



MONTVERDE TOWN COUNCIL

REGULAR MEETING AGENDA

December 9, 2025, at 7:00 p.m.

At Town Hall, 17404 Sixth Street, Montverde, FL

The Montverde Staff and Council invite you to join the meeting in person or on your computer; you can watch and listen to the meeting from home by clicking the link below.

<https://southlake.tv/player/44150/44150>

TOWN COUNCIL MEMBERS

Joe Wynkoop, Mayor
Carol Womack, Vice Mayor
Joe Morganelli, Councilmember
Grant Roberts, Councilmember
Bryan Rubio, Councilmember

STAFF

Paul Larino, Town Manager
Anita Geraci-Carver, Town Attorney
Sean Parks, Town Planner
Lisa Busto, Associate Planner
Caroline Trepanier, Town Clerk

DISCLAIMER

This booklet has been prepared for the convenience of the Montverde Town Council in discussing matters before them. Every effort has been made to include all items to be discussed at this Town Council Meeting; however, the Mayor or Council Members may add items that are not part of this Agenda or remove items from consideration. While it has been the goal to present error-free information, we do not represent that documentation is without errors or omissions.

CALL TO ORDER AND OPENING CEREMONIES

- Pledge of Allegiance
- Invocation
- Roll Call

I. PRESENTATION, ADMINISTRATIVE MATTERS AND DISCUSSION

II. CITIZENS QUESTION/COMMENT PERIOD

The Town Council invites the public to come forward with questions, comments, and concerns. The Council will not act at this meeting, but Staff may answer questions, or issues may be referred for appropriate staff action. If further action is necessary, the item may be placed on a future agenda for further review and consideration.

NOTE: Public Comment will not be taken under Citizens Questions/Comment Period for matters listed on this agenda. Public Comments on such items will be taken once the agenda item is before the Council for consideration.

III. DEPARTMENT & COMMITTEE REPORTS

- A. Town Manager Larino's Report.**
 - 1. Grant Reimbursement Tracking Sheet
- B. Town Manager Larino's Capital Project Update**
 - 1. Library
 - 2. Library Emergency Generator
 - 3. Outdoor Park Bathroom
 - 4. Small Water Storage Tank and Pump House
 - 5. Community Building
 - 6. Fire Station – County
 - 7. Kirk Park Playground
 - 8. Ridgewood Ave – ADA Ramps and Sidewalk Connections
 - 9. Lakeside Ave Storm/Street Project
 - 10. Porter and 1st Storm/Street Project
 - 11. Boat Ramp and Storm Project
 - 12. Truskett Park – Dock, Storm, FEMA Recovery
 - 13. 455 Storm Street, Sidewalk Project
 - 14. 8th, 9th, Temple Street, Sidewalk, and Storm
 - 15. Well # 1 Generator Replacement
 - 16. Elevated Water Storage Tank
 - 17. Redundant Upper Floridan Well
 - 18. New Lower Floridan Well
 - 19. Consumptive Use Permit
 - 20. Water line Upsizing, Loops, and Hydrants
 - 21. Butterfly Garden - Completed
 - 22. Sports Court – Completed
 - 23. Kirk Park Stage – Completed
 - 24. Baseball Field Conversion – Completed
 - 25. Public Works Storage – Completed
 - 26. Park Lighting – Completed
- C. Town Attorney Geraci-Carver Report.**
- D. Town Planner Parks Report.**

- E. Lake County Commission Report.
- F. Town Council Reports.
- G. Mayor Wynkoop Report.

IV. NOVEMBER FINANCE REPORT

Beginning Bank Balance	\$ 4,375,422.56
Revenues	\$ 921,869.99
Expenditures	\$ 857,622.85
Ending Balance	\$ 4,439,669.70
Pending Liabilities	\$ 107,056.27
Available Cash	\$ 4,332,613.43
Total Bank Balance	\$ 4,332,613.43

V. CONSENT AGENDA

The Council may take one vote to act on all items on the Consent Agenda or remove items for further discussion. If any member of the public desires to speak about an item on the consent agenda, you will need to step forward to the microphone and request that the item be pulled from the consent agenda before the town council votes to approve.

- A. Minutes of the Town Council Regular Meeting held November 11, 2025.
- B. Minutes of the Town Council Regular Meeting held September 9, 2025.
- C. Minutes of the Town Council Special Meeting held September 10, 2025.
- D. Minutes of the Town Council Special Meeting held September 24, 2025.

VI. PUBLIC HEARINGS, ORDINANCES AND RESOLUTIONS

- A. Resolution No. 2025-200 A Resolution of the Town Council of the Town of Montverde, Florida, awarding contract to Close Construction Services, LLC resulting from the Town's Invitation to Bid 2025-02 for Stormwater Improvements Phase 2 – Porter Avenue; Approving the Conformed Agreement between the Town of Montverde, Florida and Close Construction Services, LLC in an amount not to exceed \$796,235.00 for Montverde Stormwater Improvements Project being funded through a Florida Department of Environmental Protection Storm Water/Clean Water Grant and a Florida Department of Environmental Protection Legislative Appropriations Storm Water Grant; Authorizing the Town Manager to execute the agreement; and providing for an effective date.

- B. **Ordinance No. 2025-59** An Ordinance of the Town of Montverde, Florida, amending Section 10-13 in Chapter 10 of the Town of Montverde Land Development Code relating to minimum lot size for property annexed into the Town; providing for codification and severability; providing for the repeal of ordinances in conflict herewith; and providing for an effective date.
- C. **Ordinance No. 2025-60** An Ordinance of the Town Council of the Town of Montverde, Lake County, Florida, amending the Town of Montverde's Comprehensive Plan pursuant to 163.3187, Florida Statutes, by amending the Comprehensive Land-Use Plan designation from Lake County Rural Transition and Bella Collina to Town of Montverde Single Family Low Density Residential on the Future Land Use Map for the herein described property consisting of 9.47 +/- acres, providing for severability and scrivener's errors; the directing the Town Manager to amend said Comprehensive Plan; repealing all ordinances in conflict herewith; providing for the forwarding of this ordinance to the state of Florida Department of Commerce; and providing for an effective date.
- D. **Ordinance No. 2025-61** An Ordinance of the Town Council of the Town of Montverde, Florida, to change the zoning from Lake County PUD, Agriculture and Light Industrial and Town of Montverde Single Family Low Density to Town of Montverde Single-Family residential PUD for the herein described property owned by DCS Real Estate Investments, LLC and Wilmington Development Services Inc.; The Real Property is located South of Ridgewood Avenue, West of County Road 455 and East of Blackstill Lake Road, Montverde Florida; approving waivers; directing the Town Manager to amend the zoning map as herein provided after the passage of this ordinance; approving variances from Town Code with conditions; providing for severability; repealing all ordinances in conflict herewith; providing for scrivener's errors, and providing for an effective date.
- E. **Ordinance No. 2025-62** An ordinance of the Town of Montverde, Lake County, Florida, relating to the Regulation of the Operation of Golf Carts on Public Streets within the Town of Montverde; Amending Chapter 24 of the Montverde Code of Ordinances; Providing for Repeal if all Conflicting Ordinances; Providing for Severability and Providing for an Effective Date.

VII. DISCUSSION AND ACTION ITEM

- A. Discussion on Franklin Pond
- B. JPA Discussion
- C. Selection of MPO Board Member
- D. Selection of 2026 FLC Voting Delegate
- E. Discussion of topics for Future Town Council Workshops

VIII. REMINDERS AND ADJOURNMENT

- A.** Any further business from Town Manager or Councilmembers
- B.** Motion to Adjourn

The Town Council reserves the right to move any Agenda item to an earlier time during the meeting as its schedule permits, except for items and appointments that have been advertised in a newspaper for a specific time.

Pursuant to the provisions of Chapter 286 Florida Statutes, Section 286.0105, if a person decides to appeal any decision made by the Town Council with respect to any matter considered at this Council meeting, he or she will need a record of the proceedings, and that, for such purpose, he or she may need to ensure that a verbatim record of the proceedings is made, which record may include the testimony and evidence upon which the appeal is to be based.

Persons with disabilities who need assistance to participate in any of these proceedings should contact Town Hall at (407) 469-2681, 48 business hours before the scheduled meeting.

PRESENTATION, ADMINISTRATIVE MATTERS AND DISCUSSION

CITIZENS QUESTION/COMMENT PERIOD

DEPARTMENT & COMMITTEE REPORTS

HIGHWAY PATROL ACTIVITY 2024-2025

	HOURS	MILES	STOPS	TICKETS	WARNINGS	ARREST
OCTOBER	103	519	133	27	84	0
NOVEMBER	192	1109	352	102	194	0
DECEMBER	138	749	236	57	137	0
JANUARY	152	970	278	86	173	1
FEBRUARY	150	911	276	93	153	2
MARCH	81	435	109	32	82	0
APRIL	53	332	86	30	57	0
MAY	160	997	264	89	178	0
JUNE	133	809	195	57	146	0
JULY	42	252	59	14	45	0
AUG	114	1134	158	70	91	1
SEPTEMBER	165	1145	225	79	153	0
OCTOBER	159	1003	189	65	144	0
NOVEMBER	137	842	183	66	133	0
DECEMBER						
TOTAL	1779	11207	2743	867	1770	4

HIGHWAY PATROL ACTIVITY 2024-2025

	HOURS	MILES	STOPS	TICKETS	WARNINGS	ARREST
OCTOBER	11	202	21	4	11	0
NOVEMBER	8	137	15	5	10	0
DECEMBER	0	0	0	0	0	0
JANUARY	10	170	20	10	10	1
FEBRUARY	15	210	28	11	22	2
MARCH	5	50	10	2	8	0
APRIL	0	0	0	0	0	0
MAY	6	126	11	2	9	0
JUNE	2	28	6	1	6	0
JULY	6	112	13	3	11	0
AUGUST	8	105	11	6	5	0
SEPTEMBER	0	0	0	0	0	0
OCTOBER	3	64	5	1	4	0
NOVEMBER	0	0	0	0	0	0
DECEMBER						
TOTAL	74	1204	140	45	96	3

	HOURS	MILES	STOPS	TICKETS	WARNINGS	ARREST
OCTOBER						
NOVEMBER						
DECEMBER						
JANUARY						
FEBRUARY						
MARCH						
APRIL						
MAY						
JUNE						
JULY						
AUGUST	27	474	25	14	15	1
SEPTEMBER	35	479	51	25	33	0
OCTOBER	29	309	45	16	37	0
NOVEMBER	4	82	7	3	5	0
DECEMBER						
TOTAL	95	1344	128	58	90	1

	HOURS	MILES	STOPS	TICKETS	WARNINGS	ARREST
OCTOBER	23	97	23	4	19	0
NOVEMBER	24	138	20	0	23	0
DECEMBER	7	108	7	0	8	0
JANUARY	24	185	31	0	35	0
FEBRUARY	14	137	16	0	15	0
MARCH	5	52	7	1	11	0
APRIL	4	60	4	0	5	0
MAY	29	154	24	0	27	0
JUNE	25	214	26	0	33	0
JULY	0	0	0	0	0	0
AUGUST	0	0	0	0	0	0
SEPTEMBER	0	0	0	0	0	0
OCTOBER	0	0	0	0	0	0
NOVEMBER	0	0	0	0	0	0
DECEMBER	0	0	0	0	0	0
TOTAL	155	1145	158	5	176	0

	HOURS	MILES	STOPS	TICKETS	WARNINGS	ARREST
OCTOBER						
NOVEMBER	46	354	101	33	58	0
DECEMBER	61	461	136	37	80	0
JANUARY	94	555	191	68	107	0
FEBRUARY	46	344	103	47	51	0
MARCH	15	133	30	16	14	0
APRIL	25	212	46	22	24	0
MAY	79	577	170	76	94	0
JUNE	62	447	114	48	66	0
JULY	0	0	0	0	0	0
AUGUST	52	395	84	43	41	0
SEPTEMBER	66	466	98	42	56	0
OCTOBER	57	402	80	32	48	0
NOVEMBER	43	330	58	28	30	0
DECEMBER						
TOTAL	646	4676	1211	492	669	0

	HOURS	MILES	STOPS	TICKETS	WARNINGS	ARREST
OCTOBER						
NOVEMBER						
DECEMBER						
JANUARY						
FEBRUARY						
MARCH						
APRIL						
MAY						
JUNE						
JULY						
AUGUST						
SEPTEMBER						
OCTOBER	11	68	19	9	21	0
NOVEMBER	30	210	46	15	46	
DECEMBER						
TOTAL	41	278	65	24	67	0

	HOURS	MILES	STOPS	TICKETS	WARNINGS	ARREST
OCTOBER	69	220	89	19	54	0
NOVEMBER	114	480	216	64	103	0
DECEMBER	70	180	93	20	49	0
JANUARY	24	60	36	8	21	0
FEBRUARY	75	220	129	35	65	0
MARCH	56	200	62	13	49	0
APRIL	24	60	36	8	28	0
MAY	46	140	59	11	48	0
JUNE	44	120	49	8	41	0
JULY	36	140	46	11	34	0
AUGUST	27	160	38	7	30	0
SEPTEMBER	65	200	76	12	64	0
OCTOBER	59	160	40	7	34	0
NOVEMBER	60	220	72	20	52	0
DECEMBER						
TOTAL	769	2560	1041	243	672	0



Lake County Fire Rescue

315 W. Main Street Tavares, FL 32778

Montverde Monthly Report

Report Dates: November 01 2025 to November 30 2025



Summary of incident types within municipality

SERVICE CALL	1
FALLS	2
ALARMS	3
STROKE	1
MOTOR VEHICLE COLLISION	1
_MEDICAL	5
CHEST PAIN	2
SICK PERSON	2
SEIZURES	2
UNCONSCIOUS/FAINTING	1
TRAUMATIC INJURIES	3

TOTAL CALLS FOR SERVICE: 23

Summary of incident types outside municipality

HEART PROBLEMS	2
CHEST PAIN	1
ALARMS	2
FALLS	6
HEADACHE	1
LOST PERSON	1
STRUCTURE FIRE	2
TRAUMATIC INJURIES	1
SICK PERSON	6
UNCONSCIOUS/FAINTING	3
_MEDICAL	3
PSYCHIATRIC/SUICIDE ATTEMPT	2
BREATHING PROBLEMS	2
GAS LEAK/GAS ODOR	1
MOTOR VEHICLE COLLISION	4
VEGETATION/WILDLAND/BRUSH/GRASS FIRE	1
OUTSIDE FIRE	1

TOTAL CALLS FOR SERVICE: 39

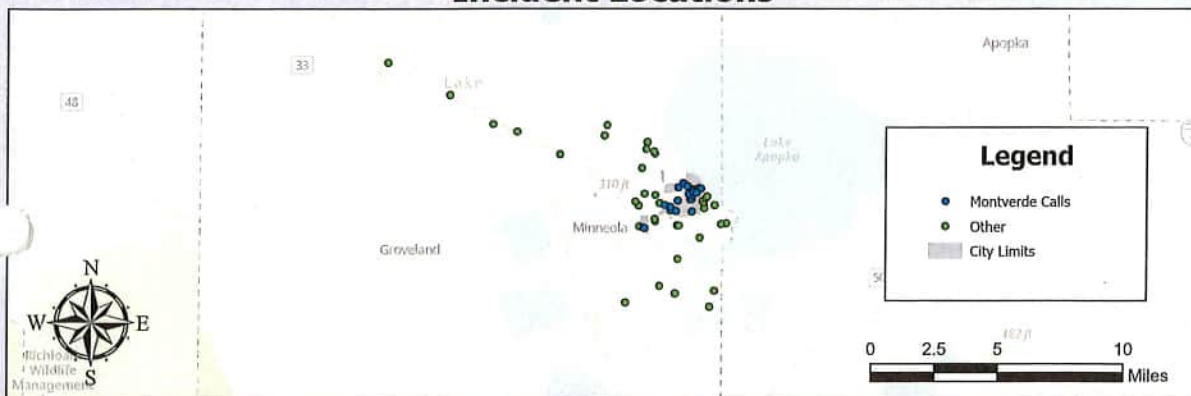
INCIDENT SUMMARY DETAILS

	DISPATCHED	CANCELLED	ON SCENE
TOWN OF MONTVERDE	23	2	21
ALL OTHER AREAS	39	10	29

HIGH ACUITY CALLS

	DISPATCHED	AVERAGE	90th PERCENTILE
TOWN OF MONTVERDE	0		
ALL OTHER AREAS	2	7:21	7:42

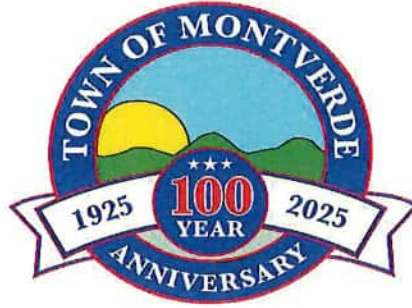
Incident Locations





Impact Fee Summary Report

Impact Fee	Prior Years's Cash Balance	Fee Received YTD 2026	Total Expenditures YTD FY 2026	Remaining Fund Balance
Parks & Rec Impact Fee	\$ (308,491.88)	\$ 6,395.48	\$ -	\$ (302,096.40)
Road & Street Impact Fee	\$ (42,996.14)	\$ 11,219.79	\$ -	\$ (31,776.35)
Administrative Impact Fee	\$ 141,328.04	\$ 26,151.42	\$ -	\$ 167,479.46
Water Impact Fee	\$ 874,064.89	\$ 39,624.39	\$ -	\$ 913,689.28



**Cash Balance Finance Report
And
Budget to Actual Report
2025-2026**

**Date of Report: December 04, 2025
Report Beginning Period: November 01, 2025
Report Ending Period: November 30, 2025**

**Prepared by: Mai Yang, Finance Director
Reviewed by: Paul Larino, Town Manager**

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Cash Summary

Available Bank Cash - Fund Account:	\$4,332,613.43
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Fund Cash:

Restricted Funds:	\$2,958,868.01
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Unrestricted Funds:	\$1,373,745.42
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<u>Total Cash:</u>	\$4,332,613.43
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TOWN OF MONTVERDE
FINANCE CASH REPORT AS OF: FY November 2025 - November 2025

Book and Cash Account

Operating Cash Account 1 and 2:

Beginning Bank Balance	\$4,375,422.56
Revenues	\$921,869.99
Expenditures	\$857,622.85
Ending Bank Balance	\$4,439,669.70
 Pending/Outstanding Liabilities	 \$107,056.27
Available Cash	\$4,332,613.43

Total Cash Account: \$4,332,613.43

Restricted Funds:

Parks & Recreation Impact Fee Fund	-\$302,096.40
Fire Protection Impact Fee Fund	\$0.00
Road & Street Impact Fee Fund	-\$31,776.35
Administrative Impact Fee Fund	\$167,479.46
Water Impact Fee Fund	\$913,689.28

Water Deposit	\$163,888.05
Water Cash	\$1,875,088.80

ARPA	\$0.00
Remaining County ARPA	\$0.00
Capital Projects Appropriations	\$151,000.00
One Half Cent Sales Tax (Transportation Fee)	\$11,523.17
Police	\$6,436.00
Historical	\$3,636.00

Restricted Funds Total: \$2,958,868.01

Available Unrestricted Funds for General Account: \$1,373,745.42

Budget to Actual Summary

Total Reporting Months in this Report:	2 OF 12
Percentage of the Budget Year:	16.7%

Revenues – General Fund

General Revenue Budgeted:	\$3,342,795.80
General Revenue Budget Received YTD:	\$877,736.96
Percentage of Budget Received:	26.26%
Remaining Revenue to be Received in FY 2025:	\$2,465,058.84

Expenditures – General Fund

General Fund Expenditures Budgeted:	\$3,342,795.80
General Fund Expenditures Expended YTD:	\$375,161.91
Percentage of Budget Expended:	11.22%
Remaining General Fund Budgeted to Expend:	\$2,967,633.89

Revenues – Water Fund

Water Revenue Budgeted:	\$1,207,755.95
Water Revenue Budget Received YTD:	\$210,191.36
Percentage of Budget Received:	17.40%
Remaining Revenue to be Received in FY 2025:	\$997,564.59

