

**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



Sharon Rose Wiechens Preserve

## 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.**

# Frequently Asked Questions and Answers



Submit Feedback,  
Inquiry, or Concern

## The Villages® Community Development Districts Property Management

Mike Harris, Assistant Director of District Property Management answers Frequently Asked Questions about The Villages Wetlands.

### **Do you know how many acres of water retention and wetland areas we have in The Villages?**

1,400 acres of water retention areas and 2,700 acres of wetlands

### **What are wetlands?**

Wetlands are defined in Title 33 of the Code of Federal Regulations Part 328 (33 CFR 328) as *“those areas that are inundated or saturated by surface or ground water at a frequency and duration sufficient to support, and that under normal circumstances do support, a prevalence of vegetation typically adapted for life in saturated soil conditions. Wetlands generally include swamps, marshes, bogs, and similar areas.”*



### **Why are wetlands important to The Villages?**

- Benefit storm water management by collecting and storing runoff  
To learn more about storm water management, please click on the following link to view the video and supporting resources from the 2018 District Storm Water Workshop - <https://www.districtgov.org/community/district-workshops.aspx>.
- Store floodwaters to prevent flood damage
- Filter and remove pollutants such as nitrogen and phosphorus
- Provide food, water and shelter for wildlife (some of which are protected)
- Provide habitats for flora and fauna

# Frequently Asked Questions and Answers

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



Submit Feedback,  
Inquiry, or Concern

## **Who regulates these areas and who is the permittee?**

Permits are issued by The Southwest Florida Water Management District and the Army Corps of Engineers.

The permits are closely monitored by the District's contracted environmental consultants.

## **Where can I find wetlands in The Villages?**

We currently own and manage 83 wetlands. The most accessible of these are:

Sharon Rose Wiechens Preserve- District 11

Reader Preserve- District 12

Hog-eye Preserve- District 12

Chitty Chatty Preserve- District 13.



## **What are the differences between wetlands that are public with trails as opposed to those that are not public with walls and fences along private property?**

In many cases, the wetland or upland buffer area extends directly up to a fence or wall creating a visual delineation of the permitted areas. For nature trails and walkways on District property, those improvements and associated maintenance are included in the permit conditions and maintained in accordance with those requirements. For wetland or associated upland buffer areas adjacent to private property there are no provisions for encroachments or clearing upon District property by others and the District does not maintain these areas for private property viewshed.

## **Is cutting or trimming of vegetation allowed in The Villages wetlands?**

No. Cutting or trimming of vegetation is illegal and may result in criminal actions or fines.

## **Did you know that you can find information about Sanitation & Recycling Information and Schedules on DistrictGov.org?**

Visit [www.DistrictGov.org](http://www.DistrictGov.org).

Under Community Corner on the right hand side of the page, click on Curbside Residential Sanitation Collection button.

### Community Corner



On this page, you will find the Curbside Residential Sanitation Collection Information for the area in which you reside.

## **Curbside Residential Sanitation Collection Information**

In an effort to maintain the aesthetic quality of our beautiful community, we are pleased to provide you with information regarding trash collection, curbside recycling and the disposal of household hazardous waste.

Sanitation services are a contractual provision of your declaration of restrictions and are charged to Village Residents on a year round basis irrespective of whether or not the home is occupied. The charge for sanitation services will continue to appear on your monthly combined bill that is sent by the VCDD Utility Billing and Customer Service Division for your respective utility service area.

The Sanitation and Recycling information is provided below based on the area in The Villages in which you live. If you have any questions about this information or need assistance determining which information applies to your home, please contact the District Customer Service Center at (352) 753-4508.

