves die, even if there are still some green lower fronds. Symptoms are often confused with nutrient deficiencies like potassium, or Fusarium fungal wilt on susceptible palms. Potassium deficiency can be distinguished from lethal bronzing because the potassium usually takes multiple years of deficiency between symptoms first appearing and palms dying.

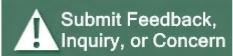
## What Can You Do?

The disease is confirmed by laboratory analysis of tissue extracted from the trunk. Remove and dispose of infected symptomatic palms so they cannot serve as an inoculum source for other surround susceptible palms. Administer antibiotic injections to non-symptomatic susceptible species growing around removed palms. Inject oxytetracycline at **3 grams** per palm (**1 gram** for small species like Christmas or pygmy date palms). Repeat injections every three months for at least two years. The oxytetracycline may not be adequate to save palms already showing symptoms. This is particularly true if the spear leaf or leaves are already dead.

Additional information and photos can be found in the UF/IFAS publication <u>Lethal Bronzing Disease</u>.



## Frequently Asked Questions and Answers





## How many calls a day does Community Watch Dispatch answer?

Nearly 900 calls are answered a day by Community Watch Dispatch. The 18 Dispatchers and 4 Supervisors are split into four shifts. Each shift is 12 hours to complete 24-hour coverage. On holidays, weekends and nights, when most District offices are closed, Community Watch Dispatch assists other departments in providing information to help residents resolve inquiries and concerns.

Community Watch Dispatch receives calls from residents that range from simply needing directions to calls for immediate assistance. Our Dispatchers answer the calls with the assistance of a "Dashboard", which is an electronic database that has a multitude of procedures at the Dispatcher's fingertips. This assists them in answering questions based on what type of call they are handling.

Dispatchers work hand in hand with the Community Watch Patrol Drivers by giving them the information needed to assist anyone that calls or to receive and report what the Patrol Driver observes during patrol routes.

Community Watch Dispatch is open 24 hours a day, 7 days a week, 365 days a year! They are always willing to help residents of The Villages with any inquiries, issues or concerns that may arise. Community Watch Dispatch can be reached at 352-753-0550.





## **Gate Safety**

While traveling through The Villages, you will have to pass through one of the 109 (and growing!) gate areas. 22 of these gates are staffed with attendants who are there to greet all who enter and to assist the visitor lane. The gates serve a valuable purpose to our community by slowing traffic coming off of higher speed roads. Each gate area is a 5 MPH zone. When motorists slow down, stop and then wait for the gate to open, it allows the golf cars, walkers and cyclists to safely cross in these areas. Additionally, the vehicles are slowing down from their typical speed, as they are entering the residential areas and allowing them to be more aware of their surroundings.

## Some gates have one lane, allowing one vehicle (bike, golf cart or pedestrian) to enter at a time.

- $\Rightarrow$  The speed in each gate area is **5 MPH**.
- ⇒ All entering vehicles should make a <u>complete stop at the gate house or the card</u> <u>reader.</u>
- ⇒ You may press the red button or swipe your gate card to raise the gate arm.
- ⇒ Always wait for the gate arm to extend <u>all the way up</u> and then pass through.
- ⇒ For your safety, each vehicle (golf car, bike or pedestrian) should <u>wait for gate</u> arm to come down from the previous cycle, before pressing button or swiping card.
- ⇒ Make sure the gate responds to you pressing the button or swiping your card.

  Never go by the beep or the light of the card reader and never drive forward without seeing the gate arm extending completely up.
- ⇒ Never follow closely behind another vehicle, bike or golf cart that activated the gate arm.
- ⇒ The gate arm closes after each vehicle and will attempt to come down after the sensor is triggered by the passing of the vehicle that activated the gate arm.



## Many gates have two lanes, the left lane is for "visitors" and the right is for "residents".

- ⇒ The gate attendant <u>only controls the visitor lane</u>. They are also there to welcome all who pass in the two lanes. If you are in need of directions, the gate attendant can help.
- ⇒ If entering in the visitor lane, always stop at the gate house and wait for the attendant to signal you through.
- ⇒ If there is no attendant, a card reader is available for you to **press the red button**.
- ⇒ If you are a visitor and find yourself in the resident lane, there is a red button located on the card reader that will allow you to enter.
- ⇒ Once the gate arm is up, pass through the gate area and do not stop to allow golf carts to cross the roadway. Vehicles entering or exiting on the roadway have the right of way not the vehicles or pedestrians on the multimodal path that crosses the roadway. By stopping and allowing them to cross the roadway, you may cause an accident or you may cause damage to your car if you have passed the sensor that tells the gate arm to lower.