Budget to Actual Summary

Expenditures – Water Fund

Water Fund Expenditures Budgeted:	\$1,207,755.95
Water Fund Expenditures Expended YTD:	\$135,867.63
Percentage of Budget Expended:	11.25%
Remaining Water Fund Budgeted to Expend:	\$1,071,888.32

Revenues – Sewer Fund

Sewer Revenue Budgeted:	\$202,020.00
Sewer Revenue Budget Received YTD:	\$32,610.48
Percentage of Budget Received:	16.14%
Remaining Revenue to be Received in FY 2025:	\$169,409.52

Expenditures – Sewer Fund

Sewer Fund Expenditures Budgeted:	\$202,020.00
Sewer Fund Expenditures Expended YTD:	\$22,602.04
Percentage of Budget Expended:	11.19%
Remaining Water Fund Budgeted to Expend:	\$179,417.96

Budget to Actual Summary

Revenues – Capital Fund

Capital Revenue Budgeted:	\$34,619,324.90
Capital Revenue Budget Received YTD:	\$342,038.00
Percentage of Budget Received:	0.99%
Remaining Revenue to be Received in FY 2025:	\$34,277,286.90

Expenditures – Capital Fund

Capital Fund Expenditures Budgeted:	\$34,619,324.90
Capital Fund Expenditures Expended YTD:	\$333,831.65
Percentage of Budget Expended:	0.96%
Remaining Capital Fund Budgeted to Expend:	\$34,285,493.25

Account Number	Account Title	2025 November Actual	2025-26 YTD Actual	2025-26 Current year Budget	Revenue to be Received	% Of Budget
GENERAL FUND						
001-311100	Ad Valorem Taxes	78,150.78	78,150.78	753,314.00	675,163.22	10.37%
001-312410	Local Option Gas Tax	5,557.11	5,568.03	85,000.00	79,431.97	6.55%
001-312600	Discretionary Tax	31,621.68	31,621.68	210,000.00	178,378.32	15.06%
001-314100	Electric Service Tax	12,670.75	12,670.75	110,000.00	97,329.25	11.52%
001-314400	Natural Gas Service Tax	441.20	441.20	5,600.00	4,306.35	23.10%
001-315100	Communications Service Tax	7,459.79	7,459.79	82,000.00	74,540.21	9.10%
001-323100	Electricity Franchise	18,565.09	18,565.09	190,000.00	171,434.91	9.77%
001-323400	Gas Franchise	541.70	549.83	7,000.00	5,316.31	24.05%
001-329504	Permit Fire Reivew Fee	.00	.00	2,000.00	2,000.00	.00
001-329505	Reinspection Fees	150.00	225.00	10,000.00	9,775.00	2.25%
001-329506	Plan Review	29,037.60	43,743.60	155,000.00	107,650.72	30.55%
001-329507	Building Permit Fees	41,005.24	82,758.20	385,000.00	291,530.31	24.28%
001-329508	Administrative Fee	16,589.26	32,527.52	125,000.00	88,435.68	29.25%
001-329509	State Permit Surcharge	1,612.29	3,010.61	14,000.00	10,631.46	24.06%
001-329510	Zoning/Permit Appl Fees	1,750.00	5,635.00	25,000.00	18,995.00	24.02%
001-329515	Row Utilization Fees	.00	250.00	1,500.00	1,250.00	16.67%
001-335150	Alcoholic Beverage License	97.89	97.89	500.00	402.11	19.58%
001-335180	1/2 Cent Sales Tax	11,523.17	11,523.17	130,000.00	118,476.83	8.86%
001-335190	State Revenue Sharing	.00	.00	70,000.00	70,000.00	.00
001-337700	Grants & Donations	436,302.45	436,302.45	500.00	435,802.45	87260.49%
001-338000	Library Interlocal w/ Lake Co	3,250.05	9,750.15	36,500.00	26,749.85	26.71%
001-338100	One Cent Gas Tax - Lake Co.	1,325.96	1,325.96	8,000.00	6,674.04	16.57%
001-341210	Notary, Copy, Fax Fees	253.51	575.58	5,000.00	4,424.42	11.51%
001-341215	Public Record Requests	.00	22.00	50.00	28.00	44.00%
001-341220	Mva Traffic Signal Maintenance	.00	.00	1,300.00	1,300.00	.00
001-341500	Lien Search Charge	125.00	325.00	1,500.00	1,175.00	21.67%
001-343400	Garbage Service Charges	28,062.64	50,490.12	340,000.00	289,509.88	14.85%
001-343410	Garbage Late Fee	195.45	475.64	2,000.00	1,524.36	23.78%
001-347210	Trunk Or Treat	.00	500.00	.00	500.00	.00
001-347220	Montverde Day	19,765.74	35,315.74	50,000.00	14,684.26	70.63%
001-347261	License Plate Revenue	10.00	10.00	100.00	90.00	10.00%
001-351100	Court Fines - Dept Hwy Safety	840.24	1,427.92	4,500.00	3,072.08	31.73%
001-352100	Library Fines	25.50	171.45	150.00	44.05	129.37%
001-354200	Code Compliance Fines	73.74	177.74	5,000.00	4,822.26	3.55%
001-361000	FEMA - Revenue	.00	.00	250,000.00	250,000.00	.00
001-361002	Insurance -	.00	.00	.00	1,086.00	.00
001-361100	Interest Earnings	1,725.51	1,725.51	35,000.00	33,274.49	4.93%
001-362100	17406 7Th Street Rental	1,276.48	2,573.77	14,000.00	11,426.23	18.38%
001-362260	Rental Income - Cell Tower	.00	.00	44,000.00	44,000.00	.00
001-362300	Post Office Rental Revenue	1,663.75	1,663.75	18,100.00	14,772.50	18.38%
001-364100	Asset Sales (Equip/Veh/Mchnry)	.00	.00	10,000.00	10,000.00	.00
001-366000	Donations	60.00	85.00	500.00	415.00	17.00%
001-366240	Community Building Rental	.00	.00	100.00	100.00	.00
001-366245	Contributions To Cemetry	.00	.00	50.00	50.00	.00
001-369900	Other Revenues	13.54	21.04	5,521.80	5,475.76	0.83%
001-381200	Bal Fwd Fund Appropriation	.00	.00	150,000.00	150,000.00	.00
001-388800	Library Book Sales	.00	.00	10.00	10.00	.00
Total Revenue:		751,743.11	877,736.96	3,342,795.80	2,441,193.28	26.97%
GENERAL FUND Revenue Total:		751,743.11	877,736.96	3,342,795.80	2,441,193.28	26.97%
Net Total GENERAL FUND:		751,743.11	877,736.96	3,342,795.80	2,441,193.28	26.97%

Account Number	Account Title	2025 November Actual	2025-26 YTD Actual	2025-26 Current year Budget	Revenue to be Received	% Of Budget
PARKS & REC IMPACT FEE FUND						
140-347200	Impact Fee Revenue	.00	6,395.48	92,000.00	83,777.24	8.94%
	Total Revenue:	.00	6,395.48	92,000.00	83,777.24	8.94%
	PARKS & REC IMPACT FEE FUND Revenue Total:	.00	6,395.48	92,000.00	83,777.24	8.94%
	Net Total PARKS & REC IMPACT FEE FUND:	.00	6,395.48	92,000.00	83,777.24	8.94%

Account Number	Account Title	2025 November Actual	2025-26 YTD Actual	2025-26 Current year Budget	Revenue to be Received	% Of Budget
ROAD & STREET IMPACT FEE FUND						
160-324218	Road & Streets Impact Fees	5,468.24	11,219.79	346,187.26	333,324.17	3.72%
160-324220	Road & Streets Impact Fees	.00	.00	350,000.00	350,000.00	.00
Total Revenue:		5,468.24	11,219.79	696,187.26	683,324.17	1.85%
ROAD & STREET IMPACT FEE FUND Revenue Total:						
		5,468.24	11,219.79	696,187.26	683,324.17	1.85%
Net Total ROAD & STREET IMPACT FEE FUND:		5,468.24	11,219.79	696,187.26	683,324.17	1.85%

Account Number	Account Title	2025 November Actual	2025-26 YTD Actual	2025-26 Current year Budget	Revenue to be Received	% Of Budget
ADMINISTRATIVE IMPACT FEE FUND						
170-324250	Admin Impact Fee - Library	12,727.80	26,151.42	50,000.00	20,013.26	59.97%
170-324251	Admin Impact Fee Library C Fwd	.00	.00	100,000.00	100,000.00	.00
Total Revenue:		12,727.80	26,151.42	150,000.00	120,013.26	19.99%
ADMINISTRATIVE IMPACT FEE FUND Revenue Total:		12,727.80	26,151.42	150,000.00	120,013.26	19.99%
Net Total ADMINISTRATIVE IMPACT FEE FUND:		12,727.80	26,151.42	150,000.00	120,013.26	19.99%

Account Number	Account Title	2025 November Actual	2025-26 YTD Actual	2025-26 Current year Budget	Revenue to be Received	% Of Budget
CAPITAL - BOAT RAMP						
330-334700	State DEP Grant	.00	.00	300,000.00	300,000.00	.00
330-334710	Stormwater Grants	.00	.00	100,000.00	100,000.00	.00
330-334711	LCWA Grant - Boat Ramp	.00	.00	80,000.00	80,000.00	.00
Total Revenue:		.00	.00	480,000.00	480,000.00	.00
CAPITAL - BOAT RAMP Revenue Total:		.00	.00	480,000.00	480,000.00	.00
Net Total CAPITAL - BOAT RAMP:		.00	.00	480,000.00	480,000.00	.00

Account Number	Account Title	2025 November Actual	2025-26 YTD Actual	2025-26 Current year Budget	Revenue to be Received	% Of Budget
CAPITAL - LEAD SERVICE LINE						
341-334310	State DEP Grant	.00	.00	42,000.00	42,000.00	.00
Total Revenue:		.00	.00	42,000.00	42,000.00	.00
CAPITAL - LEAD SERVICE LINE Revenue Total:		.00	.00	42,000.00	42,000.00	.00
Net Total CAPITAL - LEAD SERVICE LINE:		.00	.00	42,000.00	42,000.00	.00

Account Number	Account Title	2025 November Actual	2025-26 YTD Actual	2025-26 Current year Budget	Revenue to be Received	% Of Budget
FOSGATE TRAIL CONNECTION						
370-336000	Developer Donations Carry Fwd	.00	.00	100,000.00	100,000.00	.00
Total Revenue:		.00	.00	100,000.00	100,000.00	.00
FOSGATE TRAIL CONNECTION Revenue Total:		.00	.00	100,000.00	100,000.00	.00
Net Total FOSGATE TRAIL CONNECTION:		.00	.00	100,000.00	100,000.00	.00

Account Number	Account Title	2025 November Actual	2025-26 YTD Actual	2025-26 Current year Budget	Revenue to be Received	% Of Budget
WATER						
400-343300	Water Service Chrgs - Potable	36,544.44	74,910.35	595,000.00	520,089.65	12.59%
400-343301	Bulk Water Sales	7,845.40-	7,845.40-	20,000.00	27,845.40	-39.23%
400-343310	Irrigation Water Service Chrgs	35,445.45	63,449.06	350,000.00	286,550.94	18.13%
400-343330	Administrative Fee	734.06	2,232.68	15,000.00	12,627.32	15.82%
400-343331	Water Meter Install Charges	23,116.00	71,416.00	180,000.00	98,084.00	45.51%
400-343390	Water Late Fees	455.03	1,113.14	10,000.00	8,886.86	11.13%
400-343600	Surcharge	1,974.63	4,176.02	29,755.95	25,579.93	14.03%
400-361100	Interest Earnings	739.51	739.51	8,000.00	7,260.49	9.24%
Total Revenue:		91,163.72	210,191.36	1,207,755.95	986,924.59	18.28%
WATER Revenue Total:		91,163.72	210,191.36	1,207,755.95	986,924.59	18.28%
Net Total WATER:		91,163.72	210,191.36	1,207,755.95	986,924.59	18.28%

Account Number	Account Title	2025 November Actual	2025-26 YTD Actual	2025-26 Current year Budget	Revenue to be Received	% Of Budget
WATER IMPACT FEE FUND						
410-324210	Water Impact Fees	11,422.14	39,624.39	399,750.00	360,125.61	9.91%
410-324211	Water Impact Fees - Carry Fwd	.00	.00	626,019.82	626,019.82	.00
Total Revenue:		11,422.14	39,624.39	1,025,769.82	986,145.43	3.86%
WATER IMPACT FEE FUND Revenue Total:		11,422.14	39,624.39	1,025,769.82	986,145.43	3.86%
Net Total WATER IMPACT FEE FUND:		11,422.14	39,624.39	1,025,769.82	986,145.43	3.86%

Account Number	Account Title	2025 November Actual	2025-26 YTD Actual	2025-26 Current year Budget	Revenue to be Received	% Of Budget
CAPITAL-WATER ENTERPRISE						
420-334311	SHAFI Grant	.00	170,000.00	12,717,625.60	12,547,625.60	1.34%
Total Revenue:		.00	170,000.00	12,717,625.60	12,547,625.60	1.34%
CAPITAL-WATER ENTERPRISE Revenue Total:		.00	170,000.00	12,717,625.60	12,547,625.60	1.34%
Net Total CAPITAL-WATER ENTERPRISE:		.00	170,000.00	12,717,625.60	12,547,625.60	1.34%

Account Number	Account Title	2025 November Actual	2025-26 YTD Actual	2025-26 Current year Budget	Revenue to be Received	% Of Budget
SEWER-ENTERPRISE (WASTE WATER)						
421-343307	Sewer Connection Fees	.00	3,918.89	35,000.00	29,381.11	16.05%
421-343320	Sewer Service Charge	12,908.54	25,951.48	152,000.00	126,048.52	17.07%
421-343390	Sewer Late Fees	119.23	326.13	1,000.00	673.87	32.61%
421-343500	Surcharges Out of Town Limits	925.15	2,413.98	14,000.00	11,586.02	17.24%
421-361100	Interest Earnings	.00	.00	10.00	10.00	.00
421-369900	Other Revenues	.00	.00	10.00	10.00	.00
Total Revenue:		13,952.92	32,610.48	202,020.00	167,709.52	16.98%
SEWER-ENTERPRISE (WASTE WATER) Revenue Total:						
		13,952.92	32,610.48	202,020.00	167,709.52	16.98%
Net Total SEWER-ENTERPRISE (WASTE WATER):		13,952.92	32,610.48	202,020.00	167,709.52	16.98%

Account Number	Account Title	2025 November Actual	2025-26 YTD Actual	2025-26 Current year Budget	Revenue to be Received	% Of Budget
CAPITAL - STORM WATER						
430-334360	Grants	.00	.00	339,150.00	339,150.00	.00
430-334361	State Appropriation	.00	.00	1,117,231.30	1,117,231.30	.00
430-334363	CW35133-SAHFI Grant-Stormwater	.00	172,038.00	19,823,318.00	19,651,280.00	0.87%
Total Revenue:		.00	172,038.00	21,279,699.30	21,107,661.30	0.81%
CAPITAL - STORM WATER Revenue Total:		.00	172,038.00	21,279,699.30	21,107,661.30	0.81%
Net Total CAPITAL - STORM WATER:		.00	172,038.00	21,279,699.30	21,107,661.30	0.81%
Net Grand Totals:		886,477.93	1,545,967.88	41,335,853.73	39,746,374.39	3.85%

Report Criteria:

Accounts to include: With balances or activity
Print Fund Titles
Page and Total by Fund
Include Departments: None
Print Department Titles
Total by Department
Include Objects: None
All Segments Tested for Total Breaks

Account Number	Account Title	2025 November Actual	2025-25 YTD Actual	2025-26 Current year Budget	2025-26 Amended year Budget	Variance	% Of Budget
GENERAL FUND							
TOWN COUNCIL							
001-511-240	Workers Compensation	.00	.00	680.00	680.00	680.00	.00
001-511-342	Council Stipends	3,283.33	6,566.66	44,500.00	44,500.00	37,933.34	14.76%
001-511-400	Travel	.00	.00	750.00	750.00	750.00	.00
001-511-445	Election Expense	.00	.00	20,000.00	20,000.00	20,000.00	.00
001-511-450	Insurance	2,068.82	2,068.82	9,385.20	9,385.20	7,316.38	22.04%
001-511-460	Repairs & Maintenance	89.60	978.31	8,000.00	8,000.00	7,021.69	12.23%
001-511-470	Printing & Copying	.00	.00	1,000.00	1,000.00	1,000.60	-0.06%
001-511-490	Other Current Charges	132.53	132.53	1,500.00	1,500.00	1,367.47	8.84%
001-511-491	Council Workshop & Comm Meals	282.61	1,372.64	20,000.00	20,000.00	18,627.36	6.86%
001-511-510	Office Supplies	48.40	473.32	750.00	750.00	276.68	63.11%
001-511-520	Operating Supplies	.00	1,037.69	2,500.00	2,500.00	1,462.31	41.51%
001-511-521	Uniforms & Clothing	.00	.00	1,000.00	1,000.00	1,000.00	.00
001-511-540	Subscriptions & Memberships	664.00	664.00	9,500.00	9,500.00	8,836.00	6.99%
001-511-550	Seminars & Training	.00	.00	7,000.00	7,000.00	7,000.00	.00
001-511-551	Economic Development	.00	.00	750.00	750.00	750.00	.00
Total TOWN COUNCIL:		6,569.29	13,293.97	127,315.20	127,315.20	114,021.83	10.44%
FINANCE & ADMINISTRATIVE							
001-513-120	Regular Salaries & Wages	10,396.50	22,078.56	153,888.83	153,888.83	131,810.27	14.35%
001-513-121	Employee Christmas and Perform	.00	.00	33,500.00	33,500.00	33,500.00	.00
001-513-140	Overtime	2,337.22	3,035.83	7,500.00	7,500.00	4,464.17	40.48%
001-513-210	FICA Matching	951.07	1,880.18	12,347.00	12,347.00	10,466.82	15.23%
001-513-220	Retirement Plan	2,391.09	4,576.25	21,997.30	21,997.30	17,421.05	20.80%
001-513-230	Health Insurance	1,987.94	3,975.88	39,000.00	39,000.00	35,024.12	10.19%
001-513-234	Short-Term Disability	102.10	204.20	1,200.00	1,200.00	995.80	17.02%
001-513-240	Workers Compensation	.00	.00	1,950.00	1,950.00	1,950.00	.00
001-513-310	Professional Services	.00	.00	20,000.00	20,000.00	20,000.00	.00
001-513-320	Accounting & Auditing	.00	.00	12,000.00	12,000.00	12,000.00	.00
001-513-340	Contractual Services	2,352.14	2,859.57	18,000.00	18,000.00	15,140.43	15.89%
001-513-400	Travel	25.76	221.76	1,500.00	1,500.00	1,278.24	14.78%
001-513-410	Telephone	118.54	118.54	3,000.00	3,000.00	2,881.46	3.95%
001-513-411	Internet	125.00	225.00	1,600.00	1,600.00	1,375.00	14.06%
001-513-420	Postage & Freight	487.60	1,277.10	4,500.00	4,500.00	3,222.90	28.38%
001-513-430	Utilities	482.14	482.14	6,700.00	6,700.00	6,217.86	7.20%
001-513-440	Rentals & Leases Building Repr	750.00	750.00	5,000.00	5,000.00	4,250.00	15.00%
001-513-450	Insurance	4,910.17	4,910.17	22,275.00	22,275.00	17,364.83	22.04%
001-513-460	Repair & Maintenance	1,405.00	1,405.00	10,000.00	10,000.00	8,595.00	14.05%
001-513-470	Printing & Copying	.00	.00	3,500.00	3,500.00	3,500.00	.00
001-513-490	Other Current Charges	.00	56.75	2,500.00	2,500.00	2,443.25	2.27%
001-513-492	Employee Meals & Appreciation	.00	192.51	4,500.00	4,500.00	4,307.49	4.28%
001-513-495	Bank Finance Charges	20.00	45.00	550.00	550.00	505.00	8.18%
001-513-510	Office Supplies	77.96	543.83	5,000.00	5,000.00	4,456.17	10.88%
001-513-513	TM Allowance	203.08	406.16	4,400.00	4,400.00	3,993.84	9.23%
001-513-520	Operating Supplies	.00	2,582.43	2,850.00	2,850.00	267.57	90.61%
001-513-521	Uniforms & Clothing	.00	.00	1,400.00	1,400.00	1,400.00	.00
001-513-522	Small Tools & Equipment	.00	9,762.30	.00	.00	9,762.30-	.00
001-513-540	Subscriptions, Membership	.00	303.00	2,900.00	2,900.00	2,597.00	10.45%
001-513-550	Seminars And Training	1,511.99	1,686.99	4,500.00	4,500.00	2,813.01	37.49%
001-513-560	Small Tools & Equipment	.00	.00	500.00	500.00	500.00	.00
001-513-605	Capital - Town Hall	.00	.00	25,000.00	25,000.00	25,000.00	.00