**[Curbside Residential Sanitation Collection Information](#)**

## CR-42 SOUTH TO CR-466



**MONDAY & THURSDAY**

Belle Aire *Harmswood Meadow Lawn Ln Nbhhd. South Belle Aire Briar Meadow Calumet Grove Chatham Cottages at Summerchase Glenbrook*

Mulberry Grove Phillips Villas Piedmont Polo Ridge Soulliere Villas Springdale Summerhill Woodbury

## CR-466 SOUTH TO CR-466A



**MONDAY & THURSDAY**

Ashland *Except Lockwood Lp*  
Bonnybrook *Castleberry Circle*  
Bridgeport at Lake Miona  
Bridgeport at Lake Sumter  
Bridgeport at Miona Shores & Laurel Valley  
Buttonwood  
Caroline  
Lake Shore Cottages  
Mallory Square *N of Odell & N of Stillwater Trail*

Mission Hills  
Pennecamp  
*W of Amberjack Terr on S of St. Charles Pl & W of Kingfisher Ct on Triggerfish Run*  
Poinciana  
*N of St. Charles Pl*  
St. James  
Sunset Pointe  
Tamarind Grove  
Virginia Trace  
Winifred

## CR-466 SOUTH TO CR-466A



**TUESDAY & FRIDAY**

Amelia  
Ashland *Lockwood Lp*  
Belvedere  
Bonita  
Bonnybrook  
Duval  
Hadley  
Hemingway  
Largo  
Liberty Park

Lynnhaven  
Mallory Square *S of Odell & S of Stillwater Tr*  
Pennecamp *E of Amberjack Terr & N of St. Charles Pl, E of Kingfisher Ct on Triggerfish Run*  
Poinciana *S of St. Charles*  
Sabal Chase  
St Charles  
Tall Trees

## CR-466A SOUTH TO SR-44



**MONDAY & THURSDAY**

Charlotte  
Dunedin  
*S of Hillsborough Tr, E of Valleybrook Way*  
Fernandina  
*E of Anna Maria Ave*  
Gilchrist  
*N of Pinellas Pl & E of Dajoe Terr*

Hyde Park  
Labelle  
Osceola Hills  
Osceola Hills at Soaring Eagle  
Preserve  
Pine Hills  
Pine Ridge  
Sanibel

## CR-42 SOUTH TO CR-466



**TUESDAY & FRIDAY**

Alhambra  
Belle Aire *Harmswood Avalos Dr Neighborhood North*  
De Allende  
De La Vista  
Hacienda  
Palo Alto

Rio Grande  
Rio Ponderosa  
Rio Ranchero  
Santiago  
Santo Domingo  
Tierra Del Sol

## CR-466A SOUTH TO SR-44



**TUESDAY & FRIDAY**

Collier  
Dunedin *S of Hillsborough Tr, W of Valleybrook Way & N of Hillsborough Tr*  
Fernandina  
*W of Anna Maria Ave*

Gilchrist  
*Except N of Pinellas Pl & E of Dajoe Terr*  
Hillsborough  
Lake Deaton  
Pinellas

## SOUTH OF SR-44



**MONDAY & THURSDAY**

Bradford  
Hawkins

Chitty Chatty  
St. Catherine

## SOUTH OF SR-44



**TUESDAY & FRIDAY**

Fenney  
DeSoto  
Marsh Bend

McClure  
Linden  
Monarch Grove  
DeLuna

## TOWN OF LADY LAKE AND UNINCORPORATED LAKE COUNTY

Waste Management is the sanitation service provider for the residents that reside in the Town of Lady Lake portion of The Villages. Waste Management bills those residents directly.

Waste Management  
Billing or Pickup Questions: 352-787-4416

Lake County Solid Waste provides services to those residents residing in the Lake County portion of The Villages. *(not including VCDD No. 11)*

Lake County Solid Waste  
Billing or Pickup Questions: 352-343-3776

**The Villages®**  
Community Development Districts

## CURBSIDE RESIDENTIAL SANITATION COLLECTION INFORMATION

Guidelines for Sanitation Collection in The Villages® Community



Residents can make an impact by participating in sanitation programs!

Contained in this guide are the acceptable and non-acceptable material lists, along with contact information to learn more.

The sanitation information provided is based on the area of The Villages® where you reside. If you have any questions about this information or need assistance determining which information applies to your service, please contact the District Customer Service Center at 352-753-4508.