## Accidents happen!

- ⇒ When an incident occurs at the gate, contact Community Watch so they can repair the gate arm. Community Watch will take your information or direct you to Risk Management.
- ⇒ It is illegal to not report damage to property.



Community Watch— 352-753-0550 Risk Management— 352-674-1828



- $\Rightarrow$  All gate areas have 24/7 camera surveillance.
- ⇒ There is an average of 85 gate hits a month and many go unreported.
- ⇒ Gate damage incidents that are not reported are reviewed by law enforcement, information exchanges are provided and the District invoices the party responsible.
- ⇒ The minimum fee for damage to a District gate is \$250 per Board Resolution 17 -08.

Fact: The majority of golf cart gate hits go unreported and the District is unable to collect for damage done by all those who choose not to report.

## YOU CAN HELP!!

Remember: the number of gate hits could be reduced if everyone made an effort to:

- Slow down in entry gate areas.
- Reduce your speed to 5 MPH when exiting gates and make sure the gate arm is extended before exiting.
- Always make a complete stop and then press red button or swipe card when entering.
- Wait for the gate arm to extend up all the way before transiting.
- Wait for the gate arm to come back down before activating the gate to open again.
- · Never piggyback on the vehicle ahead of you.
- Never attempt to go around the arm when it is lowering or when it is fully lowered (such as bicycles or scooters).



## **Information Provided By...**





## Too much irrigation...

- Makes your lawn less able to survive droughts
- Encourages pests and disease
- Wastes water

## How much is enough?

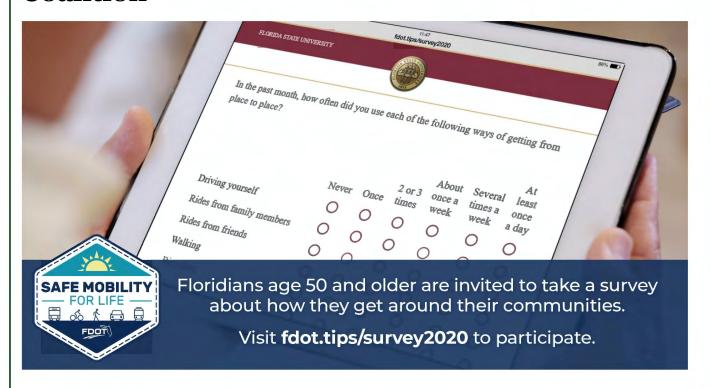
- Grass doesn't need as much water in the cooler months
- Apply 1/2" to 3/4" of water
- Water only every 10-14 days in the winter

## Your lawn needs watering when:

- Grass blades are folded in half
- Grass blades are blue-gray
- Your footprint remains on the lawn

So skip a week of watering — it just makes sense!

## **Information Provided By Safe Mobility for Life Coalition**



Are you a Florida resident aged 50 or older? If so, we'd like to learn more about how you get from place to place in your daily life. The Safe Mobility for Life Survey is being conducted by Florida Department of Transportation's Safe Mobility for Life Program/Coalition and Florida State University's Pepper Institute on Aging and Public Policy. The survey, which takes about 15 minutes, asks about your driving habits and use of other types of transportation, as well as various factors that may affect them. We will not record your name or any other information that shows your identity. Your participation in this study will help us better understand the transportation needs of Floridians.

To take the survey, click here: <a href="fdot.tips/survey2020">fdot.tips/survey2020</a>

If you have any questions about this study, please contact Dr. Anne Barrett at FSU Pepper Institute on Aging and Public Policy (<a href="mailto:abarrett@fsu.edu">abarrett@fsu.edu</a>).

On behalf of the Safe Mobility for Life Coalition, thank you for helping keep Floridians safe and mobile.

## **Information Provided By...**



## A Note from the Finance Customer Service Team:

We recently changed our remittance address for the Utilities bills. If you are making payments via your banks online bill payment service, please update the mailing address to which you submit your monthly payment for your utility and amenity billing.

From:

984 Old Mill Run

The Villages, FL 32162-1675

(This address remains for all other District correspondence.)

To:

P.O. Box 2230

The Villages, FL 32158-2230

(For payments only.)

Please ensure that your check is made payable to: VCSA, LSSA, NSU, CSU or SSU and that your account number is referenced in this format: A123-1234-12

Please correct this information on your banks website to avoid delays in payment receipt and processing.