Account Number	Account Title	2025 November Actual	2025-25 YTD Actual	2025-26 Current year Budget	2025-26 Amended year Budget	Variance	% Of Budget
Total FINANCE & ADMINISTRATIVE:		30,635.30	63,579.15	433,558.13	433,558.13	369,978.98	14.66%
LEGAL COUNSEL							
001-514-310	Professional Services	2,375.00	2,375.00	65,000.00	65,000.00	62,625.00	3.65%
001-514-510	Office Supplies	.00	.00	500.00	500.00	500.00	.00
Total LEGAL COUNSEL:		2,375.00	2,375.00	65,500.00	65,500.00	63,125.00	3.63%
PERMITTING							
001-519-120	Regular Salaries & Wages	8,875.90	17,774.79	117,522.15	117,522.15	99,747.36	15.12%
001-519-140	Overtime	1,916.19	2,741.85	9,500.00	9,500.00	6,758.15	28.86%
001-519-210	FICA Matching	837.17	1,580.66	9,718.00	9,718.00	8,137.34	16.27%
001-519-220	Retirement Plan	2,069.20	3,966.58	17,313.12	17,313.12	13,346.54	22.91%
001-519-230	Health Insurance	2,246.02	4,492.04	24,840.00	24,840.00	20,347.96	18.08%
001-519-234	Short-Term Disability	78.88	157.76	800.00	800.00	642.24	19.72%
001-519-240	Workers Compensation	.00	.00	900.00	900.00	900.00	.00
001-519-310	Professional Services	4,630.00	4,630.00	60,000.00	60,000.00	55,370.00	7.72%
001-519-315	Building Official Fees	.00	16,410.73	250,250.00	250,250.00	233,839.27	6.56%
001-519-340	Contractual Services-Citizense	2,117.74	2,488.17	25,000.00	25,000.00	22,511.83	9.95%
001-519-350	Municode	248.06	248.06	4,800.00	4,800.00	4,551.94	5.17%
001-519-410	Telephone	37.45	331.65	2,000.00	2,000.00	1,668.35	16.58%
001-519-411	Internet	125.00	225.00	2,000.00	2,000.00	1,775.00	11.25%
001-519-420	Postage & Freight	.00	.00	2,500.00	2,500.00	2,500.00	.00
001-519-440	Rentals & Leases	.00	.00	1,200.00	1,200.00	1,200.00	.00
001-519-450	Insurance	1,374.85	1,374.85	6,237.00	6,237.00	4,862.15	22.04%
001-519-470	Printing & Copying	.00	.00	750.00	750.00	750.00	.00
001-519-490	Other Current Charges	240.31	502.31	600.00	600.00	97.69	83.72%
001-519-495	Bank Finance Charges	220.46	776.18	6,000.00	6,000.00	5,223.82	12.94%
001-519-510	Office Supplies	126.23	268.42	1,500.00	1,500.00	1,231.58	17.89%
001-519-513	TM Allowances	138.46	276.92	3,300.00	3,300.00	3,023.08	8.39%
001-519-520	Operating Supplies	.00	1,224.42	1,500.00	1,500.00	275.58	81.63%
001-519-521	Uniforms & Clothing	.00	.00	1,200.00	1,200.00	1,200.00	.00
001-519-540	Subscriptions, Membership	.00	240.00	800.00	800.00	560.00	30.00%
001-519-550	Seminars And Training	.00	.00	3,500.00	3,500.00	3,500.00	.00
001-519-605	Capital Equipment & Buildings	.00	445.50	.00	.00	445.50-	.00
Total PERMITTING:		25,281.92	60,155.89	553,730.27	553,730.27	493,574.38	10.86%
PUBLIC SAFETY							
001-520-240	Workers Compensation	.00	.00	534.00	534.00	534.00	.00
001-520-343	Contract Srvc Highway Patrol	7,641.70	16,695.50	140,000.00	140,000.00	123,304.50	11.93%
001-520-344	Contract Srvc LCSO or HP	.00	.00	30,000.00	30,000.00	30,000.00	.00
001-520-410	Telephone	37.45	37.45	500.00	500.00	462.55	7.49%
001-520-411	Internet	643.20	643.20	6,500.00	6,500.00	5,856.80	9.90%
001-520-430	Utilities	302.53	302.53	1,800.00	1,800.00	1,497.47	16.81%
001-520-450	Insurance	502.81	502.81	2,281.00	2,281.00	1,778.19	22.04%
001-520-460	Repair & Maintenance	539.60	629.18	1,800.00	1,800.00	1,170.82	34.95%
001-520-490	Other Current Charges	.00	87.00	1,200.00	1,200.00	1,113.00	7.25%
001-520-493	Volunteer Appreciation	.00	.00	650.00	650.00	650.00	.00
001-520-520	Operating Supplies	.00	.00	550.00	550.00	550.00	.00
001-520-521	Uniforms & Clothing	.00	.00	500.00	500.00	500.00	.00
001-520-524	Fuel	37.19	69.35	1,200.00	1,200.00	1,130.65	5.78%
Total PUBLIC SAFETY:		9,704.48	18,967.02	187,515.00	187,515.00	168,547.98	10.11%

Account Number	Account Title	2025 November Actual	2025-25 YTD Actual	2025-26 Current year Budget	2025-26 Amended year Budget	Variance	% Of Budget
FIRE CONTROL\POST OFFICE							
001-522-450	Insurance	1,885.37	1,885.37	8,553.00	8,553.00	6,667.63	22.04%
001-522-460	Repair & Maintenance	28.32	1,219.71	10,000.00	10,000.00	8,780.29	12.20%
Total FIRE CONTROL\POST OFFICE:		1,913.69	3,105.08	18,553.00	18,553.00	15,447.92	16.74%
CODE COMPLIANCE							
001-524-120	Regular Salaries & Wages	554.60	1,109.20	7,209.80	7,209.80	6,100.60	15.38%
001-524-210	FICA Matching	44.54	89.08	552.00	552.00	462.92	16.14%
001-524-220	Retirement Plan	184.34	368.68	2,090.84	2,090.84	1,722.16	17.63%
001-524-230	Health Insurance	61.10	122.20	1,544.00	1,544.00	1,421.80	7.91%
001-524-234	Short-Term Disability	4.36	8.72	125.00	125.00	116.28	6.98%
001-524-240	Workers Compensation	.00	.00	221.00	221.00	221.00	.00
001-524-310	Professional Services	.00	34.23	5,500.00	5,500.00	5,465.77	0.62%
001-524-313	Legal Service	144.00	144.00	5,000.00	5,000.00	4,856.00	2.88%
001-524-420	Postage & Freight	96.78	96.78	925.00	925.00	828.22	10.46%
001-524-450	Insurance	838.09	838.09	3,802.00	3,802.00	2,963.91	22.04%
001-524-490	Other Current Charges	.00	.00	250.00	250.00	250.00	.00
001-524-510	Office Supplies	.00	.00	100.00	100.00	100.00	.00
001-524-513	TM ALLOWANCE	27.70	55.40	660.00	660.00	604.60	8.39%
001-524-550	Seminars And Training	.00	.00	500.00	500.00	500.00	.00
Total CODE COMPLIANCE:		1,955.51	2,866.38	28,479.64	28,479.64	25,613.26	10.06%
GARBAGE/SOLID WASTE SERVICES							
001-534-340	Contractual Services	26,399.98	26,399.98	305,000.00	305,000.00	278,600.02	8.66%
Total GARBAGE/SOLID WASTE SERVICES:		26,399.98	26,399.98	305,000.00	305,000.00	278,600.02	8.66%
PUBLIC WORKS							
001-539-120	Regular Salaries & Wages	3,600.30	7,877.92	51,182.42	51,182.42	43,304.50	15.39%
001-539-140	Overtime	1,242.77	1,417.88	3,500.00	3,500.00	2,082.12	40.51%
001-539-210	FICA Matching	339.78	683.57	4,184.00	4,184.00	3,500.43	16.34%
001-539-220	Retirement Plan	625.38	1,158.78	7,453.21	7,453.21	6,294.43	15.55%
001-539-230	Health Insurance	800.86	1,415.70	8,304.00	8,304.00	6,888.30	17.05%
001-539-234	Short-Term Disability	43.28	86.56	320.00	320.00	233.44	27.05%
001-539-240	Workers Compensation	.00	.00	864.00	864.00	864.00	.00
001-539-340	Contractual Services	370.43	740.86	3,500.00	3,500.00	2,759.14	21.17%
001-539-400	Travel	.00	.00	250.00	250.00	250.00	.00
001-539-410	Telephone	37.45	37.45	570.00	570.00	532.55	6.57%
001-539-430	Utilities	305.13	305.13	1,500.00	1,500.00	1,194.87	20.34%
001-539-450	Insurance	2,042.10	2,042.10	9,264.00	9,264.00	7,221.90	22.04%
001-539-460	Repair & Maintenance	1,650.00	1,728.45	10,000.00	10,000.00	8,271.55	17.28%
001-539-464	Hurricane Repairs	.00	.00	250,000.00	250,000.00	250,000.00	.00
001-539-490	Other Current Charges	.00	103.99	1,000.00	1,000.00	896.01	10.40%
001-539-510	Office Supplies	.00	117.51	200.00	200.00	82.49	58.76%
001-539-520	Operating Supplies	.00	.00	2,500.00	2,500.00	2,500.00	.00
001-539-521	Uniforms & Clothing	.00	.00	750.00	750.00	750.00	.00
001-539-522	Small Tools & Equipment	.00	.00	4,800.00	4,800.00	4,800.00	.00
001-539-524	Fuel	266.12	521.44	6,500.00	6,500.00	5,978.56	8.02%
001-539-540	Subscriptions, Membership	.00	120.49	2,500.00	2,500.00	2,379.51	4.82%
001-539-640	Machinery & Equipment	.00	.00	20,000.00	20,000.00	20,000.00	.00
Total PUBLIC WORKS:		11,323.60	18,357.83	389,141.63	389,141.63	370,783.80	4.72%

Account Number	Account Title	2025 November Actual	2025-25 YTD Actual	2025-26 Current year Budget	2025-26 Amended year Budget	Variance	% Of Budget
ROAD & STREET FACILITIES							
001-541-120	Regular Salaries & Wages	2,795.78	7,480.04	44,404.43	44,404.43	36,924.39	16.85%
001-541-140	Overtime	1,246.93	1,424.47	5,000.00	5,000.00	3,575.53	28.49%
001-541-210	FICA Matching	285.44	653.99	3,780.00	3,780.00	3,126.01	17.30%
001-541-220	Retirement Plan	523.46	934.39	6,733.82	6,733.82	5,799.43	13.88%
001-541-230	Health Insurance	1,046.62	2,093.24	13,500.00	13,500.00	11,406.76	15.51%
001-541-234	Short-Term Disability	36.92	73.84	500.00	500.00	426.16	14.77%
001-541-240	Workers Compensation	.00	.00	720.00	720.00	720.00	.00
001-541-310	Professional Services	.00	.00	2,000.00	2,000.00	2,000.00	.00
001-541-340	Contractual Services	5,458.01	9,168.71	60,000.00	60,000.00	50,831.29	15.28%
001-541-430	Utilities	18.33	18.33	6,500.00	6,500.00	6,481.67	0.28%
001-541-431	Street Lighting - Power	4,558.33	4,558.33	54,000.00	54,000.00	49,441.67	8.44%
001-541-450	Insurance	2,435.36	2,435.36	11,048.00	11,048.00	8,612.64	22.04%
001-541-460	Repair & Maintenance	23.51	723.51	20,000.00	20,000.00	19,276.49	3.62%
001-541-462	Lakes Drain Repair/Maintenance	105.00	771.00	9,200.00	9,200.00	8,429.00	8.38%
001-541-463	Stormwater	.00	.00	3,500.00	3,500.00	3,500.00	.00
001-541-490	Other Current Charges	.00	.00	2,500.00	2,500.00	2,500.00	.00
001-541-520	Operating Supplies	.00	.00	3,500.00	3,500.00	3,500.00	.00
001-541-521	Uniforms & Clothing	.00	.00	750.00	750.00	750.00	.00
001-541-523	Decorations And Flags	.00	595.44	7,500.00	7,500.00	6,904.56	7.94%
001-541-530	Road Materials & Supplies	.00	.00	12,500.00	12,500.00	12,500.00	.00
001-541-630	Infrastructure-Street Repair	3,223.20	3,223.20	228,607.21	228,607.21	225,384.01	1.41%
001-541-640	Vehicle, Equipment & Machinery	.00	.00	25,000.00	25,000.00	25,000.00	.00
Total ROAD & STREET FACILITIES:		21,756.89	34,153.85	521,243.46	521,243.46	487,089.61	6.55%
CEMETERY							
001-569-240	Workers Compensation	.00	.00	380.00	380.00	380.00	.00
001-569-420	Postage & Freight	.00	.00	400.00	400.00	400.00	.00
001-569-450	Insurance	680.88	680.88	3,088.80	3,088.80	2,407.92	22.04%
001-569-460	Repair & Maintenance	.00	.00	2,500.00	2,500.00	2,500.00	.00
001-569-490	Other Current Charges	25.99	25.99	250.00	250.00	224.01	10.40%
001-569-494	Benevolence	.00	.00	500.00	500.00	500.00	.00
001-569-510	Office Supplies	.00	.00	100.00	100.00	100.00	.00
Total CEMETERY:		706.87	706.87	7,218.80	7,218.80	6,511.93	9.79%
LIBRARY							
001-571-120	Regular Salaries & Wages	5,768.14	11,825.68	67,671.58	67,671.58	55,845.90	17.48%
001-571-140	Overtime	859.46	1,019.41	1,500.00	1,500.00	480.59	67.96%
001-571-210	FICA Matching	504.21	977.05	5,292.00	5,292.00	4,314.95	18.46%
001-571-220	Retirement Plan	929.85	1,802.17	9,428.09	9,428.09	7,625.92	19.11%
001-571-230	Health Insurance	277.52	555.04	4,000.00	4,000.00	3,444.96	13.88%
001-571-234	Short-Term Disability	46.62	93.24	800.00	800.00	706.76	11.66%
001-571-240	Workers Compensation	.00	.00	480.00	480.00	480.00	.00
001-571-340	Contractual Services	2,262.05	2,719.48	7,500.00	7,500.00	4,780.52	36.26%
001-571-400	Travel	.00	.00	250.00	250.00	250.00	.00
001-571-410	Telephone	.00	.00	2,400.00	2,400.00	2,400.00	.00
001-571-411	Internet	.00	100.00	15,200.00	15,200.00	15,100.00	0.66%
001-571-420	Postage & Freight	7.47	7.47	250.00	250.00	242.53	2.99%
001-571-430	Utilities	833.31	833.31	4,300.00	4,300.00	3,466.69	19.38%
001-571-450	Insurance	2,147.25	2,147.25	9,741.00	9,741.00	7,593.75	22.04%
001-571-460	Repair & Maintenance	3,098.00	6,976.29	2,500.00	2,500.00	4,476.29	279.05%
001-571-480	Promotional Activities	.00	3,349.71	12,500.00	12,500.00	9,150.29	26.80%
001-571-490	Other Current Charges	.00	105.15	500.00	500.00	394.85	21.03%
001-571-510	Office Supplies	39.70	3,967.91	3,500.00	3,500.00	467.91	113.37%

Account Number	Account Title	2025 November Actual	2025-25 YTD Actual	2025-26 Current year Budget	2025-26 Amended year Budget	Variance	% Of Budget
001-571-520	Operating Supplies	.00	5,437.93	3,500.00	3,500.00	1,937.93-	155.37%
001-571-521	Uniforms & Clothing	315.00	315.00	500.00	500.00	185.00	63.00%
001-571-540	Subscriptions, Membership	.00	.00	750.00	750.00	750.00	.00
001-571-640	Vehicle, Equipment & Machinery	.00	.00	10,000.00	10,000.00	10,000.00	.00
001-571-660	Library Books & Material	349.16	2,742.40	15,000.00	15,000.00	12,257.60	18.28%
Total LIBRARY:		17,437.74	44,974.49	177,562.67	177,562.67	132,588.18	25.33%
PARKS & RECREATION							
001-572-240	Workers Compensation	.00	.00	3,132.00	3,132.00	3,132.00	.00
001-572-340	Contractual Services	4,142.66	5,998.01	30,000.00	30,000.00	24,001.99	19.99%
001-572-345	Contract Mowing/Landscaping	4,198.95	8,397.90	70,000.00	70,000.00	61,602.10	12.00%
001-572-410	Telephone	.00	.00	250.00	250.00	250.00	.00
001-572-411	Internet	160.68	260.68	2,000.00	2,000.00	1,739.32	13.03%
001-572-430	Utilities	254.38	254.38	6,800.00	6,800.00	6,545.62	3.74%
001-572-440	Rentals & Leases	.00	.00	250.00	250.00	250.00	.00
001-572-450	Insurance	5,694.70	5,694.70	25,834.00	25,834.00	20,139.30	22.04%
001-572-460	Repair & Maintenance	134.40	2,884.40	25,000.00	25,000.00	22,115.60	11.54%
001-572-470	Printing & Copying	.00	.00	800.00	800.00	800.00	.00
001-572-490	Other Current Charges	.00	.00	2,465.00	2,465.00	2,465.00	.00
001-572-520	Operating Supplies	.00	.00	20,000.00	20,000.00	20,000.00	.00
001-572-524	Fuel	104.38	172.55	1,200.00	1,200.00	1,027.45	14.38%
001-572-605	Capital Outlay-Benches, Tables	.00	.00	40,000.00	40,000.00	40,000.00	.00
001-572-606	Capital Projects-Stage & Gazebo	.00	.00	.00	.00	.00	.00
001-572-640	Machine & Equipment	.00	.00	7,500.00	7,500.00	7,500.00	.00
001-572-641	Capital - Play Ground Equip	.00	.00	150,000.00	150,000.00	150,000.00	.00
Total PARKS & RECREATION:		14,690.15	23,662.62	385,231.00	385,231.00	361,568.38	6.14%
SPECIAL EVENTS							
001-574-240	Workers Compensation	.00	.00	713.00	713.00	713.00	.00
001-574-450	Insurance	668.80	668.80	3,034.00	3,034.00	2,365.20	22.04%
001-574-481	Montverde Day	9,945.22	55,546.90	88,500.00	88,500.00	32,953.10	62.76%
001-574-482	Light Up Montverde	.00	1,529.76	28,000.00	28,000.00	26,470.24	5.46%
001-574-483	Fall & Spring Concert Series	.00	.00	8,500.00	8,500.00	8,500.00	.00
001-574-484	Easter Event	.00	.00	8,500.00	8,500.00	8,500.00	.00
001-574-485	Trunk or Treat	198.00	4,018.32	5,500.00	5,500.00	1,481.68	73.06%
001-574-486	4th of July and Other Misc	.00	800.00	.00	.00	800.00-	.00
Total SPECIAL EVENTS:		10,812.02	62,563.78	142,747.00	142,747.00	80,183.22	43.83%
GENERAL FUND Expenditure Total:		181,562.44	375,161.91	3,342,795.80	3,342,795.80	2,967,634.49	11.22%
Net Total GENERAL FUND:		181,562.44-	375,161.91-	3,342,795.80-	3,342,795.80-	2,967,634.49-	11.22%