[DistrictGov.org](http://DistrictGov.org)

# THE VILLAGES COMMUNITY DEVELOPMENT DISTRICTS

*Sumter County, Marion County & The Villages of Fruitland Park*

Household sanitation collection processes have been streamlined, both for your convenience and for the preservation of our environment and natural resources. By having more efficient services, we reduce the carbon footprint, reduce wear and tear on roads, use less fuel and minimize traffic in your neighborhood. All waste, both household and yard waste, will

now be collected on your 2 scheduled pick up days (there is no longer a separate day for yard waste).



## QUESTIONS?

For questions about routes, schedules and trash collection, please call Sumter Sanitation at 352-748-0109.

For questions regarding billing, call District Finance Customer Service at 352-750-0000. For more information visit [DistrictGov.org](http://DistrictGov.org).



## HOUSEHOLD WASTE

All household waste should be placed in a sealed tall kitchen trash bag or 20-30 gallon trash bag (any color). All materials can be placed in the same bag, no need to sort! The trash bags should be placed together at the end of your driveway, no garbage cans are allowed. Each bag should weigh no more than forty (40) pounds. Bags must be placed for collection before 6:00 a.m. on your collection day or the night before (no sooner than 5:00 p.m.) Collection times may vary. Deed Restrictions do not allow leaving trash out on undesignated days. Wrap broken glass or other sharp objects in newspaper and place them where they cannot cause injury. For a list of holidays that may affect your normal collection day, please visit [DistrictGov.org](http://DistrictGov.org).

## BULK PICK UP

Items that are too large to be collected by the compactor trucks can be scheduled in advance by calling for a bulk pick up.

For those residents north of S.R. 44, please call 352-748-0109 for scheduling. There will be a \$10 charge added to your utilities and amenities bill each time a bulk pick up is requested. Charges will apply for any scheduled pick up not canceled a minimum of 24 hours in advance of the scheduled date.

For those residents residing south of S.R. 44, please call 352-750-0000 for scheduling.



## HOMEOWNER YARD WASTE

Tree limbs or branches may not exceed 4' in length, 4" in diameter or exceed 40 pounds. Bundle and tie such materials and place them at the end of your driveway. Lawn clippings and similar yard waste should be placed in lawn and leaf bags or 20-30 gallon trash bags.



The following **WILL NOT** be accepted:  
Dirt, Rocks, Sod,  
Concrete, Contractor Waste

## ENERGY FROM WASTE

All waste is transported to the Lake County Covanta Energy from Waste (EFW) Facility. Household waste or mixed solid waste (MSW) is turned into energy which is then transferred to the energy grid. Every 1 ton of MSW managed at the Covanta EFW facility offsets approximately 1 ton of greenhouse gas (GHG) emissions. Covanta's EFW facilities typically operate at 60-80% better than Federal and/or State permitted emission limits. The EFW facility has advanced air pollution control and are highly regulated to protect the environment.

*For residents of The Villages residing South of State Road 44, sanitation services are provided and delivered to Covanta by Tri-County Sanitation. For residents living in the Town of Lady Lake portion of The Villages, sanitation services are provided and delivered to Covanta by Waste Management.*

## LAKE COUNTY COVANTA EFW FACILITY FACTS

- Facility processes a total of 528 tons per day of MSW.
- Generates up to 14.5 megawatts of clean, renewable energy daily.
- Utilizes Air Pollution Control Equipment of semi-dry flue gas scrubbers injecting lime, fabric filter baghouses, nitrogen oxide control system, mercury control system and continuous emissions monitoring system.
- The EFW system is comprised of two 264 ton-per-day waterfall furnaces with Martin reverse-reciprocating grates and ash handling system.
- Designated a Voluntary Protection Program Star Facility by the U.S. Occupational Safety and Health Administration (OSHA) for workplace safety.