If you have any questions, please contact the Finance Customer Service Department at <a href="Utilities@DistrictGov.org">Utilities@DistrictGov.org</a> or at 352-750-0000.

## **Tunnel Closures**



## **Tunnel Closures**

The multi-modal path tunnels located under Buena Vista Boulevard and El Camino Real are scheduled to be painted January 4, 2021 through January 17, 2021. These dates may be adjusted due to unforeseen circumstances, including weather.

All work is scheduled between 9:00 p.m. and 5:00 a.m. There will be short periods during the night where the tunnels will be closed and an alternate route must be taken.

B1 - 16680 Buena Vista Blvd (Buena Vista/Mulberry)

B4 - 1700 Buena Vista Blvd (Buena Vista/Belle Aire/Alhambra)

B2 - 17200 Buena Vista Blvd (Buena Vista/Legacy)

B5 - 2890 El Camino Real (El Camino/Alhambra/Savannah)

B3 - 17700 Buena Vista Blvd (Buena Vista/Belle Meade)

B6 - 1530 Buena Vista Blvd (Buena Vista/Savannah)

Everything possible will be done to minimize your inconvenience. For the SAFETY of our crews and all residents, we ask that you please use caution and pay attention to all signage.

Your cooperation is greatly appreciated. For additional information, please contact District Property Management at (352) 753-4022.

## **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 <u>alternate applicant</u> 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.



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

### APPLICATION FOR MEMBERSHIP

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

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.

Please briefly describe your past busines					
2. What special skills or education do you have that would benefit the ARC? (Please includes special skills, experience or training such as architect, ability to read site plans, builder, condo/building management, working with deed restricted communities, etc.)					
Are you familiar with your deed restriction	ns and/or covenants? Y	N.			
Signature	Phone				
Print Name	Village of				
Address_	Date				

Village Community Development Districts 984 Old Mill Run,The Villages, Florida 32162 Business Phone: 352-751-3912 Business Fax: 352-751-6707

## 2019 FORM 1 STATEMENT OF FINANCIAL INTERESTS 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 **DOLLAR VALUE THRESHOLDS** OR 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 DESCRIPTION OF THE SOURCE'S SOURCE'S PRINCIPAL BUSINESS ACTIVITY OF INCOME **ADDRESS** 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 NAME OF MAJOR SOURCES ADDRESS PRINCIPAL BUSINESS **BUSINESS ENTITY** OF BUSINESS' INCOME OF SOURCE ACTIVITY OF SOURCE PART C -- REAL PROPERTY [Land, buildings owned by the reporting person - See instructions] You are not limited to the space on the (If you have nothing to report, write "none" or "n/a") 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 [Sto (If you have nothing to report, write "none	ocks, bonds, certificates of deposit, etc See instructions] e" 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			
NAME OF CREDITOR	ADDRESS OF CREDITOR		
(If you have nothing to report, write "none"	Ownership or positions in certain types of businesses - See instructions] or "n/a") BUSINESS ENTITY # 1 BUSINESS ENTITY # 2		
NAME OF BUSINESS ENTITY			
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 and	nual ethics training pursuant to section 112.3142, F.S.  HAVE COMPLETED THE REQUIRED TRAINING.		
IF ANY OF PARTS A THROUGH G ARE	CONTINUED ON A SEPARATE SHEET, PLEASE CHECK HERE		
SIGNATURE OF FILE Signature:	R:  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		
Date Signed:	instructions to the form. Upon my reasonable knowledge and belief, the disclosure herein is true and correct.  CPA/Attorney Signature:  Date Signed:		
Date Signed:  FILING INSTRUCTIONS:	disclosure herein is true and correct.  CPA/Attorney Signature:		

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 filling 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 <u>not</u> 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:

- 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.
- 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 Roard
- 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.
- 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 Attomeys, 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, <u>and contact your agency's financial disclosure coordinator</u>. You can find your coordinator on the Commission on Ethics website: www.ethics.

**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 hold, are seeking, or held during the disclosure period <u>even if you have since left that position</u>. 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. <u>Your Social Security Number is not required and you should redact it from any documents you file.</u> 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 <u>if you submit a written request</u>.

### MANNER OF CALCULATING REPORTABLE INTEREST

Filers have the option of reporting based on <u>either</u> thresholds that are comparative (usually, based on percentage values) <u>or</u> 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. <u>You must use the type of threshold you have chosen for each part of the form.</u> 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 <u>each individual company</u> 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, prokerage 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.)