Account Number	Account Title	2025 November Actual	2025-25 YTD Actual	2025-26 Current year Budget	2025-26 Amended year Budget	Variance	% Of Budget
PARKS & REC IMPACT FEE FUND							
PARKS & RECREATION							
140-572-631	Parks & Rec Impact	.00	.00	.00	.00	.00	.00
140-572-635	Parks & Rec Impact	.00	.00	92,000.00	92,000.00	92,000.00	.00
Total PARKS & RECREATION:		.00	.00	92,000.00	92,000.00	92,000.00	.00
PARKS & REC IMPACT FEE FUND Expenditure Total:		.00	.00	92,000.00	92,000.00	92,000.00	.00
Net Total PARKS & REC IMPACT FEE FUND:		.00	.00	92,000.00-	92,000.00-	92,000.00-	.00

Account Number	Account Title	2025 November Actual	2025-25 YTD Actual	2025-26 Current year Budget	2025-26 Amended year Budget	Variance	% Of Budget
ROAD & STREET IMPACT FEE FUND							
Department: 541							
160-541-460	Road & Streets Impact Fees	.00	.00	346,187.26	346,187.26	346,187.26	.00
160-541-464	Road & Streets Impact Fees	.00	.00	350,000.00	350,000.00	350,000.00	.00
Total Department: 541:		.00	.00	696,187.26	696,187.26	696,187.26	.00
ROAD & STREET IMPACT FEE FUND Expenditure Total:							
		.00	.00	696,187.26	696,187.26	696,187.26	.00
Net Total ROAD & STREET IMPACT FEE FUND:							
		.00	.00	696,187.26-	696,187.26-	696,187.26-	.00

Account Number	Account Title	2025 November Actual	2025-25 YTD Actual	2025-26 Current year Budget	2025-26 Amended year Budget	Variance	% Of Budget
ADMINISTRATIVE IMPACT FEE FUND							
Department: 571							
170-571-605	Admin Impact Fee Library C Fwd	.00	.00	100,000.00	100,000.00	100,000.00	.00
170-571-635	Admin Impact Fee - Library	.00	.00	50,000.00	50,000.00	50,000.00	.00
Total Department: 571:		.00	.00	150,000.00	150,000.00	150,000.00	.00
ADMINISTRATIVE IMPACT FEE FUND Expenditure Total:							
		.00	.00	150,000.00	150,000.00	150,000.00	.00
Net Total ADMINISTRATIVE IMPACT FEE FUND:							
		.00	.00	150,000.00-	150,000.00-	150,000.00-	.00

Account Number	Account Title	2025 November Actual	2025-25 YTD Actual	2025-26 Current year Budget	2025-26 Amended year Budget	Variance	% Of Budget
CAPITAL - BOAT RAMP							
PARKS & RECREATION							
330-572-605	Intragovernmental Lake County	.00	.00	100,000.00	100,000.00	100,000.00	.00
330-572-630	LCWA Grant - Boat Ramp	.00	.00	80,000.00	80,000.00	80,000.00	.00
330-572-635	DEP Res Grant	.00	.00	300,000.00	300,000.00	300,000.00	.00
Total PARKS & RECREATION:		.00	.00	480,000.00	480,000.00	480,000.00	.00
CAPITAL - BOAT RAMP Expenditure Total:		.00	.00	480,000.00	480,000.00	480,000.00	.00
Net Total CAPITAL - BOAT RAMP:		.00	.00	480,000.00-	480,000.00-	480,000.00-	.00

Account Number	Account Title	2025 November Actual	2025-25 YTD Actual	2025-26 Current year Budget	2025-26 Amended year Budget	Variance	% Of Budget
CAPITAL - LEAD SERVICE LINE							
WATER UTILITY SERVICES							
341-533-460	REPAIR & MAINTENANCE	.00	.00	42,000.00	42,000.00	42,000.00	.00
Total WATER UTILITY SERVICES:		.00	.00	42,000.00	42,000.00	42,000.00	.00
CAPITAL - LEAD SERVICE LINE Expenditure Total:							
		.00	.00	42,000.00	42,000.00	42,000.00	.00
Net Total CAPITAL - LEAD SERVICE LINE:		.00	.00	42,000.00-	42,000.00-	42,000.00-	.00

Account Number	Account Title	2025 November Actual	2025-25 YTD Actual	2025-26 Current year Budget	2025-26 Amended year Budget	Variance	% Of Budget
FOSGATE TRAIL CONNECTION							
PARKS & RECREATION							
370-572-630	Developer Donations Carry Fwd	.00	.00	100,000.00	100,000.00	100,000.00	.00
Total PARKS & RECREATION:		.00	.00	100,000.00	100,000.00	100,000.00	.00
FOSGATE TRAIL CONNECTION Expenditure Total:							
		.00	.00	100,000.00	100,000.00	100,000.00	.00
Net Total FOSGATE TRAIL CONNECTION:		.00	.00	100,000.00-	100,000.00-	100,000.00-	.00

Account Number	Account Title	2025 November Actual	2025-25 YTD Actual	2025-26 Current year Budget	2025-26 Amended year Budget	Variance	% Of Budget
WATER							
WATER UTILITY SERVICES							
400-533-120	Regular Salaries & Wages	23,380.73	47,946.67	345,930.71	345,930.71	297,984.04	13.86%
400-533-140	Overtime	4,177.28	5,248.08	25,000.00	25,000.00	19,751.92	20.99%
400-533-210	FICA Matching	2,115.38	4,069.02	28,377.00	28,377.00	24,307.98	14.34%
400-533-220	Retirement Plan	4,644.54	8,859.93	50,557.86	50,557.86	41,697.93	17.52%
400-533-230	Health Insurance	4,485.58	8,568.10	47,044.80	47,044.80	38,476.70	18.21%
400-533-234	Short-Term Disability	238.14	476.29	2,592.00	2,592.00	2,115.71	18.38%
400-533-240	Workers Compensation	.00	.00	6,200.00	6,200.00	6,200.00	.00
400-533-310	Professional Services	.00	3,934.50	139,989.58	139,989.58	136,055.08	2.81%
400-533-320	Accounting & Auditing	.00	.00	15,000.00	15,000.00	15,000.00	.00
400-533-340	Contractual Services	6,694.19	9,172.63	100,000.00	100,000.00	90,827.37	9.17%
400-533-350	Municode	.00	.00	2,500.00	2,500.00	2,500.00	.00
400-533-400	Travel	.00	.00	1,500.00	1,500.00	1,500.00	.00
400-533-410	Telephone	152.07	674.38	4,500.00	4,500.00	3,825.62	14.99%
400-533-411	Internet	756.45	856.45	9,000.00	9,000.00	8,143.55	9.52%
400-533-420	Postage & Freight	155.90	155.90	3,500.00	3,500.00	3,344.10	4.45%
400-533-430	Utilities	5,127.11	5,127.11	55,000.00	55,000.00	49,872.89	9.32%
400-533-440	Rentals & Leases	174.36	174.36	3,000.00	3,000.00	2,825.64	5.81%
400-533-450	Insurance	15,188.80	15,188.80	68,904.00	68,904.00	53,715.20	22.04%
400-533-460	Repair & Maintenance	9,952.00	12,681.04	45,000.00	45,000.00	32,318.96	28.18%
400-533-465	Repair & Replace (Retain)	135.54	135.54	10,000.00	10,000.00	9,864.46	1.36%
400-533-470	Printing & Copying	.00	.00	1,200.00	1,200.00	1,200.00	.00
400-533-490	Other Current Charges	7.10	7.10	2,500.00	2,500.00	2,492.90	0.28%
400-533-495	Bank Finance Charges	1,603.64	3,019.27	15,000.00	15,000.00	11,980.73	20.13%
400-533-510	Office Supplies	.00	242.19	1,500.00	1,500.00	1,257.81	16.15%
400-533-513	TM Allowance	193.82	387.64	3,960.00	3,960.00	3,572.36	9.79%
400-533-520	Operating Supplies	2,303.09	5,603.55	22,000.00	22,000.00	16,396.45	25.47%
400-533-521	Uniforms & Clothing	.00	.00	2,000.00	2,000.00	2,000.00	.00
400-533-522	Small Tools & Equipment	.00	.00	5,000.00	5,000.00	5,000.00	.00
400-533-524	Fuel	235.85	574.99	4,500.00	4,500.00	3,925.01	12.78%
400-533-540	Subscriptions, Membership	.00	432.00	5,500.00	5,500.00	5,068.00	7.85%
400-533-550	Seminars And Training	.00	.00	6,000.00	6,000.00	6,000.00	.00
400-533-577	Bulk Water	1,868.82	1,868.82	35,000.00	35,000.00	33,131.18	5.34%
400-533-605	Irrigation Water	.00	.00	35,000.00	35,000.00	35,000.00	.00
400-533-609	Water Meter Replacement	.00	.00	75,000.00	75,000.00	75,000.00	.00
400-533-640	Machinery & Equipment	.00	463.27	30,000.00	30,000.00	29,536.73	1.54%
Total WATER UTILITY SERVICES:		83,590.39	135,867.63	1,207,755.95	1,207,755.95	1,071,888.32	11.25%
WATER Expenditure Total:		83,590.39	135,867.63	1,207,755.95	1,207,755.95	1,071,888.32	11.25%
Net Total WATER:		83,590.39-	135,867.63-	1,207,755.95-	1,207,755.95-	1,071,888.32-	11.25%

Account Number	Account Title	2025 November Actual	2025-25 YTD Actual	2025-26 Current year Budget	2025-26 Amended year Budget	Variance	% Of Budget
WATER IMPACT FEE FUND							
Department: 533							
410-533-605	Water Impact Fees	.00	.00	399,750.00	399,750.00	399,750.00	.00
410-533-635	Water Impact Fees - Carry Fwd	.00	.00	626,019.82	626,019.82	626,019.82	.00
Total Department: 533:		.00	.00	1,025,769.82	1,025,769.82	1,025,769.82	.00
WATER IMPACT FEE FUND Expenditure Total:		.00	.00	1,025,769.82	1,025,769.82	1,025,769.82	.00
Net Total WATER IMPACT FEE FUND:		.00	.00	1,025,769.82-	1,025,769.82-	1,025,769.82-	.00

Account Number	Account Title	2025 November Actual	2025-25 YTD Actual	2025-26 Current year Budget	2025-26 Amended year Budget	Variance	% Of Budget
CAPITAL-WATER ENTERPRISE							
WATER UTILITY SERVICES							
420-533-634	SHAFI Grant	.00	.00	12,717,625.60	12,717,625.60	12,717,625.60	.00
420-533-640	Water Impact Machinery & Equip	.00	.00	.00	.00	.00	.00
Total WATER UTILITY SERVICES:		.00	.00	12,717,625.60	12,717,625.60	12,717,625.60	.00
CAPITAL-WATER ENTERPRISE Expenditure Total:							
		.00	.00	12,717,625.60	12,717,625.60	12,717,625.60	.00
Net Total CAPITAL-WATER ENTERPRISE:		.00	.00	12,717,625.60-	12,717,625.60-	12,717,625.60-	.00

Account Number	Account Title	2025 November Actual	2025-25 YTD Actual	2025-26 Current year Budget	2025-26 Amended year Budget	Variance	% Of Budget
SEWER-ENTERPRISE (WASTE WATER)							
SEWER UTILITY ENTERPRISE							
421-535-120	Regular Salaries & Wages	3,066.05	6,197.52	41,293.89	41,293.89	35,096.37	15.01%
421-535-210	FICA Matching	277.64	527.70	3,159.00	3,159.00	2,631.30	16.70%
421-535-220	Retirement Plan	614.50	1,178.48	5,628.36	5,628.36	4,449.88	20.94%
421-535-230	Health Insurance	582.82	1,134.64	12,046.32	12,046.32	10,911.68	9.42%
421-535-234	Short-Term Disability	26.86	53.72	308.00	308.00	254.28	17.44%
421-535-239	Other Employer Contributions	.00	.00	10.00	10.00	10.00	.00
421-535-240	Workers Compensation	.00	.00	500.00	500.00	500.00	.00
421-535-340	Contractual Services	1,747.31	1,747.31	2,597.41	2,597.41	850.10	67.27%
421-535-430	Utilities	133.66	133.66	.00	.00	133.66-	.00
421-535-460	Repair & Maintenance Res	.00	.00	24,000.00	24,000.00	24,000.00	.00
421-535-470	Printing & Copying	.00	.00	1,677.02	1,677.02	1,677.02	.00
421-535-513	TM Allowance	27.70	55.40	300.00	300.00	244.60	18.47%
421-535-521	Uniforms & Clothing	.00	.00	500.00	500.00	500.00	.00
421-535-576	Bulk Sewer Charges To Clermont	2,933.59	11,573.61	110,000.00	110,000.00	98,426.39	10.52%
Total SEWER UTILITY ENTERPRISE:		9,410.13	22,602.04	202,020.00	202,020.00	179,417.96	11.19%
SEWER-ENTERPRISE (WASTE WATER) Expenditure Total:							
		9,410.13	22,602.04	202,020.00	202,020.00	179,417.96	11.19%
Net Total SEWER-ENTERPRISE (WASTE WATER):							
		9,410.13-	22,602.04-	202,020.00-	202,020.00-	179,417.96-	11.19%

Account Number	Account Title	2025 November Actual	2025-25 YTD Actual	2025-26 Current year Budget	2025-26 Amended year Budget	Variance	% Of Budget
CAPITAL - STORM WATER							
WATER UTILITY SERVICES							
430-533-633	CW35133 - SAHFI Grant - Storm	.00	.00	19,823,318.00	19,823,318.00	19,823,318.00	.00
430-533-634	Grants	.00	.00	339,150.00	339,150.00	339,150.00	.00
430-533-635	State Appropriation	69,461.80	333,831.65	1,117,231.30	1,117,231.30	783,399.65	29.88%
Total WATER UTILITY SERVICES:		69,461.80	333,831.65	21,279,699.30	21,279,699.30	20,945,867.65	1.57%
CAPITAL - STORM WATER Expenditure Total:							
		69,461.80	333,831.65	21,279,699.30	21,279,699.30	20,945,867.65	1.57%
Net Total CAPITAL - STORM WATER:		69,461.80-	333,831.65-	21,279,699.30-	21,279,699.30-	20,945,867.65-	1.57%

Account Number	Account Title	2025 November Actual	2025-25 YTD Actual	2025-26 Current year Budget	2025-26 Amended year Budget	Variance	% Of Budget
CAPITAL - LIBRARY							
LIBRARY							
500-571-120	Regular Salaries & Wages	.00	.00	.00	.00	.00	.00
500-571-210	FICA Matching	.00	.00	.00	.00	.00	.00
500-571-410	Telephone	.00	.00	.00	.00	.00	.00
500-571-605	Intragovernmental Grant - Lib	.00	.00	.00	.00	.00	.00
500-571-635	MV ARPA Funds (w/ Interest)	.00	.00	.00	.00	.00	.00
Total LIBRARY:		.00	.00	.00	.00	.00	.00
CAPITAL - LIBRARY Expenditure Total:		.00	.00	.00	.00	.00	.00
Net Total CAPITAL - LIBRARY:		.00	.00	.00	.00	.00	.00
Net Grand Totals:		344,024.76-	867,463.23-	41,335,853.73-	41,335,853.73-	40,468,391.10-	2.10%

Report Criteria:

Accounts to include: With balances or activity

Print Fund Titles

Page and Total by Fund

Include Sources: None

Print Source Titles

Total by Source

Include Revenues: None

Exclude Departments: 559

Print Department Titles

Total by Department

All Segments Tested for Total Breaks

Report Criteria:

Print Outstanding Checks and Deposits and Bank and Book adjustments

UNITED SOUTHERN (UNITED SOUTHERN - OPERATING) (99)

November 30, 2025

Account: 999101000

Bank Account Number: 1625217

Bank Statement Balance:	4,438,669.26	Book Balance Previous Month:	3,965,179.06
Outstanding Deposits:	5,036.49	Total Receipts:	924,290.98
Outstanding Checks:	61,417.92	Total Disbursements:	507,182.21
Bank Adjustments:	.00	Book Adjustments:	.00
Bank Balance:	4,382,287.83	Book Balance:	4,382,287.83
		Proof (Bank balance less book balance):	.00

Outstanding Deposits Section

Deposit Number	Deposit Amount	Deposit Number	Deposit Amount	Deposit Number	Deposit Amount	Deposit Number	Deposit Amount
990000014	1,022.28	990000014	1,515.62	990000014	857.13	990000014	1,641.46
Grand Totals:							5,036.49

Deposits cleared: 87 items Deposits Outstanding: 4 items

Outstanding Checks Section

Check Number	Check Amount	Check Number	Check Amount	Check Number	Check Amount	Check Number	Check Amount
8	45.83-	21063	2.10	22252	45.00	22929	12.37
23364	85.00	23545	35.00	23674	165.00	23681	60.00
23747	1,197.65	23824	10.00	23887	35.00	24376	411.75
24811	3.10	24895	4,298.67	24903	360.00	25109	165.00
25113	16.83	25142	50.00	25318	7,259.00	25341	100.00
25344	31,792.00	25375	85.30	25451	450.00	25481	3,100.00
25518	2,280.00	25525	1,274.65	25552	270.00	25564	135.81
25569	107.57	25571	7.10	25577	48.30	25578	4,774.57
25579	750.00	25584	220.50	25587	291.99	25591	820.95
25599	100.00	25600	643.54				
Grand Totals:							61,417.92

Checks cleared: 140 items Checks Outstanding: 38 items

Bank Adjustments SectionBook Adjustments Section



PO Drawer 29
Umatilla FL 32784

TOWN OF MONTVERDE
OPERATING ACCOUNT
PO BOX 560008
MONTVERDE FL 34756-0008

Statement Ending 11/28/2025

Page 1 of 20

Managing Your Accounts



Branch Clermont



Customer Care Center (352)669-2121



Online Access www.unitedsouthernbank.com



Daisy (877) 612-8725

Summary of Accounts

Account Type	Account Number	Ending Balance
PUBLIC FUNDS INTERES	XXXXXX5217	\$4,438,669.26

PUBLIC FUNDS INTERES - XXXXXX5217

Account Summary

Date	Description	Amount
11/01/2025	Beginning Balance	\$4,374,422.13
	77 Credit(s) This Period	\$921,869.98
	135 Debit(s) This Period	\$857,622.85
11/28/2025	Ending Balance	\$4,438,669.26

Interest Summary

Description	Amount
Interest Earned From 11/01/2025 Through 11/28/2025	
Annual Percentage Yield Earned	0.75%
Interest Days	28
Interest Earned	\$2,465.02
Interest Paid This Period	\$2,465.02
Interest Paid Year-to-Date	\$36,772.21

Account Activity

Post Date	Description	Debits	Credits	Balance
11/01/2025	Beginning Balance			\$4,374,422.13
11/03/2025	REMOTE DEPOSIT		\$4,166.57	\$4,378,588.70
11/03/2025	MERCHANT BANKCD DEPOSIT 496254713886		\$864.11	\$4,379,452.81
11/03/2025	MERCHANT BANKCD DEPOSIT 496254713886		\$1,573.52	\$4,381,026.33
11/03/2025	MERCHANT BANKCD DEPOSIT 496254713886		\$1,751.38	\$4,382,777.71
11/03/2025	MERCHANT BANKCD DEPOSIT 496510043888	\$220.46		\$4,382,557.25
11/03/2025	MERCHANT BANKCD DEPOSIT 496254713886	\$1,583.64		\$4,380,973.61
11/03/2025	CHECK # 25488	\$416.31		\$4,380,557.30
11/03/2025	CHECK # 25501	\$750.00		\$4,379,807.30
11/03/2025	CHECK # 25466	\$800.00		\$4,379,007.30
11/03/2025	CHECK # 25487	\$2,004.36		\$4,377,002.94
11/03/2025	CHECK # 25489	\$4,364.52		\$4,372,638.42
11/03/2025	CHECK # 25492	\$11,590.00		\$4,361,048.42
11/04/2025	REMOTE DEPOSIT		\$424.69	\$4,361,473.11
11/04/2025	MERCHANT BANKCD DEPOSIT 496599721883		\$50.00	\$4,361,523.11
11/04/2025	MERCHANT BANKCD DEPOSIT 496254713886		\$501.40	\$4,362,024.51
11/04/2025	MERCHANT BANKCD DEPOSIT 496510043888		\$730.74	\$4,362,755.25
11/04/2025	CHECK # 25506	\$666.00		\$4,362,089.25



BEFORE YOU START

[illegible]