## MATERIALS NOT ACCEPTED

**DO NOT PLACE HYPODERMIC NEEDLES, HOSPITAL TYPE MEDICAL WASTE, PAINT, OIL, LAWN OR POOL CHEMICALS, MOTOR OIL OR TIRES IN YOUR HOUSEHOLD GARBAGE.** Amnesty days at designated locations are held several times a year. Contact District Customer Service at 352-753-4508 for scheduled times and locations.

## QUESTIONS?

Contact the District Finance Customer Service Department at 352-750-0000 for collection and billing information. For an escorted tour of the Covanta Facility, please call 352-365-1611. Proper attire is required.

## Information Provided By...

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



### **Recreation Room Use**

Any unused room may be reserved any time within 24 hours. If requesting a pre-set room, the room must be put back to its original setup. If requesting a banquet room, minimal setups may be provided. Setups for these rooms are limited to staff availability and up to 2 tables with 16 chairs. These items are not provided: audio visual including televisions and video equipment, podiums and computers. Table Tennis will be set up on request in available meeting rooms. Card rooms are preset. We will allow use of 1 wired mic, based on availability, in addition to the items listed.

The intent of this service is to provide limited, infrequent use by residents and resident lifestyle volunteer groups. The maximum allotted time is 3.5 hours. Call the recreation center you wish to use for further information.

### **Lost and Found**

Depending on where items are found, inexpensive items will be held for one month at La Hacienda, Laurel Manor, Eisenhower and Everglades Regional Recreation Complexes. Valuables will be turned over to the Lady Lake Police Department, Sumter County Sheriff's Office or Marion County Sheriff's Office within 72 hours. At the end of each month, unclaimed items will be donated to local charities. The Recreation and Parks Department is not responsible for lost items. Please see the following page for the guidelines.





# Information Provided By...

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



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



## **Lost & Found Guidelines The Villages Recreation Department**

All items estimated to be valued under \$50.00 (non-valuable items) will be sent to the following lost and found locations:

- La Hacienda Regional Recreation Center (north of 466), 753-1716
- Laurel Manor Regional Recreation Center (south of 466), 751-7110
- Eisenhower Regional Recreation Center (south of 466A), 674-8390
- Everglades Regional Recreation (south of 44), 674-8434

All items estimated to be valued over \$50.00 (valuable items) including but not limited to: gold, jewelry, golf clubs, wallets, purses, electronics (including digital cameras, cell phones, tablets/computers) or other expensive items will be turned over to the appropriate law enforcement agency within 72 hours.

- Lake County Sheriff 352-343-2101
- Lady Lake Police Department 352-751-1560
- Marion County Sheriff 352-753-2211
- Sumter County Sheriff 352-569-1600
- Wildwood Police Department 352-330-1355
- Fruitland Park Police Department 352-360-6655

When items are found at any of The Villages Recreation Facilities the following steps will take place:

1. If an individual claims an item he/she is to fill out the Recreation Department Lost & Found Claim Form. Claim report forms will be kept on file at the facility RSR's desk for a period of 6 months.
2. No items are to be released without a photo ID, signature and phone number.
3. After the end of each month all remaining items will be donated to a local charitable organization as designated by the District. The Recreation & Parks Dept. has partnered with The Villages Auxiliary Hospital; which is a non-profit, charitable organization that serves our community.

Note: The Recreation & Parks Department takes no responsibility for items left in the Recreation Centers or turned over to Law Enforcement.

# Information Provided By...

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



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



## Weather Policy for Recreation Facilities

**Purpose:** To provide consistent and uniform guidelines for creating awareness and communication to staff and participants regarding inclement weather that may impact the public, health, safety and well-being of staff, volunteers, participants and facilities.

**Guidelines for Recreation Facilities:** The following guidelines are recommended for recreation sponsored activities, leagues, tournaments, and special events.

The Recreation Department has the right, as issued by the National Weather Service, Public Safety, or Recreation Department in the event of tornadoes, hurricanes or other severe storm watch/warning, weather conditions to close facilities and/or cancel/postpone or relocate activities at Recreation facilities for public safety.