PUBLIC FUNDS INTERES - XXXXXX5217 (continued)
Account Activity (continued)

Post Date	Description	Debits	Credits	Balance
11/04/2025	CHECK # 25498	\$789.50		\$4,361,299.75
11/04/2025	CHECK # 25418	\$995.00		\$4,360,304.75
11/04/2025	CHECK # 25480	\$1,124.00		\$4,359,180.75
11/04/2025	CHECK # 25494	\$1,253.03		\$4,357,927.72
11/04/2025	CHECK # 25490	\$1,852.16		\$4,356,075.56
11/04/2025	CHECK # 25483	\$2,406.50		\$4,353,669.06
11/04/2025	CHECK # 25510	\$3,934.50		\$4,349,734.56
11/05/2025	REMOTE DEPOSIT		\$297.96	\$4,350,032.52
11/05/2025	REMOTE DEPOSIT		\$9,350.00	\$4,359,382.52
11/05/2025	MERCHANT BANKCD DEPOSIT 496599721883		\$185.00	\$4,359,567.52
11/05/2025	MERCHANT BANKCD DEPOSIT 496510043888		\$836.21	\$4,360,403.73
11/05/2025	MERCHANT BANKCD DEPOSIT 496254713886		\$2,120.40	\$4,362,524.13
11/05/2025	STATE OF FLORIDA PAYMENTS 157928980256664		\$16,030.79	\$4,378,554.92
11/05/2025	CHECK # 25461	\$800.00		\$4,377,754.92
11/05/2025	CHECK # 25509	\$694.79		\$4,377,060.13
11/05/2025	CHECK # 25496	\$2,100.00		\$4,374,960.13
11/05/2025	CHECK # 25458	\$3,500.00		\$4,371,460.13
11/05/2025	CHECK # 25512	\$9,612.60		\$4,361,847.53
11/06/2025	REMOTE DEPOSIT		\$414.78	\$4,362,262.31
11/06/2025	MERCHANT BANKCD DEPOSIT 496254713886		\$2,425.38	\$4,364,687.69
11/06/2025	CHECK # 25499	\$2,245.00		\$4,362,442.69
11/06/2025	CHECK # 25477	\$48.30		\$4,362,394.39
11/06/2025	CHECK # 25493	\$139.80		\$4,362,254.59
11/06/2025	CHECK # 25486	\$220.50		\$4,362,034.09
11/06/2025	CHECK # 25491	\$960.00		\$4,361,074.09
11/06/2025	CHECK # 25495	\$965.44		\$4,360,108.65
11/07/2025	MERCHANT BANKCD DEPOSIT 496599721883		\$185.00	\$4,360,293.65
11/07/2025	MERCHANT BANKCD DEPOSIT 496254713886		\$22,980.48	\$4,383,274.13
11/07/2025	TOWN OF MONTVERD ACH FEE XXXXXX3358	\$5.00		\$4,383,269.13
11/07/2025	IRS USATAXPYMT 270571164762307	\$6,550.11		\$4,376,719.02
11/07/2025	TOWN OF MONTVERD PAYROLL 0	\$24,059.67		\$4,352,659.35
11/07/2025	CHECK # 29905	\$997.04		\$4,351,662.31
11/07/2025	CHECK # 25484	\$1,050.00		\$4,350,612.31
11/10/2025	REMOTE DEPOSIT		\$1,328.75	\$4,351,941.06
11/10/2025	DEPOSIT		\$8,621.00	\$4,360,562.06
11/10/2025	MERCHANT BANKCD DEPOSIT 496254713886		\$764.03	\$4,361,326.09
11/10/2025	MERCHANT BANKCD DEPOSIT 496254713886		\$1,671.96	\$4,362,998.05
11/10/2025	MERCHANT BANKCD DEPOSIT 496254713886		\$1,681.43	\$4,364,679.48
11/10/2025	FMPTF ACH Collec 8973789	\$3,522.98		\$4,361,156.50
11/10/2025	CHECK # 25457	\$375.00		\$4,360,781.50
11/10/2025	CHECK # 25414	\$400.00		\$4,360,381.50
11/10/2025	CHECK # 25452	\$1,850.00		\$4,358,531.50
11/10/2025	CHECK # 25502	\$2,400.00		\$4,356,131.50
11/12/2025	REMOTE DEPOSIT		\$209.92	\$4,356,341.42

PUBLIC FUNDS INTERES - XXXXXX5217 (continued)
Account Activity (continued)

Post Date	Description	Debits	Credits	Balance
11/12/2025	REMOTE DEPOSIT		\$5,275.00	\$4,361,616.42
11/12/2025	REMOTE DEPOSIT		\$7,757.82	\$4,369,374.24
11/12/2025	REMOTE DEPOSIT		\$16,800.00	\$4,386,174.24
11/12/2025	MERCHANT BANKCD DEPOSIT 496510043888		\$421.09	\$4,386,595.33
11/12/2025	MERCHANT BANKCD DEPOSIT 496510043888		\$468.60	\$4,387,063.93
11/12/2025	MERCHANT BANKCD DEPOSIT 496254713886		\$971.08	\$4,388,035.01
11/12/2025	MERCHANT BANKCD DEPOSIT 496254713886		\$3,934.12	\$4,391,969.13
11/12/2025	CHECK # 25373	\$118.21		\$4,391,850.92
11/12/2025	CHECK # 25382	\$884.00		\$4,390,966.92
11/12/2025	CHECK # 25459	\$1,600.00		\$4,389,366.92
11/12/2025	CHECK # 25453	\$2,000.00		\$4,387,366.92
11/12/2025	CHECK # 25485	\$2,500.00		\$4,384,866.92
11/13/2025	REMOTE DEPOSIT		\$281.46	\$4,385,148.38
11/13/2025	MERCHANT BANKCD DEPOSIT 496510043888		\$656.14	\$4,385,804.52
11/13/2025	MERCHANT BANKCD DEPOSIT 496254713886		\$1,548.52	\$4,387,353.04
11/13/2025	SUMTER ELECTRIC AP PAYMENT 3417		\$4,720.04	\$4,392,073.08
11/13/2025	CHECK # 25555	\$1,761.00		\$4,390,312.08
11/13/2025	CHECK # 25544	\$2,454.30		\$4,387,857.78
11/13/2025	CHECK # 25454	\$4,690.00		\$4,383,167.78
11/14/2025	MERCHANT BANKCD DEPOSIT 496510043888		\$1,359.34	\$4,384,527.12
11/14/2025	MERCHANT BANKCD DEPOSIT 496254713886		\$1,389.66	\$4,385,916.78
11/14/2025	CHECK # 25521	\$25.76		\$4,385,891.02
11/14/2025	CHECK # 25504	\$1,080.00		\$4,384,811.02
11/14/2025	CHECK # 25441	\$1,350.00		\$4,383,461.02
11/17/2025	MERCHANT BANKCD DEPOSIT 496510043888		\$134.23	\$4,383,595.25
11/17/2025	MERCHANT BANKCD DEPOSIT 496254713886		\$679.72	\$4,384,274.97
11/17/2025	MERCHANT BANKCD DEPOSIT 496254713886		\$801.15	\$4,385,076.12
11/17/2025	MERCHANT BANKCD DEPOSIT 496254713886		\$7,862.33	\$4,392,938.45
11/17/2025	TOWN OF MONTVERD UTIL 0		\$26,527.13	\$4,419,465.58
11/17/2025	TOWN OF MONTVERD ACH FEE XXXXXX3358	\$5.00		\$4,419,460.58
11/17/2025	CHECK # 25533	\$2,555.60		\$4,416,904.98
11/17/2025	CHECK # 25541	\$3,014.00		\$4,413,890.98
11/17/2025	CHECK # 25551	\$128.43		\$4,413,762.55
11/17/2025	CHECK # 25524	\$248.06		\$4,413,514.49
11/17/2025	CHECK # 25517	\$315.00		\$4,413,199.49
11/17/2025	CHECK # 25540	\$809.40		\$4,412,390.09
11/17/2025	CHECK # 25519	\$900.00		\$4,411,490.09
11/17/2025	CHECK # 25503	\$1,090.03		\$4,410,400.06
11/17/2025	CHECK # 25479	\$1,292.75		\$4,409,107.31
11/17/2025	CHECK # 25554	\$1,868.82		\$4,407,238.49
11/17/2025	CHECK # 25546	\$2,170.00		\$4,405,068.49
11/17/2025	CHECK # 25556	\$3,096.48		\$4,401,972.01
11/17/2025	CHECK # 25425	\$9,765.00		\$4,392,207.01
11/17/2025	CHECK # 25514	\$264,369.85		\$4,127,837.16

PUBLIC FUNDS INTERES - XXXXXX5217 (continued)
Account Activity (continued)

Post Date	Description	Debits	Credits	Balance
11/18/2025	REMOTE DEPOSIT		\$2,477.73	\$4,130,314.89
11/18/2025	REMOTE DEPOSIT		\$4,724.91	\$4,135,039.80
11/18/2025	PER REQ BY PAUL FROM 7890 TO 5217 MVD TICKET SQUARE SALES		\$3,437.74	\$4,138,477.54
11/18/2025	MERCHANT BANKCD DEPOSIT 496254713886		\$788.85	\$4,139,266.39
11/18/2025	STATE OF FLORIDA PAYMENTS 157928980282047		\$6,924.40	\$4,146,190.79
11/18/2025	LAKE COUNTY TAX VENDOR 218		\$10,960.16	\$4,157,150.95
11/18/2025	CHECK # 25538	\$20.00		\$4,157,130.95
11/18/2025	CHECK # 25536	\$83.13		\$4,157,047.82
11/18/2025	CHECK # 25550	\$500.00		\$4,156,547.82
11/18/2025	CHECK # 25527	\$646.00		\$4,155,901.82
11/18/2025	CHECK # 25543	\$789.50		\$4,155,112.32
11/18/2025	CHECK # 25526	\$864.18		\$4,154,248.14
11/18/2025	CHECK # 25539	\$1,200.00		\$4,153,048.14
11/18/2025	CHECK # 25557	\$1,878.53		\$4,151,169.61
11/18/2025	CHECK # 25530	\$2,626.84		\$4,148,542.77
11/18/2025	CHECK # 25523	\$2,933.59		\$4,145,609.18
11/18/2025	CHECK # 25460	\$5,596.43		\$4,140,012.75
11/18/2025	CHECK # 25568	\$7,845.40		\$4,132,167.35
11/18/2025	CHECK # 25562	\$9,765.00		\$4,122,402.35
11/18/2025	CHECK # 25559	\$26,399.98		\$4,096,002.37
11/18/2025	CHECK # 25561	\$31,880.00		\$4,064,122.37
11/18/2025	CHECK # 25560	\$37,581.80		\$4,026,540.57
11/19/2025	REMOTE DEPOSIT		\$3,409.43	\$4,029,950.00
11/19/2025	MERCHANT BANKCD DEPOSIT 496254713886		\$1,901.78	\$4,031,851.78
11/19/2025	CHECK # 25516	\$5,625.00		\$4,026,226.78
11/19/2025	CHECK # 25567	\$96.86		\$4,026,129.92
11/19/2025	CHECK # 25537	\$100.08		\$4,026,029.84
11/19/2025	CHECK # 25553	\$105.00		\$4,025,924.84
11/19/2025	CHECK # 25563	\$134.95		\$4,025,789.89
11/19/2025	CHECK # 25535	\$188.92		\$4,025,600.97
11/19/2025	CHECK # 25534	\$240.00		\$4,025,360.97
11/19/2025	CHECK # 25558	\$341.86		\$4,025,019.11
11/19/2025	CHECK # 25531	\$664.00		\$4,024,355.11
11/19/2025	CHECK # 25570	\$999.00		\$4,023,356.11
11/19/2025	CHECK # 25522	\$1,124.00		\$4,022,232.11
11/19/2025	CHECK # 25542	\$1,555.00		\$4,020,677.11
11/19/2025	CHECK # 25549	\$2,411.27		\$4,018,265.84
11/20/2025	REMOTE DEPOSIT		\$1,270.26	\$4,019,536.10
11/20/2025	MERCHANT BANKCD DEPOSIT 496599721883		\$10.00	\$4,019,546.10
11/20/2025	MERCHANT BANKCD DEPOSIT 496510043888		\$652.06	\$4,020,198.16
11/20/2025	MERCHANT BANKCD DEPOSIT 496254713886		\$9,246.31	\$4,029,444.47
11/20/2025	Colonial Life Pay-In for 122614011744341	\$857.38		\$4,028,587.09
11/20/2025	CHECK # 25545	\$174.36		\$4,028,412.73

PUBLIC FUNDS INTERES - XXXXXX5217 (continued)
Account Activity (continued)

Post Date	Description	Debits	Credits	Balance
11/21/2025	STATE OF FLORIDA PAYMENTS 157928980292625		\$97.89	\$4,028,510.62
11/21/2025	MERCHANT BANKCD DEPOSIT 496254713886		\$1,575.36	\$4,030,085.98
11/21/2025	STATE OF FLORIDA PAYMENTS 157928980291640		\$7,459.79	\$4,037,545.77
11/21/2025	DE Florida Other EDI PYMNTS AP0002425695		\$26,515.80	\$4,064,061.57
11/21/2025	TOWN OF MONTVERD ACH FEE XXXXXX3358	\$5.00		\$4,064,056.57
11/21/2025	UNITED HEALTHCAR EDI PAYMTS 744641288342	\$355.42		\$4,063,701.15
11/21/2025	IRS USATAXPYMT 270572574291090	\$9,440.86		\$4,054,260.29
11/21/2025	FLA DEPT REVENUE CRC XXXXX8064	\$10,069.14		\$4,044,191.15
11/21/2025	TOWN OF MONTVERD PAYROLL 0	\$32,722.97		\$4,011,468.18
11/21/2025	CHECK # 25547	\$138.93		\$4,011,329.25
11/21/2025	CHECK # 25590	\$440.75		\$4,010,888.50
11/21/2025	CHECK # 25597	\$468.00		\$4,010,420.50
11/21/2025	CHECK # 25548	\$1,333.55		\$4,009,086.95
11/21/2025	CHECK # 25566	\$4,048.54		\$4,005,038.41
11/21/2025	CHECK # 25528	\$9,539.25		\$3,995,499.16
11/21/2025	CHECK # 25532	\$40,438.00		\$3,955,061.16
11/24/2025	REMOTE DEPOSIT		\$429,378.05	\$4,384,439.21
11/24/2025	MERCHANT BANKCD DEPOSIT 496254713886		\$1,469.24	\$4,385,908.45
11/24/2025	MERCHANT BANKCD DEPOSIT 496254713886		\$3,826.53	\$4,389,734.98
11/24/2025	PITNEY BOWES POSTAGE 28578011	\$1,000.00		\$4,388,734.98
11/24/2025	FMPTF ACH Collec 9005241	\$3,515.92		\$4,385,219.06
11/24/2025	CHECK # 25409	\$150.00		\$4,385,069.06
11/24/2025	CHECK # 25515	\$52.22		\$4,385,016.84
11/24/2025	CHECK # 25565	\$67.47		\$4,384,949.37
11/24/2025	CHECK # 25520	\$157.16		\$4,384,792.21
11/24/2025	CHECK # 25589	\$363.15		\$4,384,429.06
11/24/2025	CHECK # 25576	\$461.75		\$4,383,967.31
11/24/2025	CHECK # 25598	\$4,699.00		\$4,379,268.31
11/24/2025	CHECK # 25572	\$14,300.00		\$4,364,968.31
11/25/2025	REMOTE DEPOSIT		\$100.00	\$4,365,068.31
11/25/2025	REMOTE DEPOSIT		\$4,631.50	\$4,369,699.81
11/25/2025	REMOTE DEPOSIT		\$130,782.89	\$4,500,482.70
11/25/2025	MERCHANT BANKCD DEPOSIT 496254713886		\$885.53	\$4,501,368.23
11/25/2025	MERCHANT BANKCD DEPOSIT 496510043888		\$1,067.36	\$4,502,435.59
11/25/2025	STATE OF FLORIDA PAYMENTS 157928980299141		\$5,557.11	\$4,507,992.70
11/25/2025	STATE OF FLORIDA PAYMENTS 157928980299485		\$15,590.89	\$4,523,583.59
11/25/2025	CHECK # 25592	\$42.42		\$4,523,541.17
11/25/2025	CHECK # 25581	\$265.10		\$4,523,276.07
11/25/2025	CHECK # 25593	\$282.61		\$4,522,993.46
11/25/2025	CHECK # 25323	\$360.00		\$4,522,633.46
11/25/2025	CHECK # 25582	\$1,259.00		\$4,521,374.46
11/25/2025	CHECK # 25529	\$1,261.00		\$4,520,113.46
11/25/2025	CHECK # 25583	\$3,223.20		\$4,516,890.26
11/25/2025	CHECK # 25594	\$17,049.33		\$4,499,840.93

PUBLIC FUNDS INTERES - XXXXXX5217 (continued)
Account Activity (continued)

Post Date	Description	Debits	Credits	Balance
11/26/2025	DEPOSIT		\$749.35	\$4,500,590.28
11/26/2025	MERCHANT BANKCD DEPOSIT 496510043888		\$650.29	\$4,501,240.57
11/26/2025	MERCHANT BANKCD DEPOSIT 496254713886		\$1,061.81	\$4,502,302.38
11/26/2025	STATE OF FLORIDA PAYMENTS 157928980304155		\$11,523.17	\$4,513,825.55
11/26/2025	CHECK # 25588	\$125.00		\$4,513,700.55
11/26/2025	CHECK # 25595	\$270.00		\$4,513,430.55
11/26/2025	CHECK # 25456	\$600.00		\$4,512,830.55
11/26/2025	CHECK # 25596	\$1,815.73		\$4,511,014.82
11/26/2025	CHECK # 25585	\$1,852.16		\$4,509,162.66
11/26/2025	CHECK # 25455	\$3,000.00		\$4,506,162.66
11/26/2025	CHECK # 25580	\$10,483.86		\$4,495,678.80
11/26/2025	CHECK # 25575	\$12,124.00		\$4,483,554.80
11/26/2025	CHECK # 25586	\$117,155.40		\$4,366,399.40
11/28/2025	MERCHANT BANKCD DEPOSIT 496599721883		\$284.00	\$4,366,683.40
11/28/2025	MERCHANT BANKCD DEPOSIT 496254713886		\$430.31	\$4,367,113.71
11/28/2025	MERCHANT BANKCD DEPOSIT 496254713886		\$2,020.91	\$4,369,134.62
11/28/2025	LAKE COUNTY TAX VENDOR 218		\$67,190.62	\$4,436,325.24
11/28/2025	Monthly ACH Fee ACH Fee 16 MONTVERDE	\$25.00		\$4,436,300.24
11/28/2025	CHECK # 25574	\$96.00		\$4,436,204.24
11/28/2025	INTEREST		\$2,465.02	\$4,438,669.26
11/28/2025	Ending Balance			\$4,438,669.26

Checks Cleared

Check Nbr	Date	Amount	Check Nbr	Date	Amount	Check Nbr	Date	Amount
25323	11/25/2025	\$360.00	25484	11/07/2025	\$1,050.00	25514*	11/17/2025	\$264,369.85
25373*	11/12/2025	\$118.21	25485	11/12/2025	\$2,500.00	25515	11/24/2025	\$52.22
25382*	11/12/2025	\$884.00	25486	11/06/2025	\$220.50	25516	11/19/2025	\$5,625.00
25409*	11/24/2025	\$150.00	25487	11/03/2025	\$2,004.36	25517	11/17/2025	\$315.00
25414*	11/10/2025	\$400.00	25488	11/03/2025	\$416.31	25519*	11/17/2025	\$900.00
25418*	11/04/2025	\$995.00	25489	11/03/2025	\$4,364.52	25520	11/24/2025	\$157.16
25425*	11/17/2025	\$9,765.00	25490	11/04/2025	\$1,852.16	25521	11/14/2025	\$25.76
25441*	11/14/2025	\$1,350.00	25491	11/06/2025	\$960.00	25522	11/19/2025	\$1,124.00
25452*	11/10/2025	\$1,850.00	25492	11/03/2025	\$11,590.00	25523	11/18/2025	\$2,933.59
25453	11/12/2025	\$2,000.00	25493	11/06/2025	\$139.80	25524	11/17/2025	\$248.06
25454	11/13/2025	\$4,690.00	25494	11/04/2025	\$1,253.03	25526*	11/18/2025	\$864.18
25455	11/26/2025	\$3,000.00	25495	11/06/2025	\$965.44	25527	11/18/2025	\$646.00
25456	11/26/2025	\$600.00	25496	11/05/2025	\$2,100.00	25528	11/21/2025	\$9,539.25
25457	11/10/2025	\$375.00	25498*	11/04/2025	\$789.50	25529	11/25/2025	\$1,261.00
25458	11/05/2025	\$3,500.00	25499	11/06/2025	\$2,245.00	25530	11/18/2025	\$2,626.84
25459	11/12/2025	\$1,600.00	25501*	11/03/2025	\$750.00	25531	11/19/2025	\$664.00
25460	11/18/2025	\$5,596.43	25502	11/10/2025	\$2,400.00	25532	11/21/2025	\$40,438.00
25461	11/05/2025	\$800.00	25503	11/17/2025	\$1,090.03	25533	11/17/2025	\$2,555.60
25466*	11/03/2025	\$800.00	25504	11/14/2025	\$1,080.00	25534	11/19/2025	\$240.00
25477*	11/06/2025	\$48.30	25506*	11/04/2025	\$666.00	25535	11/19/2025	\$188.92
25479*	11/17/2025	\$1,292.75	25509*	11/05/2025	\$694.79	25536	11/18/2025	\$83.13
25480	11/04/2025	\$1,124.00	25510	11/04/2025	\$3,934.50	25537	11/19/2025	\$100.08
25483*	11/04/2025	\$2,406.50	25512*	11/05/2025	\$9,612.60	25538	11/18/2025	\$20.00

PUBLIC FUNDS INTERES - XXXXXX5217 (continued)

Checks Cleared (continued)

Check Nbr	Date	Amount	Check Nbr	Date	Amount	Check Nbr	Date	Amount
25539	11/18/2025	\$1,200.00	25557	11/18/2025	\$1,878.53	25581	11/25/2025	\$265.10
25540	11/17/2025	\$809.40	25558	11/19/2025	\$341.86	25582	11/25/2025	\$1,259.00
25541	11/17/2025	\$3,014.00	25559	11/18/2025	\$26,399.98	25583	11/25/2025	\$3,223.20
25542	11/19/2025	\$1,555.00	25560	11/18/2025	\$37,581.80	25585*	11/26/2025	\$1,852.16
25543	11/18/2025	\$789.50	25561	11/18/2025	\$31,880.00	25586	11/26/2025	\$117,155.40
25544	11/13/2025	\$2,454.30	25562	11/18/2025	\$9,765.00	25588*	11/26/2025	\$125.00
25545	11/20/2025	\$174.36	25563	11/19/2025	\$134.95	25589	11/24/2025	\$363.15
25546	11/17/2025	\$2,170.00	25565*	11/24/2025	\$67.47	25590	11/21/2025	\$440.75
25547	11/21/2025	\$138.93	25566	11/21/2025	\$4,048.54	25592*	11/25/2025	\$42.42
25548	11/21/2025	\$1,333.55	25567	11/19/2025	\$96.86	25593	11/25/2025	\$282.61
25549	11/19/2025	\$2,411.27	25568	11/18/2025	\$7,845.40	25594	11/25/2025	\$17,049.33
25550	11/18/2025	\$500.00	25570*	11/19/2025	\$999.00	25595	11/26/2025	\$270.00
25551	11/17/2025	\$128.43	25572*	11/24/2025	\$14,300.00	25596	11/26/2025	\$1,815.73
25553*	11/19/2025	\$105.00	25574*	11/28/2025	\$96.00	25597	11/21/2025	\$468.00
25554	11/17/2025	\$1,868.82	25575	11/26/2025	\$12,124.00	25598	11/24/2025	\$4,699.00
25555	11/13/2025	\$1,761.00	25576	11/24/2025	\$461.75	29905*	11/07/2025	\$997.04
25556	11/17/2025	\$3,096.48	25580*	11/26/2025	\$10,483.86			

* Indicates skipped check number

Overdraft and Returned Item Fees

	Total for this period	Total year-to-date
Total Overdraft Fees	\$0.00	\$0.00
Total Returned Item Fees	\$0.00	\$0.00

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PO Drawer 29
Umatilla FL 32784

TOWN OF MONTVERDE
PO BOX 560008
MONTVERDE FL 34756-0008

Statement Ending 11/28/2025

Page 1 of 2

Managing Your Accounts



Branch Clermont



Customer Care Center (352)669-2121



Online Access www.unitedsouthernbank.com



Daisy (877) 612-8725

Summary of Accounts

Account Type	Account Number	Ending Balance
PUBLIC FUNDS INTERES	XXXXXX7890	\$1,000.44

PUBLIC FUNDS INTERES - XXXXXX7890

Account Summary

Date	Description	Amount
11/01/2025	Beginning Balance	\$1,000.43
	3 Credit(s) This Period	\$3,437.76
	2 Debit(s) This Period	\$3,437.75
11/28/2025	Ending Balance	\$1,000.44

Interest Summary

Description	Amount
Interest Earned From 11/01/2025 Through 11/28/2025	
Annual Percentage Yield Earned	0.01%
Interest Days	28
Interest Earned	\$0.01
Interest Paid This Period	\$0.01
Interest Paid Year-to-Date	\$0.11

Account Activity

Post Date	Description	Debits	Credits	Balance
11/01/2025	Beginning Balance			\$1,000.43
11/07/2025	Square Inc ACCTVERIFY T3WKWNFWJ67J6H3		\$0.01	\$1,000.44
11/07/2025	Square Inc ACCTVERIFY T366C8NJB84FMDR	\$0.01		\$1,000.43
11/14/2025	Square Inc SQ251114 T3A798QF0YDJXXS		\$3,437.74	\$4,438.17
11/18/2025	PER REQ BY PAUL FROM 7890 TO 5217 MVD TICKET SQUARE SALES	\$3,437.74		\$1,000.43
11/28/2025	INTEREST		\$0.01	\$1,000.44
11/28/2025	Ending Balance			\$1,000.44

Overdraft and Returned Item Fees

	Total for this period	Total year-to-date
Total Overdraft Fees	\$0.00	\$0.00
Total Returned Item Fees	\$0.00	\$0.00



WITHDRAWALS OUTSTANDING
NOT CHARGED TO ACCOUNT

[illegible]

Please examine immediately and report if incorrect, if no reply is received within **60** days the account will be considered correct.

Telephone or write us at the telephone number or address located on the front of this statement as soon as you can. If you think your statement or receipt is wrong or if you need more information about a transfer on the statement or receipt, we must hear from you no later than **60 days** after we sent you the **FIRST** statement on which the error or problem appeared.

- (1) Tell us your name and account number (if any).
- (2) Describe the error or the transfer you are unsure about, and explain as clearly as you can why you believe there is an error or why you need more information.
- (3) Tell us the dollar amount of the suspected error.

We will investigate your complaint and will correct any error promptly. If we take more than 10 business days to do this, we will recredit your account for the amount you think is in error, so that you will have use of the money during the time it takes us to complete our investigation.

USB cares about your privacy. For your convenience our Privacy Notice is available at <https://www.unitedsouthernbank.com/privacy.htm>. If you would like a printed copy, please contact customer service at 352-669-2121.

Report Criteria:

Includes all check types
Includes unprinted checks

Pay Period Date	Journal Code	Check Issue Date	Check Number	Payee	Payee ID	Description	GL Account	Amount	D
11/04/2025	PC	11/07/2025	724	GIFFORD, KATHLEEN P	3		999-101000	1,615.33-	D
11/04/2025	PC	11/07/2025	725	DAITNARAYAN, DIAWANTIE	8		999-101000	1,955.28-	D
11/04/2025	PC	11/07/2025	726	COWAN, BILLIE	16		999-101000	827.20-	D
11/04/2025	PC	11/07/2025	727	MACK, CHARLES	36		999-101000	2,560.51-	D
11/04/2025	PC	11/07/2025	728	LARINO, DOMINGO	58		999-101000	4,268.39-	D
11/04/2025	PC	11/07/2025	729	JOHNSON, SANDRA	63		999-101000	2,217.41-	D
11/04/2025	PC	11/07/2025	730	SMITH, ALLEN	66		999-101000	1,829.24-	D
11/04/2025	PC	11/07/2025	731	YANG, MAI	67		999-101000	2,235.58-	D
11/04/2025	PC	11/07/2025	732	MILEY, HILARY	68		999-101000	501.60-	D
11/04/2025	PC	11/07/2025	733	GAFFNEY, COREY	75		999-101000	1,547.33-	D
11/04/2025	PC	11/07/2025	734	MCINTYRE, MELISSA	77		999-101000	1,544.59-	D
11/04/2025	PC	11/07/2025	735	TREPANIER, CAROLINE	78		999-101000	1,507.18-	D
11/04/2025	PC	11/07/2025	736	BROWN, NATHANIEL	80		999-101000	1,450.03-	D
11/18/2025	PC	11/21/2025	737	GIFFORD, KATHLEEN P	3		999-101000	2,104.35-	D
11/18/2025	PC	11/21/2025	738	DAITNARAYAN, DIAWANTIE	8		999-101000	2,536.50-	D
11/18/2025	PC	11/21/2025	739	COWAN, BILLIE	16		999-101000	1,097.15-	D
11/18/2025	PC	11/21/2025	740	ROBERTS, GRANT	24		999-101000	461.75-	D
11/18/2025	PC	11/21/2025	741	MACK, CHARLES	36		999-101000	3,687.45-	D
11/18/2025	PC	11/21/2025	742	LARINO, DOMINGO	58		999-101000	4,268.39-	D
11/18/2025	PC	11/21/2025	743	JOHNSON, SANDRA	63		999-101000	3,056.35-	D
11/18/2025	PC	11/21/2025	744	SMITH, ALLEN	66		999-101000	2,310.48-	D
11/18/2025	PC	11/21/2025	745	YANG, MAI	67		999-101000	3,110.45-	D
11/18/2025	PC	11/21/2025	746	MILEY, HILARY	68		999-101000	714.23-	D
11/18/2025	PC	11/21/2025	747	WYNKOOP, JOSEPH	69		999-101000	923.50-	D
11/18/2025	PC	11/21/2025	748	WOMACK, CAROL	73		999-101000	507.92-	D
11/18/2025	PC	11/21/2025	749	GAFFNEY, COREY	75		999-101000	1,499.58-	D
11/18/2025	PC	11/21/2025	750	MORGANELLI, JOSEPH	76		999-101000	461.75-	D
11/18/2025	PC	11/21/2025	751	MCINTYRE, MELISSA	77		999-101000	1,987.26-	D
11/18/2025	PC	11/21/2025	752	TREPANIER, CAROLINE	78		999-101000	2,131.48-	D
11/18/2025	PC	11/21/2025	753	BROWN, NATHANIEL	80		999-101000	1,864.38-	D
11/18/2025	PC	11/21/2025	25576	RUBIO, BRYAN	81		999-101000	461.75-	
11/04/2025	CDPT	11/07/2025	1010476	Florida Municipal Pension Trust Fu	4	401A & 457B Def Comp ROTH 45	999-101000	3,522.98-	
11/04/2025	CDPT	11/07/2025	1010477	IRS - 941 Taxes	1	941 Deposit Federal Withholding T	999-101000	6,550.11-	
11/18/2025	CDPT	11/21/2025	1010478	Colonial Life Processing Center	5	Insurance	999-101000	857.38-	
11/18/2025	CDPT	11/21/2025	1010479	Florida Retirement System	3	Retirement Contributions	999-101000	10,069.14-	
11/18/2025	CDPT	11/21/2025	1010480	IRS - 941 Taxes	1	941 Deposit Federal Withholding T	999-101000	9,440.86-	
11/18/2025	CDPT	11/21/2025	1010481	UHS Premium Billing (Dental)	6	Dental Insurance	999-101000	324.90-	
11/18/2025	CDPT	11/21/2025	1010482	UHS Premium Billing (Vision)	7	Vision Insurance Vision Pay Perio	999-101000	30.52-	
11/18/2025	CDPT	11/21/2025	1010483	Florida Municipal Pension Trust Fu	4	401A & 457B Def Comp ROTH 45	999-101000	3,515.92-	
Grand Totals:								91,556.20-	

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Signature Lines

Dated: _____

Mayor: _____

City Council: _____

City Recorder: _____

Report Criteria:

Includes all check types

Includes unprinted checks

Report Criteria:
Report type: GL detail
Check.Type = {<>} "Adjustment"

GL Period	Check Issue Date	Check Number	Vendor Number	Payee	Invoice Number	Invoice Sequence	Invoice GL Account	Discount Taken	Invoice Amount	Check Amount
ADMINISTRATIVE IMPACT FEE FUND										
11/25	11/19/2025	25594	683	Takkt America Holdings	CW116508-H	1	170-571-605	.00	17,049.33	17,049.33
Total ADMINISTRATIVE IMPACT FEE FUND:										
								.00	17,049.33	
CAPITAL - STORM WATER										
11/25	11/11/2025	25560	255	Woodard & Curran	255575	1	430-533-635	.00	37,581.80	37,581.80
11/25	11/11/2025	25561	255	Woodard & Curran	255620	1	430-533-635	.00	31,880.00	31,880.00
Total CAPITAL - STORM WATER:										
								.00	69,461.80	
CAPITAL - LIBRARY										
11/25	11/11/2025	25533	308	Gatorskitch Architects & Planners	22-010-11	1	500-571-605	.00	2,555.60	2,555.60
Total CAPITAL - LIBRARY:										
								.00	2,555.60	
COMBINED CASH FUND										
11/25	11/12/2025	25563	484	Jennifer Reese	UREFUND-1	1	999-101700	.00	134.95	134.95
11/25	11/12/2025	25564	741	Michelle Holmes	UREFUND-1	1	999-101700	.00	135.81	135.81
11/25	11/12/2025	25565	740	Paige Michael	UREFUND-1	1	999-101700	.00	67.47	67.47
11/25	11/12/2025	25566	416	Pulte Homes	UREFUND-1	1	999-101700	.00	187.55	187.55
11/25	11/12/2025	25566	416	Pulte Homes	UREFUND-1	1	999-101700	.00	147.59	147.59
11/25	11/12/2025	25566	416	Pulte Homes	UREFUND-1	1	999-101700	.00	241.00	241.00
11/25	11/12/2025	25566	416	Pulte Homes	UREFUND-1	1	999-101700	.00	310.04	310.04
11/25	11/12/2025	25566	416	Pulte Homes	UREFUND-1	1	999-101700	.00	336.94	336.94
11/25	11/12/2025	25566	416	Pulte Homes	UREFUND-1	1	999-101700	.00	210.86	210.86
11/25	11/12/2025	25566	416	Pulte Homes	UREFUND-1	2	999-101700	.00	166.93	166.93
11/25	11/12/2025	25566	416	Pulte Homes	UREFUND-1	1	999-101700	.00	390.25	390.25
11/25	11/12/2025	25566	416	Pulte Homes	UREFUND-1	1	999-101700	.00	1,059.00	1,059.00
11/25	11/12/2025	25566	416	Pulte Homes	UREFUND-1	1	999-101700	.00	346.73	346.73
11/25	11/12/2025	25566	416	Pulte Homes	UREFUND-1	2	999-101700	.00	449.71	449.71
11/25	11/12/2025	25566	416	Pulte Homes	UREFUND-1	1	999-101700	.00	147.59	147.59
11/25	11/12/2025	25566	416	Pulte Homes	UREFUND-1	1	999-101700	.00	54.35	54.35
11/25	11/12/2025	25567	739	Roy & Catherine Wington	UREFUND-1	1	999-101700	.00	96.86	96.86
11/25	11/12/2025	25568	742	Southern Development & Constr	UREFUND-1	1	999-101700	.00	7,845.40	7,845.40

M = Manual Check, V = Void Check

GL Period	Check Issue Date	Check Number	Vendor Number	Payee	Invoice Number	Invoice Sequence	Invoice GL Account	Discount Taken	Invoice Amount	Check Amount
11/25	11/12/2025	25569	738	Thomas Sheehan	UREFUND-1	1	999-101700	.00	107.57	107.57
Total COMBINED CASH FUND:										
GENERAL FUND										
11/25	11/04/2025	25508								
11/25	11/04/2025	25508	680	Virginia Holm	803	1	001-513-470	.00	100.00-	100.00- V
11/25	11/03/2025	25515	680	Virginia Holm	803	2	001-574-481	.00	315.00-	315.00- V
11/25	11/03/2025	25515	712	Booksamillion.com	2529001411	1	001-571-660	.00	6.39	6.39
11/25	11/03/2025	25515	712	Booksamillion.com	2529100012	1	001-571-660	.00	5.04	5.04
11/25	11/03/2025	25515	712	Booksamillion.com	2529405698	1	001-571-660	.00	27.20	27.20
11/25	11/03/2025	25515	712	Booksamillion.com	2529500011	1	001-571-660	.00	13.59	13.59
11/25	11/03/2025	25516	75	Parks Consulting Services, LLC	721	1	001-202600	.00	170.00	170.00
11/25	11/03/2025	25516	75	Parks Consulting Services, LLC	721	2	001-519-310	.00	2,410.00	2,410.00
11/25	11/03/2025	25516	75	Parks Consulting Services, LLC	721	3	001-202600	.00	85.00	85.00
11/25	11/03/2025	25516	75	Parks Consulting Services, LLC	723	1	001-202600	.00	740.00	740.00
11/25	11/03/2025	25517	75	Parks Consulting Services, LLC	724	1	001-519-310	.00	2,220.00	2,220.00
11/25	11/04/2025	25518	680	Virginia Holm	803	5	001-571-521	.00	315.00	315.00
11/25	11/11/2025	25518	737	Annia Castro	25-0107	1	001-571-460	.00	1,705.00	1,705.00
11/25	11/11/2025	25518	737	Annia Castro	25-0107	3	001-519-490	.00	144.00	144.00
11/25	11/11/2025	25518	737	Annia Castro	25-0107	4	001-513-460	.00	144.00	144.00
11/25	11/11/2025	25519	737	Annia Castro	25-0107	5	001-571-460	.00	143.00	143.00
11/25	11/11/2025	25519	649	Ark Septic	7553	1	001-539-460	.00	450.00	450.00
11/25	11/11/2025	25520	649	Ark Septic	7617	1	001-520-460	.00	450.00	450.00
11/25	11/11/2025	25520	712	Booksamillion.com	2529602982	1	001-571-660	.00	27.96	27.96
11/25	11/11/2025	25520	712	Booksamillion.com	2529700001	1	001-571-660	.00	6.39	6.39
11/25	11/11/2025	25520	712	Booksamillion.com	2530000140	1	001-571-660	.00	13.56	13.56
11/25	11/11/2025	25520	712	Booksamillion.com	2530100007	1	001-571-660	.00	11.19	11.19
11/25	11/11/2025	25520	712	Booksamillion.com	2530101770	1	001-571-660	.00	20.79	20.79
11/25	11/11/2025	25520	712	Booksamillion.com	2530101780	1	001-571-660	.00	16.79	16.79
11/25	11/11/2025	25520	712	Booksamillion.com	2530201190	1	001-571-660	.00	21.60	21.60
11/25	11/11/2025	25520	712	Booksamillion.com	2530301503	1	001-571-660	.00	12.25	12.25
11/25	11/11/2025	25520	712	Booksamillion.com	2530301521	1	001-571-660	.00	12.24	12.24
11/25	11/11/2025	25520	712	Booksamillion.com	2530301548	1	001-571-660	.00	14.39	14.39
11/25	11/11/2025	25521	700	Caroline Trepanier	10282025	1	001-513-400	.00	25.76	25.76
11/25	11/11/2025	25524	362	Civicplus, LLC	349379	1	001-519-350	.00	248.06	248.06
11/25	11/11/2025	25525	22	Comcast	6423-Oct25	1	001-520-411	.00	321.60	321.60
11/25	11/11/2025	25525	22	Comcast	6431-Oct25	1	001-520-411	.00	321.60	321.60
11/25	11/11/2025	25527	430	Deanco Building Solutions, Inc	151080	1	001-520-460	.00	89.60	89.60
11/25	11/11/2025	25527	430	Deanco Building Solutions, Inc	151080	2	001-513-340	.00	134.40	134.40