Cancellations, postponements and relocation of activities will be done in a timely manner. Sponsored activities will be cancelled/postponed a minimum of thirty minutes to one hour before scheduled play time depending on type of activity. Emergency alert warning may require sooner cancellations.

**Notification Process:** Depending on the type of weather event and impact, staff will communicate via email, word of mouth, posting on website or other media sources regarding information. Weather condition and type of facility may vary from center to center in the community.

**Inclement Weather:** Defined as rain, wind, lightning and/or severe conditions (tornado, hurricane, thunderstorm watch/warnings) that compromise the safety of the participants, staff, volunteers and/or the condition of the facility.

- In the event on Inclement weather, the Recreation Department recommends patrons at outdoor recreation areas find shelter and wait at least 30 minutes or longer as deemed necessary by Public Safety or National Weather Service Advisory prior to resuming safe normal activities.

**Weather Temperature:** Cancellations/postponements related to Temperature

### Temperature Guidelines

- Outside temperature of 35 degrees or lower
- Outside temperature heat index of 104 or higher

### Protocol

- District Staff will monitor weather conditions through various media sources that include but are not limited to WVVG and wunderground.com (La Zamora station)
- District Staff (on-site recreation staff i.e. athletic/recreation assistant) will receive direction from department manager or supervisor if cancellation/postponements process is recommended based on the above guidelines.

# Information Provided By...



## Process

- District Staff (on-site recreation staff i.e. athletic/recreation assistant) will notify activity representatives and/or participants via phone and/or in person that the recreation sponsored event(s) is recommended to be cancelled/postponed until further notice
- District staff will notify activity representatives when temperature resumes to safe conditions and play can continue.

## **Funshine Bingo**

Funshine Bingo will be cancelled 30 minutes prior to the start time of the bingo cards being sold based on the following:

- Outside temperature of 50 degrees or lower.
- Outside temperature heat index of 104 or higher
- Rain, wind, lightning and/or severe conditions (tornado, hurricane, thunderstorm watch/warnings) that compromise the safety of the participants or the condition of the facility.

## **Swimming Pools**

- Recreation staff will be in charge of Family & Sports pools that are on-site
- Neighborhood Adult pools off site and other outdoor recreation areas will be self-monitored,
  - ▶For those pools scheduled for 90 minute pool checks, staff is to clear the swimming pool and wait the allotted 30 minutes for the weather to clear. If weather does not clear, staff is to notify their manager and leave.
- Recreation staff and Community Watch staff, in the area during inclement weather, will use their best judgment to encourage and inform patrons to leave the pool or outdoor recreation areas if they deem necessary.
- If pool temperatures drop below 81 degrees, a sign will be posted at the entrance of the pool informing residents of the temperature change. The pool will remain open.

Cancellations will occur for the following reasons:

- Outside temperature of 35 degrees or lower
- Rain, wind, lightning and/or severe conditions (tornado, hurricane, thunderstorm watch/warnings) that compromise the safety of the participants or the condition of the facility.

## **Lake Sumter Line – Boat Tours, Pontoon Boat Tours, Fishing Excursions, and Kayaking**

Cancellations due to inclement weather will be made by the recreation staff in charge of the boats an hour prior to the first scheduled trip.

Cancellations will occur for the following reasons:

- **Air Temperature Policy:**
  - ❖ If the forecast temperature for 12:00 noon will be below 50°F, cancel operations.
  - ❖ If the forecast temperature for 12:00 noon will be between 50°F and 55°F, the decision to cancel will be at the discretion of scheduled Captains.
  - ❖ During summer, if the forecast heat index for 12:00 noon will be 95° or higher, cancel operations.
  - ❖ If the decision is to cancel operations, all scheduled crew are to be advised no later than 60 minutes prior to the scheduled start time (earlier if possible).

# Information Provided By...



- **High Wind Policy:**
  - ❖ If high winds are present (above 17 mph), suspend operations.
  - ❖ If medium winds are present (10-16 mph), operate at Captain's discretion.
  - ❖ (Wind speed measurements are approximate based on best available information.)
  - ❖ If very high winds (above 50 mph) have been forecast, boats are to be retied in a "sprung out" format to avoid contact with dock and/or sea wall.
- Rain, wind, lightning and/or severe conditions (tornado, hurricane, thunderstorm watch/warnings) that compromise the safety of patrons, staff and the conditions of boats and docks.