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Check Register - Monthly Rec
Check Issue Dates: 11/1/2025 - 11/30/2025

GL Period	Check Issue Date	Check Number	Vendor Number	Payee	Invoice Number	Invoice Sequence	Invoice GL Account	Discount Taken	Invoice Amount	Check Amount
11/25	11/11/2025	25527	430	Deanco Building Solutions, Inc	151080	3	001-572-460	.00	134.40	134.40
11/25	11/11/2025	25527	430	Deanco Building Solutions, Inc	151080	4	001-511-460	.00	89.60	89.60
11/25	11/11/2025	25527	430	Deanco Building Solutions, Inc	152307	1	001-519-490	.00	50.00	50.00
11/25	11/11/2025	25527	430	Deanco Building Solutions, Inc	152307	3	001-571-340	.00	98.00	98.00
11/25	11/11/2025	25528	27	Duke Energy	1140-12/01/2	1	001-541-430	.00	18.33	18.33
11/25	11/11/2025	25528	27	Duke Energy	1398-12/01/2	1	001-572-430	.00	210.73	210.73
11/25	11/11/2025	25528	27	Duke Energy	1588-12/01/2	1	001-541-431	.00	976.76	976.76
11/25	11/11/2025	25528	27	Duke Energy	1858-12/01/2	1	001-572-411	.00	35.68	35.68
11/25	11/11/2025	25528	27	Duke Energy	2018 2-12/01	1	001-513-430	.00	430.90	430.90
11/25	11/11/2025	25528	27	Duke Energy	2513-12/01/2	1	001-520-430	.00	302.53	302.53
11/25	11/11/2025	25528	27	Duke Energy	2872-12/01/2	1	001-541-431	.00	109.65	109.65
11/25	11/11/2025	25528	27	Duke Energy	2894-12/01/2	1	001-541-431	.00	18.91	18.91
11/25	11/11/2025	25528	27	Duke Energy	3126-12/01/2	1	001-541-431	.00	155.39	155.39
11/25	11/11/2025	25528	27	Duke Energy	3340-12/01/2	1	001-571-430	.00	283.50	283.50
11/25	11/11/2025	25528	27	Duke Energy	3564-12/01/2	1	001-513-430	.00	51.24	51.24
11/25	11/11/2025	25528	27	Duke Energy	3803-12/01/2	1	001-541-431	.00	22.74	22.74
11/25	11/11/2025	25528	27	Duke Energy	4036-12/01/2	1	001-541-431	.00	17.48	17.48
11/25	11/11/2025	25528	27	Duke Energy	4250-12/01/2	1	001-539-430	.00	305.13	305.13
11/25	11/11/2025	25528	27	Duke Energy	4458-12/01/2	1	001-541-431	.00	414.54	414.54
11/25	11/11/2025	25528	27	Duke Energy	5092-12/01/2	1	001-541-431	.00	431.59	431.59
11/25	11/11/2025	25528	27	Duke Energy	5268-12/01/2	1	001-571-430	.00	549.81	549.81
11/25	11/11/2025	25528	27	Duke Energy	9355-12/01/2	1	001-572-430	.00	43.65	43.65
11/25	11/11/2025	25529	622	Duncan Mechanical Services	47843234	1	001-513-460	.00	1,261.00	1,261.00
11/25	11/11/2025	25530	29	Embroidery Works - Photograph -	724281	1	001-574-481	.00	2,626.84	2,626.84
11/25	11/11/2025	25531	35	Florida League of Cities	352FLC2526	1	001-511-540	.00	664.00	664.00
11/25	11/11/2025	25532	37	Florida Municipal Insurance Trust	2526-0391-Q	1	001-511-450	.00	2,068.82	2,068.82
11/25	11/11/2025	25532	37	Florida Municipal Insurance Trust	2526-0391-Q	2	001-513-450	.00	4,910.17	4,910.17
11/25	11/11/2025	25532	37	Florida Municipal Insurance Trust	2526-0391-Q	3	001-519-450	.00	1,374.85	1,374.85
11/25	11/11/2025	25532	37	Florida Municipal Insurance Trust	2526-0391-Q	4	001-520-450	.00	502.81	502.81
11/25	11/11/2025	25532	37	Florida Municipal Insurance Trust	2526-0391-Q	5	001-522-450	.00	1,885.37	1,885.37
11/25	11/11/2025	25532	37	Florida Municipal Insurance Trust	2526-0391-Q	6	001-524-450	.00	838.09	838.09
11/25	11/11/2025	25532	37	Florida Municipal Insurance Trust	2526-0391-Q	7	001-539-450	.00	2,042.10	2,042.10
11/25	11/11/2025	25532	37	Florida Municipal Insurance Trust	2526-0391-Q	8	001-541-450	.00	2,435.36	2,435.36
11/25	11/11/2025	25532	37	Florida Municipal Insurance Trust	2526-0391-Q	9	001-574-450	.00	668.80	668.80
11/25	11/11/2025	25532	37	Florida Municipal Insurance Trust	2526-0391-Q	10	001-569-450	.00	680.88	680.88
11/25	11/11/2025	25532	37	Florida Municipal Insurance Trust	2526-0391-Q	11	001-571-450	.00	2,147.25	2,147.25
11/25	11/11/2025	25532	37	Florida Municipal Insurance Trust	2526-0391-Q	12	001-572-450	.00	5,694.70	5,694.70
11/25	11/11/2025	25534	301	Half	10152949	1	001-202600	.00	240.00	240.00
11/25	11/11/2025	25536	599	L & W Supply - Orlando South, FL	1015549224	1	001-511-460	.00	83.13	83.13

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GL Period	Check Issue Date	Check Number	Vendor Number	Payee	Invoice Number	Invoice Sequence	Invoice GL Account	Discount Taken	Invoice Amount	Check Amount
11/25	11/11/2025	25538	145	Lake County Board of County Offi	177865	1	001-202400	.00	20.00	20.00
11/25	11/11/2025	25539	393	Lakeshore Tree Service, LLC	10272025	1	001-539-460	.00	1,200.00	1,200.00
11/25	11/11/2025	25540	222	Laser Engravables	INV-0714	1	001-574-481	.00	563.00	563.00
11/25	11/11/2025	25540	222	Laser Engravables	INV-0714	2	001-574-485	.00	198.00	198.00
11/25	11/11/2025	25540	222	Laser Engravables	INV-0743	1	001-511-510	.00	48.40	48.40
11/25	11/11/2025	25541	64	Law Office of Anita Geraci-Carver,	12658	1	001-514-310	.00	2,375.00	2,375.00
11/25	11/11/2025	25541	64	Law Office of Anita Geraci-Carver,	12659	1	001-524-313	.00	144.00	144.00
11/25	11/11/2025	25541	64	Law Office of Anita Geraci-Carver,	12660	1	001-202600	.00	495.00	495.00
11/25	11/11/2025	25542	314	Observer	10312025	1	001-574-481	.00	1,555.00	1,555.00
11/25	11/11/2025	25543	73	Orlando Sentinel	1264372240	1	001-574-481	.00	789.50	789.50
11/25	11/11/2025	25544	610	Peter James Ellsworth	10272025	1	001-520-343	.00	618.00	618.00
11/25	11/11/2025	25544	610	Peter James Ellsworth	10282025	1	001-520-343	.00	618.45	618.45
11/25	11/11/2025	25544	610	Peter James Ellsworth	11032025	1	001-520-343	.00	477.45	477.45
11/25	11/11/2025	25544	610	Peter James Ellsworth	11052025	1	001-520-343	.00	740.40	740.40
11/25	11/11/2025	25546	562	Rafaeline Rodriguez	871	1	001-511-460	.00	920.00	920.00
11/25	11/11/2025	25546	562	Rafaeline Rodriguez	872	1	001-571-460	.00	1,250.00	1,250.00
11/25	11/11/2025	25547	406	Ricoh USA, Inc	5072267222	1	001-519-490	.00	46.31	46.31
11/25	11/11/2025	25547	406	Ricoh USA, Inc	5072267222	3	001-571-340	.00	46.31	46.31
11/25	11/11/2025	25548	735	Ron Myers	10282025	1	001-520-343	.00	385.35	385.35
11/25	11/11/2025	25548	735	Ron Myers	10312025	1	001-520-343	.00	471.50	471.50
11/25	11/11/2025	25548	735	Ron Myers	11042025	1	001-520-343	.00	232.50	232.50
11/25	11/11/2025	25548	735	Ron Myers	11062025	1	001-520-343	.00	244.20	244.20
11/25	11/11/2025	25549	88	Seco Energy	0010-NOV/25	1	001-541-431	.00	1,125.73	1,125.73
11/25	11/11/2025	25549	88	Seco Energy	2802-NOV/25	1	001-541-431	.00	945.54	945.54
11/25	11/11/2025	25549	88	Seco Energy	5800-NOV/25	1	001-541-431	.00	212.00	212.00
11/25	11/11/2025	25549	88	Seco Energy	9513-NOV/25	1	001-541-431	.00	128.00	128.00
11/25	11/11/2025	25550	112	Summit Broadband	1024546520	1	001-513-411	.00	125.00	125.00
11/25	11/11/2025	25550	112	Summit Broadband	1024546520	2	001-519-411	.00	125.00	125.00
11/25	11/11/2025	25550	112	Summit Broadband	1024546520	3	001-572-411	.00	125.00	125.00
11/25	11/11/2025	25552	228	Terry Powers	175471	1	001-572-340	.00	270.00	270.00
11/25	11/11/2025	25553	200	The Lake Doctors, Inc	2052545	1	001-541-462	.00	105.00	105.00
11/25	11/11/2025	25555	376	Umana Security Services, LLC	10272025	1	001-520-343	.00	609.00	609.00
11/25	11/11/2025	25555	376	Umana Security Services, LLC	10302025	1	001-520-343	.00	609.00	609.00
11/25	11/11/2025	25555	376	Umana Security Services, LLC	11032025	1	001-520-343	.00	234.00	234.00
11/25	11/11/2025	25555	376	Umana Security Services, LLC	11042025	1	001-520-343	.00	309.00	309.00
11/25	11/11/2025	25558	106	Verizon Wireless	6127613272	1	001-513-410	.00	45.02	45.02
11/25	11/11/2025	25558	106	Verizon Wireless	6127613272	2	001-513-410	.00	36.07	36.07
11/25	11/11/2025	25558	106	Verizon Wireless	6127613272	4	001-513-410	.00	37.45	37.45
11/25	11/11/2025	25558	106	Verizon Wireless	6127613272	6	001-519-410	.00	37.45	37.45

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GL Period	Check Issue Date	Check Number	Vendor Number	Payee	Invoice Number	Invoice Sequence	Invoice GL Account	Discount Taken	Invoice Amount	Check Amount
11/25	11/11/2025	25558	106	Verizon Wireless	6127613272	7	001-539-410	.00	37.45	37.45
11/25	11/11/2025	25558	106	Verizon Wireless	6127613272	9	001-520-410	.00	37.45	37.45
11/25	11/11/2025	25559	107	Waste Pro of Florida Inc.	0001518185	1	001-534-340	.00	24,103.20	24,103.20
11/25	11/11/2025	25559	107	Waste Pro of Florida Inc.	0001518187	1	001-534-340	.00	2,296.78	2,296.78
11/25	11/12/2025	25562	730	Yellowstone Landscape - Southea	1032690	1	001-572-345	.00	4,198.95	4,198.95
11/25	11/12/2025	25562	730	Yellowstone Landscape - Southea	1032690	2	001-572-340	.00	1,855.35	1,855.35
11/25	11/12/2025	25562	730	Yellowstone Landscape - Southea	1032690	3	001-541-340	.00	3,710.70	3,710.70
11/25	11/12/2025	25570	743	Central Florida Magazine, LLC	2025-218466	1	001-574-481	.00	999.00	999.00
11/25	11/13/2025	25572	612	Israel Grimaldo	1512	1	001-511-460	.00	5,400.00	5,400.00
11/25	11/13/2025	25572	612	Israel Grimaldo	1512	2	001-513-460	.00	5,050.00	5,050.00
11/25	11/17/2025	25573	712	Booksamillion.com	2529605915	1	001-571-660	.00	26.97	26.97
11/25	11/18/2025	25573	712	Booksamillion.com	2529605915	1	001-571-660	.00	26.97-	26.97- V
11/25	11/18/2025	25573	712	Booksamillion.com	2530800556	1	001-571-660	.00	25.60-	25.60- V
11/25	11/17/2025	25573	712	Booksamillion.com	2530800556	1	001-571-660	.00	25.60	25.60
11/25	11/17/2025	25573	712	Booksamillion.com	2530900003	1	001-571-660	.00	20.80	20.80
11/25	11/18/2025	25573	712	Booksamillion.com	2530900003	1	001-571-660	.00	20.80-	20.80- V
11/25	11/18/2025	25573	712	Booksamillion.com	2530900010	1	001-571-660	.00	13.59-	13.59- V
11/25	11/17/2025	25573	712	Booksamillion.com	2530900010	1	001-571-660	.00	13.59	13.59
11/25	11/17/2025	25573	712	Booksamillion.com	2531000332	1	001-571-660	.00	24.99	24.99
11/25	11/18/2025	25573	712	Booksamillion.com	2531000332	1	001-571-660	.00	24.99-	24.99- V
11/25	11/18/2025	25573	712	Booksamillion.com	2531000341	1	001-571-660	.00	49.60-	49.60- V
11/25	11/17/2025	25573	712	Booksamillion.com	2531000341	1	001-571-660	.00	49.60	49.60
11/25	11/17/2025	25573	712	Booksamillion.com	2531003708	1	001-571-660	.00	9.04	9.04
11/25	11/18/2025	25573	712	Booksamillion.com	2531350261	1	001-571-660	.00	9.04-	9.04- V
11/25	11/18/2025	25573	712	Booksamillion.com	2531350261	1	001-571-660	.00	27.20	27.20 V
11/25	11/17/2025	25573	712	Booksamillion.com	2531502611	1	001-571-660	.00	27.20-	27.20-
11/25	11/18/2025	25573	712	Booksamillion.com	2531502611	1	001-571-660	.00	23.20	23.20
11/25	11/18/2025	25573	712	Booksamillion.com	2531502613	1	001-571-660	.00	23.20-	23.20- V
11/25	11/17/2025	25573	712	Booksamillion.com	2531502613	1	001-571-660	.00	23.20	23.20 V
11/25	11/18/2025	25574	712	Booksamillion.com	2529605915	3	001-571-660	.00	23.20-	23.20-
11/25	11/18/2025	25574	712	Booksamillion.com	2530800556	3	001-571-660	.00	26.97	26.97
11/25	11/18/2025	25574	712	Booksamillion.com	2530900003	3	001-571-660	.00	25.60	25.60
11/25	11/18/2025	25574	712	Booksamillion.com	2530900003	3	001-571-660	.00	20.80	20.80
11/25	11/18/2025	25574	712	Booksamillion.com	2530900010	3	001-571-660	.00	13.59	13.59
11/25	11/18/2025	25574	712	Booksamillion.com	2531000332	3	001-571-660	.00	24.00	24.00
11/25	11/18/2025	25574	712	Booksamillion.com	2531000341	3	001-571-660	.00	49.60	49.60
11/25	11/18/2025	25574	712	Booksamillion.com	2531003708	3	001-571-660	.00	9.04	9.04
11/25	11/18/2025	25574	712	Booksamillion.com	2531502611	3	001-571-660	.00	23.20-	23.20-
11/25	11/18/2025	25574	712	Booksamillion.com	2531502612	1	001-571-660	.00	27.20-	27.20-

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GL Period	Check Issue Date	Check Number	Vendor Number	Payee	Invoice Number	Invoice Sequence	Invoice GL Account	Discount Taken	Invoice Amount	Check Amount
11/25	11/18/2025	25574	712	Booksamillion.com	2531502613	3	001-571-660	.00	23.20-	23.20-
11/25	11/19/2025	25577	317	Aetna - Silverscript	6234-DEC25	1	001-571-230	.00	48.30	48.30
11/25	11/19/2025	25578	8	Bank of America	2709-Nov25	2	001-519-510	.00	39.99	39.99
11/25	11/19/2025	25578	8	Bank of America	2709-Nov25	3	001-513-510	.00	77.96	77.96
11/25	11/19/2025	25578	8	Bank of America	2709-Nov25	4	001-519-510	.00	86.24	86.24
11/25	11/19/2025	25578	8	Bank of America	2709-Nov25	5	001-511-490	.00	132.53	132.53
11/25	11/19/2025	25578	8	Bank of America	2709-Nov25	6	001-574-481	.00	980.14	980.14
11/25	11/19/2025	25578	8	Bank of America	2709-Nov25	7	001-513-550	.00	1,220.00	1,220.00
11/25	11/19/2025	25578	8	Bank of America	2709-Nov25	9	001-574-481	.00	450.00	450.00
11/25	11/19/2025	25578	8	Bank of America	6477-Nov25	1	001-571-420	.00	7.47	7.47
11/25	11/19/2025	25578	8	Bank of America	9514-Nov25	2	001-541-460	.00	23.51	23.51
11/25	11/19/2025	25578	8	Bank of America	9514-Nov25	3	001-574-481	.00	330.10	330.10
11/25	11/19/2025	25579	745	Carrie McDole	INV-13032	1	001-513-440	.00	750.00	750.00
11/25	11/19/2025	25580	744	Caselle LLC	INV-13032	1	001-513-340	.00	1,747.31	1,747.31
11/25	11/19/2025	25580	744	Caselle LLC	INV-13032	2	001-519-340	.00	1,747.31	1,747.31
11/25	11/19/2025	25580	744	Caselle LLC	INV-13032	3	001-541-340	.00	1,747.31	1,747.31
11/25	11/19/2025	25580	744	Caselle LLC	INV-13032	4	001-571-340	.00	1,747.31	1,747.31
11/25	11/19/2025	25580	744	Caselle LLC	INV-13032	5	001-572-340	.00	1,747.31	1,747.31
11/25	11/19/2025	25581	441	Claudia Wynkoop	11192025	1	001-574-481	.00	199.41	199.41
11/25	11/19/2025	25581	441	Claudia Wynkoop	11192025	2	001-571-510	.00	39.70	39.70
11/25	11/19/2025	25581	441	Claudia Wynkoop	11192025	3	001-569-490	.00	25.99	25.99
11/25	11/19/2025	25583	546	Duke Energy	F592253490	1	001-541-630	.00	3,223.20	3,223.20
11/25	11/19/2025	25584	126	Florida Blue	7876-DEC25	1	001-571-230	.00	220.50	220.50
11/25	11/19/2025	25585	152	I - Tech Support Inc.	0063018	1	001-513-340	.00	370.43	370.43
11/25	11/19/2025	25585	152	I - Tech Support Inc.	0063018	2	001-519-340	.00	370.43	370.43
11/25	11/19/2025	25585	152	I - Tech Support Inc.	0063018	3	001-539-340	.00	370.43	370.43
11/25	11/19/2025	25585	152	I - Tech Support Inc.	0063018	4	001-571-340	.00	370.43	370.43
11/25	11/19/2025	25586	58	Lake County BOCC	OCT2025	1	001-208600	.00	9,791.60	9,791.60
11/25	11/19/2025	25586	58	Lake County BOCC	OCT2025	2	001-208500	.00	2,905.00	2,905.00
11/25	11/19/2025	25586	58	Lake County BOCC	OCT2025	3	001-208300	.00	73,318.00	73,318.00
11/25	11/19/2025	25586	58	Lake County BOCC	OCT2025	4	001-208200	.00	7,612.00	7,612.00
11/25	11/19/2025	25586	58	Lake County BOCC	OCT2025	5	001-208200	.00	21,855.00	21,855.00
11/25	11/19/2025	25586	58	Lake County BOCC	OCT2025	6	001-208200	.00	1,673.00	1,673.00
11/25	11/19/2025	25586	58	Lake County BOCC	OCT2025	7	001-208600	.00	.80	.80
11/25	11/19/2025	25587	540	Mai Yang	11182025	1	001-513-550	.00	291.99	291.99
11/25	11/19/2025	25588	629	Michael Lemmie	10821	1	001-574-481	.00	125.00	125.00
11/25	11/19/2025	25589	711	Nicholas Christopher	11172025	1	001-520-343	.00	363.15	363.15
11/25	11/19/2025	25590	610	Peter James Ellsworth	11122025	1	001-520-343	.00	440.75	440.75
11/25	11/19/2025	25591	735	Ron Myers	11082025	1	001-520-343	.00	464.85	464.85