## **Open Play & Resident Sponsored Activities**

Participants assume full responsibility for any risk of bodily injury arising out of or any way connected with participation or involvement in or presence at the activity or program. For the safety and well-being of the public, the Recreation Department may close facilities at any time due to weather conditions.

## **Rain Delays**

If it is raining before the start of play and stops before the scheduled play time, play will continue as planned if the fields/courts are deemed playable. If rain continues into the scheduled play time, recreation staff/volunteer may invoke a rain delay. After a reasonable amount of time, staff will decide if the weather has improved and is suitable for play or if the activity should be declared a rainout.

**Inside facilities** will be closed as directed by the Director of Recreation.

## **Disclaimer**

If at any time facility/field conditions or weather conditions are deemed unsafe, the District Recreation Department reserves the right to cancel or postpone any activity. At all times participants play at their own risk.

*For further information and complete activity schedules please visit [www.districtgov.org](http://www.districtgov.org), check the Recreation News, the Bulletin boards at each facility or call your nearest Recreation Center.*

## Information Provided By...

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

It is the time of year when we will see the roads most congested while people flock to the beautiful Florida winter weather. This time of year, and always, it is important to drive defensively. Defensive Driving is essentially driving in a manner that utilizes safe driving strategies to enable motorists to address identified hazards in a predictable manner.

### **Traffic Crashes**

Losses from traffic crashes have both social and personal impacts. Approximately 41,000 people die annually as a result of traffic collisions, with an additional 3,236,000 injuries. About 38% of all fatal car crashes are alcohol related with another 30% attributed to speeding.

The causes of these crashes, emotional impact and cost in dollars spent on car crashes are typically covered in defensive driving courses. The goal of good defensive driving is to reduce the risk of these accidents by properly educating drivers to exercise caution and good judgment while driving.

### **Psychological Factors**

On the roadways, drivers have to deal with several factors that can affect their driving. Defensive driving courses tend to focus on how drivers can overcome negative psychological factors such as unneeded stress, fatigue, emotional distress and road rage.

The National Highway Traffic Safety Administration conservatively estimates that 100,000 police-reported crashes are the direct result of driver fatigue each year. This results in an estimated 1,550 deaths, 71,000 injuries, and \$12.5 billion in monetary losses.



# Information Provided By...

# The Villages®

## Community Development Districts Risk Management

### Human Factors ' DUI

Driving under the influence of drugs or alcohol continues to impact thousands of American drivers each year. While the specific effect of each drug on your body takes place in differing stages, the effect of drivers operating a vehicle while under the influence is disastrous.

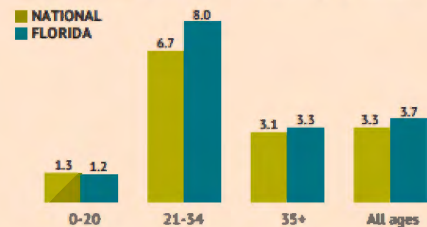
DUI is an offense under Florida law. The offense is proved by impairment of "normal faculties" or unlawful blood alcohol or breath alcohol level of .08 or above.

### ALCOHOL-INVOLVED DEATHS

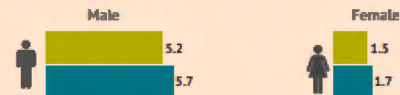
Persons Killed in Crashes Involving a Drunk Driver<sup>1</sup>



Rate of Deaths by Age (per 100,000 population), 2012



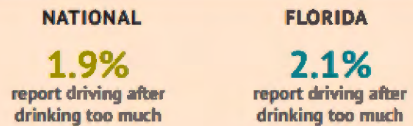
Rate of Deaths by Gender (per 100,000 population), 2012



<sup>1</sup>Deaths in crashes involving a driver with BAC ≥ 0.08%. Source: Fatality Analysis Reporting System (FARS).

### DRUNK DRIVING

Percentage of Adults Who Report Driving After Drinking Too Much (in the past 30 days)



Source: Behavioral Risk Factor Surveillance System (BRFSS), 2012.

### Safety Equipment

Approximately half of all deaths that are result of an automobile crash could have been avoided if the victim were wearing a safety belt properly. Of course safety belts are only the most commonly thought of vehicle safety equipment. Items such as air bags, child safety seats and head rests all serve to protect drivers and passengers and reduce the risk of injury or death in the event of a crash. Buckle up!



# Information Provided By...

## Crash Prevention Techniques

The key to any good defensive driving strategy is knowing how to avoid traffic crashes and recognize potential hazards before it's too late.

- Scanning the roadway and adapting to surroundings
- Employing the three to four second rule for following distances
- Knowing your vehicle's stopping distance
- Being aware of reaction distance
- Environment hazards
- Vehicle emergencies
- Sharing the road
- Passing and necessary clear distance
- Right of way
- Speed adjustments and railroad crossings
- Be aware of your surroundings — always pay attention

Being a defensive driver is being a good driver.

Buckle up, never drive impaired whether it be alcohol, prescription medications, anger or fatigue. Share the roadways but know the right of way. Always scan the roadways and be aware of your surroundings. Do not make sudden decisions that can potentially cause a wreck. Never tailgate. There should always be a vehicle length between you and the car ahead of you. Defensive driving is not only for vehicles, but all rules of the road should be followed in golf carts. Everyone wants to make it home, don't be the reason that someone doesn't.



## Information Provided By...

**The Villages®**  
Community Development Districts  
**Community Watch**

### Road Safety For All

There are many times when law enforcement, fire department, emergency medical services and Community Watch personnel assist with incidents on main and secondary roadways. Please be alert when traveling on these roadways and if you see the above vehicles with their warning lights on and traffic cones out, please slow down and move over. The personnel working these scenes need to continue to assist others at these incidents in a safe manner while helping others in their time of need. Together we all can accomplish serving others in a safe manner.



## 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. Due to the slow percolation of the soil structure in Evans Prairie, the water table rises following tropical systems that frequent Florida's peninsula during peak storm season. In an effort to provide a great golfing experience for our residents and guests, this approved capital infrastructure improvement plan will enable the ongoing access to golf holes throughout all seasons. We thank you for your patience during this time.





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

⇒ **Knudson Softball Field Parking Lot**

The Knudson Softball Field Parking Lot will be closed for maintenance on January 29th.

⇒ **Mulberry Grove Dog Park**

The Mulberry Grove Dog Park will be closed for maintenance until further notice.

⇒ **La Hacienda Regional Recreation Complex Indoor Facilities, Outdoor Facilities and Sports Pool**

The La Hacienda Regional Recreation Complex Indoor Facilities, Outdoor Facilities and Sports Pool will be closed for maintenance on January 25th.

⇒ **Hilltop Neighborhood Recreation Area Adult Pool**

The Hilltop Neighborhood Recreation Area Adult Pool will be closed for maintenance January 19th through January 22nd.

⇒ **El Santiago Village Recreation Center Indoor Facilities, Outdoor Facilities and Family Pool**

The El Santiago Village Recreation Center Indoor Facilities, Outdoor Facilities and Family Pool will be closed for maintenance on January 26th.

⇒ **Saddlebrook Village Recreation Center Indoor Facilities, Outdoor Facilities and Adult Pool**

The Saddlebrook Village Recreation Center Indoor Facilities, Outdoor Facilities and Family Pool will be closed for maintenance on January 27th.

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

The Chatham Village Recreation Center Indoor Facilities, Outdoor Facilities and Family Pool will be closed for maintenance on January 28th.

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

The Mulberry Grove Regional Recreation Complex Indoor Facilities, Outdoor Facilities and Sports Pool will be closed for maintenance January 29th.



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

⇒ **Churchill Street Village Recreation Center Indoor Facilities, Outdoor Facilities and Family Pool**

The Churchill Street Village Recreation Center Indoor Facilities, Outdoor Facilities and Family Pool will be closed for maintenance on January 28th.

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

The Allamanda Village Recreation Center Indoor Facilities, Outdoor Facilities and Family Pool will be closed for maintenance on January 26th.

⇒ **Bridgeport Village Recreation Center**

The Bridgeport Village Recreation Center will be closed for maintenance on January 27th.

⇒ **Tall Trees Neighborhood Recreation Area Adult Pool**

The Tall Trees Neighborhood Recreation Area Adult Pool will be closed for maintenance until further notice.

⇒ **Virginia Trace Neighborhood Adult Pool**

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

⇒ **SeaBreeze Regional Recreation Complex Sports Pool Restrooms, Locker Rooms and Showers**

The SeaBreeze Regional Recreation Complex Sports Pool Restrooms, Locker Rooms and Showers will be closed for maintenance January 25th through January 27th.

⇒ **Manatee Village Recreation Center**

The Manatee Village Recreation Center will be closed for cleaning on January 24th.

⇒ **Bradenton Village Recreation Center Medjool Palm Billiards Hall**

The Bradenton Village Recreation Center Medjool Palm Billiards Hall will be closed for maintenance on January 20th.

⇒ **Burnsed Recreation Center Billiards Room**

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

# Tunnel Closures

## Tunnel Closures

As recommended by the Amenity Authority Committee (AAC) and the Project Wide Advisory Committee (PWAC) and approved by the Districts which own tunnels, the multi-modal path tunnels located under Buena Vista Boulevard and El Camino Real are scheduled to be painted January 4, 2021 through January 29, 2021. The purpose for these and other tunnels to be impacted is for the capital improvement project which will yield a reflective coating to aid in visibility as one traverses the tunnel. These improvements will enhance tunnel user safety. 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 **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.)**

# FORM 1

# STATEMENT OF FINANCIAL INTERESTS

# 2020

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, 2020.

**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")

	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, appointed school superintendents, and commissioners of a community redevelopment agency created under Part III, Chapter 163 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, 2020.

## 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, 2020.

**OFFICE OR POSITION HELD OR SOUGHT:** The title of the office or position you hold, 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 accurate fair market value.

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

#### **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 (including, but not limited to, loans made as a candidate to your own campaign), Deferred Retirement Option Program (DROP) accounts, the Florida Prepaid College Plan, and bank accounts in which you have an ownership interest. Intangible personal property also includes investment products held in IRAs, brokerage accounts, and the Florida College Investment Plan. Note that the product contained in a brokerage account, IRA, or the Florida College Investment Plan is your asset—not the account or plan itself. Things like automobiles and houses you own, jewelry, and paintings are not intangible property. Intangibles relating to the same business entity may be aggregated; for example, CDs and savings accounts with the same bank. Property owned as tenants by the entirety or as joint tenants with right of survivorship, including bank accounts owned in such a manner, should be valued at 100%. The value of a leased vehicle is the vehicle's present value minus the lease residual (a number found on the lease document).

## 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, appointed school superintendent, or a commissioner of a community redevelopment agency created under Part III, Chapter 163 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.

# 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 accurate fair market value.

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

## 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 (including, but not limited to, loans made as a candidate to your own campaign), Deferred Retirement Option Program (DROP) accounts, the Florida Prepaid College Plan, and bank accounts in which you have an ownership interest. Intangible personal property also includes investment products held in IRAs, brokerage accounts, and the Florida College Investment Plan. Note that the product contained in a brokerage account, IRA, or the Florida College Investment Plan is your asset—not the account or plan itself. Things like automobiles and houses you own, jewelry, and paintings are not intangible property. Intangibles relating to the same business entity may be aggregated; for example, 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, including bank accounts owned in such a manner, 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, appointed school superintendent, or a commissioner of a community redevelopment agency created under Part III, Chapter 163 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.