M = Manual Check, V = Void Check

Check Register - Monthly Rec
Check Issue Dates: 11/1/2025 - 11/30/2025

Town of Montverde

GL Period	Check Issue Date	Check Number	Vendor Number	Payee	Invoice Number	Invoice Sequence	Invoice GL Account	Discount Taken	Invoice Amount	Check Amount
11/25	11/19/2025	25591	735	Ron Myers	11132025	1	001-520-343	.00	356.10	356.10
11/25	11/19/2025	25592	453	Sandra Johnson	11132025	1	001-574-481	.00	42.42	42.42
11/25	11/19/2025	25593	386	Table Top Catering	E09546	2	001-511-481	.00	282.61	282.61
11/25	11/19/2025	25595	228	Terry Powers	M2302	1	001-572-340	.00	270.00	270.00
11/25	11/19/2025	25596	95	The Home Depot Credit Services	1024612	1	001-574-481	.00	97.45	97.45
11/25	11/19/2025	25596	95	The Home Depot Credit Services	3621001	1	001-574-481	.00	102.85	102.85
11/25	11/19/2025	25596	95	The Home Depot Credit Services	4032226	1	001-574-481	.00	312.59	312.59
11/25	11/19/2025	25596	95	The Home Depot Credit Services	5031740	1	001-522-460	.00	28.32	28.32
11/25	11/19/2025	25596	95	The Home Depot Credit Services	5616478	1	001-574-481	.00	176.22	176.22
11/25	11/19/2025	25596	95	The Home Depot Credit Services	5626639	1	001-574-481	.00	56.08	56.08
11/25	11/19/2025	25596	95	The Home Depot Credit Services	6032118	1	001-574-481	.00	610.79	610.79
11/25	11/19/2025	25596	95	The Home Depot Credit Services	7033061	1	001-574-481	.00	431.43	431.43
11/25	11/19/2025	25597	376	Umana Security Services, LLC	11122025	1	001-520-343	.00	234.00	234.00
11/25	11/19/2025	25597	376	Umana Security Services, LLC	11132025	1	001-520-343	.00	234.00	234.00
11/25	11/19/2025	25599	125	Vital Catalyst, LLC	INV-2682	1	001-513-340	.00	100.00	100.00
11/25	11/19/2025	25600	110	Wex Bank	108662568	1	001-520-524	.00	37.19	37.19
11/25	11/19/2025	25600	110	Wex Bank	108662568	2	001-539-524	.00	266.12	266.12
11/25	11/19/2025	25600	110	Wex Bank	108662568	4	001-572-524	.00	104.38	104.38
Total GENERAL FUND:									.00	251,744.64
PARKS & REC IMPACT FEE FUND										
11/25	11/18/2025	25575	182	Suncoast Insulators & Specialties	QA08662	1	140-572-631	.00	12,124.00	12,124.00
Total PARKS & REC IMPACT FEE FUND:									.00	12,124.00
SEWER-ENTERPRISE (WASTE WATER)										
11/25	11/11/2025	25523	396	City of Clermont-Utility Dept	2759780	1	421-535-576	.00	2,461.88	2,461.88
11/25	11/11/2025	25523	396	City of Clermont-Utility Dept	2760860	1	421-535-576	.00	471.71	471.71
11/25	11/11/2025	25528	27	Duke Energy	8420-12/01/2	1	421-535-430	.00	63.26	63.26
11/25	11/11/2025	25537	57	Lake Apopka Natural Gas District	3337-OCT25	1	421-535-430	.00	70.40	70.40
11/25	11/19/2025	25580	744	Caselle LLC	INV-13032	6	421-535-340	.00	1,747.31	1,747.31
Total SEWER-ENTERPRISE (WASTE WATER):									.00	4,814.56
WATER										
11/25	11/11/2025	25518	737	Annia Castro	25-0107	2	400-533-460	.00	144.00	144.00
11/25	11/11/2025	25522	81	Central Florida Water Testing LLC	INV-2503381	1	400-533-340	.00	277.00	277.00
11/25	11/11/2025	25522	81	Central Florida Water Testing LLC	INV-2503391	1	400-533-340	.00	847.00	847.00

M = Manual Check, V = Void Check

GL Period	Check Issue Date	Check Number	Vendor Number	Payee	Invoice Number	Invoice Sequence	Invoice GL Account	Discount Taken	Invoice Amount	Check Amount
11/25	11/11/2025	25525	22	Comcast	3222-Oct25	1	400-533-411	.00	316.60	316.60
11/25	11/11/2025	25525	22	Comcast	3446-Oct25	1	400-533-411	.00	314.85	314.85
11/25	11/11/2025	25526	24	Dave Symonds & Associates	35733	1	400-533-520	.00	864.18	864.18
11/25	11/11/2025	25527	430	Deanco Building Solutions, Inc	152307	2	400-533-340	.00	50.00	50.00
11/25	11/11/2025	25528	27	Duke Energy	1794-12/01/2	1	400-533-430	.00	2,512.95	2,512.95
11/25	11/11/2025	25528	27	Duke Energy	2018-12/01/2	1	400-533-430	.00	430.91	430.91
11/25	11/11/2025	25528	27	Duke Energy	2282-12/01/2	1	400-533-430	.00	391.25	391.25
11/25	11/11/2025	25528	27	Duke Energy	2711-12/01/2	1	400-533-430	.00	211.97	211.97
11/25	11/11/2025	25528	27	Duke Energy	3461-12/01/2	1	400-533-430	.00	186.70	186.70
11/25	11/11/2025	25528	27	Duke Energy	4656-12/01/2	1	400-533-430	.00	196.98	196.98
11/25	11/11/2025	25528	27	Duke Energy	4870-12/01/2	1	400-533-430	.00	223.79	223.79
11/25	11/11/2025	25528	27	Duke Energy	5223-12/01/2	1	400-533-430	.00	26.93	26.93
11/25	11/11/2025	25528	27	Duke Energy	6868-12/01/2	1	400-533-430	.00	60.49	60.49
11/25	11/11/2025	25528	27	Duke Energy	9320-12/01/2	1	400-533-430	.00	776.77	776.77
11/25	11/11/2025	25528	27	Duke Energy	9445-12/01/2	1	400-533-430	.00	78.69	78.69
11/25	11/11/2025	25532	37	Florida Municipal Insurance Trust	2526-0391-Q	13	400-533-450	.00	15,188.80	15,188.80
11/25	11/11/2025	25535	206	Hawkins, Inc	7251369	1	400-533-520	.00	162.42	162.42
11/25	11/11/2025	25535	206	Hawkins, Inc	7251369	2	400-533-520	.00	26.50	26.50
11/25	11/11/2025	25537	57	Lake Apopka Natural Gas District	4959-OCT25	1	400-533-430	.00	29.68	29.68
11/25	11/11/2025	25545	80	Pitney Bowes Global Financial	3107483899	1	400-533-440	.00	174.36	174.36
11/25	11/11/2025	25547	406	Ricoh USA, Inc	5072267222	2	400-533-340	.00	46.31	46.31
11/25	11/11/2025	25550	112	Summit Broadband	1024546520	4	400-533-411	.00	125.00	125.00
11/25	11/11/2025	25551	90	Sunshine State One Call, Inc.	PS-INV1054	1	400-533-340	.00	128.43	128.43
11/25	11/11/2025	25554	352	Town of Oakland	4776-OCT25	1	400-533-577	.00	1,868.82	1,868.82
11/25	11/11/2025	25556	105	Utility Service Co, Inc	637172	1	400-533-340	.00	3,096.48	3,096.48
11/25	11/11/2025	25557	119	Valli Information Systems, Inc	103084	1	400-533-340	.00	1,878.53	1,878.53
11/25	11/11/2025	25558	106	Verizon Wireless	6127613272	3	400-533-410	.00	36.07	36.07
11/25	11/11/2025	25558	106	Verizon Wireless	6127613272	5	400-533-410	.00	37.45	37.45
11/25	11/11/2025	25558	106	Verizon Wireless	6127613272	8	400-533-410	.00	37.45	37.45
11/25	11/13/2025	25571	266	FDOT	N6980893	1	400-533-490	.00	7.10	7.10
11/25	11/13/2025	25572	612	Israel Grimaldo	1512	3	400-533-460	.00	3,850.00	3,850.00
11/25	11/19/2025	25578	8	Bank of America	2709-Nov25	1	400-533-520	.00	1,249.99	1,249.99
11/25	11/19/2025	25578	8	Bank of America	2709-Nov25	8	400-533-410	.00	41.10	41.10
11/25	11/19/2025	25578	8	Bank of America	9514-Nov25	1	400-533-465	.00	135.54	135.54
11/25	11/19/2025	25582	660	Core & Main LP	X828515	1	400-533-460	.00	1,259.00	1,259.00
11/25	11/19/2025	25585	152	I - Tech Support Inc.	0063018	5	400-533-340	.00	370.44	370.44
11/25	11/19/2025	25598	104	Utility Repair Experts	2012	1	400-533-460	.00	4,699.00	4,699.00
11/25	11/19/2025	25600	110	Wex Bank	108662568	3	400-533-524	.00	235.85	235.85

M = Manual Check, V = Void Check

GL Period	Check Issue Date	Check Number	Vendor Number	Payee	Invoice Number	Invoice Sequence	Invoice GL Account	Discount Taken	Invoice Amount	Check Amount
Total WATER:										
								.00		42,595.38
Grand Totals:										
								.00		412,781.91

Summary by General Ledger Account Number

GL Account	Debit	Credit	Proof
001-202000	732.79	252,477.43-	251,744.64-
001-202400	20.00	.00	20.00
001-202600	1,730.00	.00	1,730.00
001-208200	31,140.00	.00	31,140.00
001-208300	73,318.00	.00	73,318.00
001-208500	2,905.00	.00	2,905.00
001-208600	9,792.40	.00	9,792.40
001-511-450	2,068.82	.00	2,068.82
001-511-460	6,492.73	.00	6,492.73
001-511-490	132.53	.00	132.53
001-511-491	282.61	.00	282.61
001-511-510	48.40	.00	48.40
001-511-540	664.00	.00	664.00
001-513-340	2,352.14	.00	2,352.14
001-513-400	25.76	.00	25.76
001-513-410	118.54	.00	118.54
001-513-411	125.00	.00	125.00
001-513-430	482.14	.00	482.14
001-513-440	750.00	.00	750.00
001-513-450	4,910.17	.00	4,910.17
001-513-460	6,455.00	.00	6,455.00
001-513-470	.00	100.00-	100.00-
001-513-510	77.96	.00	77.96
001-513-550	1,511.99	.00	1,511.99
001-514-310	2,375.00	.00	2,375.00
001-519-310	4,630.00	.00	4,630.00
001-519-340	2,117.74	.00	2,117.74
001-519-350	248.06	.00	248.06

M = Manual Check, V = Void Check

GL Account	Debit	Credit	Proof
001-519-410	37.45	.00	37.45
001-519-411	125.00	.00	125.00
001-519-450	1,374.85	.00	1,374.85
001-519-490	240.31	.00	240.31
001-519-510	126.23	.00	126.23
001-520-343	7,641.70	.00	7,641.70
001-520-410	37.45	.00	37.45
001-520-411	643.20	.00	643.20
001-520-430	302.53	.00	302.53
001-520-450	502.81	.00	502.81
001-520-460	539.60	.00	539.60
001-520-524	37.19	.00	37.19
001-522-450	1,885.37	.00	1,885.37
001-522-460	28.32	.00	28.32
001-524-313	144.00	.00	144.00
001-524-450	838.09	.00	838.09
001-534-340	26,399.98	.00	26,399.98
001-539-340	370.43	.00	370.43
001-539-410	37.45	.00	37.45
001-539-430	305.13	.00	305.13
001-539-450	2,042.10	.00	2,042.10
001-539-460	1,650.00	.00	1,650.00
001-539-524	266.12	.00	266.12
001-541-340	5,458.01	.00	5,458.01
001-541-430	18.33	.00	18.33
001-541-431	4,558.33	.00	4,558.33
001-541-450	2,435.36	.00	2,435.36
001-541-460	23.51	.00	23.51
001-541-462	105.00	.00	105.00
001-541-630	3,223.20	.00	3,223.20
001-569-450	680.88	.00	680.88
001-569-490	25.99	.00	25.99
001-571-230	268.80	.00	268.80
001-571-340	2,262.05	.00	2,262.05
001-571-420	7.47	.00	7.47
001-571-430	833.31	.00	833.31
001-571-450	2,147.25	.00	2,147.25
001-571-460	3,098.00	.00	3,098.00
001-571-510	39.70	.00	39.70
001-571-521	315.00	.00	315.00

M = Manual Check, V = Void Check

GL Account	Debit	Credit	Proof
001-571-660	623.17	317.79-	305.38
001-572-340	4,142.66	.00	4,142.66
001-572-345	4,198.95	.00	4,198.95
001-572-411	160.68	.00	160.68
001-572-430	254.38	.00	254.38
001-572-450	5,694.70	.00	5,694.70
001-572-460	134.40	.00	134.40
001-572-524	104.38	.00	104.38
001-574-450	668.80	.00	668.80
001-574-481	10,447.82	315.00-	10,132.82
001-574-485	198.00	.00	198.00
140-202000	.00	12,124.00-	12,124.00-
140-572-631	12,124.00	.00	12,124.00
170-202000	.00	17,049.33-	17,049.33-
170-571-605	17,049.33	.00	17,049.33
400-202000	.00	42,595.38-	42,595.38-
400-533-340	6,694.19	.00	6,694.19
400-533-410	152.07	.00	152.07
400-533-411	756.45	.00	756.45
400-533-430	5,127.11	.00	5,127.11
400-533-440	174.36	.00	174.36
400-533-450	15,188.80	.00	15,188.80
400-533-460	9,952.00	.00	9,952.00
400-533-465	135.54	.00	135.54
400-533-490	7.10	.00	7.10
400-533-520	2,303.09	.00	2,303.09
400-533-524	235.85	.00	235.85
400-533-577	1,868.82	.00	1,868.82
421-202000	.00	4,814.56-	4,814.56-
421-535-340	1,747.31	.00	1,747.31
421-535-430	133.66	.00	133.66
421-535-576	2,933.59	.00	2,933.59
430-202000	.00	69,461.80-	69,461.80-
430-533-635	69,461.80	.00	69,461.80
500-202000	.00	2,555.60-	2,555.60-
500-571-605	2,555.60	.00	2,555.60
999-101700	12,436.60	.00	12,436.60
999-202000	.00	12,436.60-	12,436.60-

M = Manual Check, V = Void Check

GL Account	Debit	Credit	Proof
Grand Totals:	414,247.49	414,247.49-	.00

Dated:

Mayor:

City Council:

City Recorder:

Report Criteria:

Report type: GL detail

Check Type = {<-} "Adjustment"

M = Manual Check, V = Void Check

CONSENT AGENDA

**MONTVERDE TOWN COUNCIL
REGULAR MEETING
MINUTES
November 11, 2025, AT 7:00 PM**

TOWN COUNCIL MEMBERS PRESENT

Joe Wynkoop, Mayor
Carol Womack, Vice Mayor
Joe Morganelli, Councilmember
Grant Roberts, Councilmember-Elect
Bryan Rubio, Councilmember-Elect

STAFF PRESENT

Paul Larino, Town Manager
Anita Geraci-Carver, Town Attorney
Sean Parks, Town Planner
Caroline Trepanier, Town Clerk

CALL TO ORDER AND OPENING CEREMONIES

- **Pledge of Allegiance**
- **Invocation**
- **Roll Call**

PRESENTATION, ADMINISTRATIVE MATTERS AND DISCUSSION

Mayor Oath of Office

Town Attorney Geraci-Carver administered the Oath of Office to Mayor Wynkoop.

Councilmembers Oath of Office (Contingent upon Certification by Lake County Supervisor of Election)

Town Attorney Geraci-Carver administered the Oath of Office to Grant Roberts and Bryan Rubio.

Selection of Dais Seats

Council Seat Selection

Womack – 1 Morganelli – 2 Roberts – 3 Rubio – 4

Selection of Vice Mayor

Councilmember Roberts made a motion to nominate Carol Womack as Vice Mayor. Vice Mayor Womack seconded the motion. Motion approved, Vote 3-2.

Congressional Record Recognizing the 100th Anniversary of the Town of Montverde by Congressman Daniel Webster

Town Attorney Geraci-Carver read the Congressional Record from the House of Representatives, Recognizing the 100th Anniversary of the Town of Montverde, Florida.

There was a brief discussion.

CITIZENS QUESTION/COMMENT PERIOD

The Town Council invites the public to come forward with questions, comments, and concerns. The Council will not act at this meeting, but Staff may answer questions, or issues may be referred for appropriate staff action. If further action is necessary, the item may be placed on a future agenda for further review and consideration.

NOTE: Public Comment will not be taken under Citizens Questions/Comment Period for matters listed on this agenda. Public Comments on such items will be taken once the agenda item is before the Council for consideration.

Mayor Wynkoop opened the public discussion.

Zachary Zumwalt, 17557 County Road 455, Montverde, FL spoke of the library and said that he would like it to be opened for additional days.

Jim Peacock, 16549 Lowry Road, Montverde, FL explained that he holds a seat on the Lake County Parks & Recreation Board and shared information regarding a recent meeting agenda item. He explained that cameras can be provided and added to the park areas and that residents can download the app to monitor the fields as well as check the weather and he provided additional information.

There was a brief discussion.

Bob Tomlinson, 16634 Magnolia Terrace, Montverde, FL spoke of the need for additional income to offset the reduction or elimination of property taxes and shared his views on this topic. He also spoke of the two (2) new subdivisions and the need for a downtown facelift. He asked about the benefits of PUDS and made suggestions regarding improvements to the downtown area.

Kelly Moore, 17029 Florence View Dr., Montverde, FL, shared concerns regarding safety at the new intersection at Blackstill Lake Road and shared his views regarding the use of golf carts, the newly added speed signs and the traffic.

Karin Arellano, 17531 County Road 455, Montverde, FL shared her experience with Montverde Day and shared her concerns, she also explained that she feels the town should do more to support the local businesses.

Matthew Baumann, 1122 Imperial Street, Groveland, FL, discussed improving the downtown area, and brought up the CRA, he provided information on the CRA improvements in Groveland and stated that he is on the CRA Board and provided additional details.

Mike Stone, Jr. 16947 Lakeside Dr., Montverde, FL, shared concerns regarding Montverde Day, stated that he applied to be a vendor, and spoke of the process and that he did not qualify and was directed to being a sponsor, mentioned the response received. He also shared documents with the Town Council regarding the Lakeside Drive project and explained that there was flooding in his parking lot and provided additional information. He also spoke of small business loans and asked about grants to improve the downtown area. He also shared his views on golf carts.

Randy Ellman, 16603 Lowry Road, Montverde, FL, thanked Town Manager Larino for Montverde Day. He welcomed the new council members and asked that they follow the charter and spoke briefly of the charter change.

Kelly Moore, 17029 Florence View Dr., Montverde, FL spoke of the charter change and Osgood and asked about Bella Collina.

Mayor Wynkoop advised residents to come to the Planning & Zoning meeting tomorrow regarding Bella Collina.

There was further discussion regarding the charter.

Farmer Banks Helfrich, South Lake County, shared farming tips, congratulated the new council members and thanked our veterans, he asked about constitutional rights and spoke about voting rights and further shared his views.

Aaron Wadsworth 17647 Ninth Street, Montverde, FL, shared documents with the Council, proposed an amendment to article two of the town charter addressing council terms and term limits, changing it to four-year terms instead of two-year terms and a limit of five (5) terms. The transition schedule would begin in 2027, and he further shared his views on the benefits. He also requested that this be added to the November 2026 Ballot.

Councilmember Morganelli stated that he likes the idea and would also like to have seat numbers and that twenty (20) years should be the limit to be on council.

There was a brief discussion.

Vice Mayor Womack asked if he felt this would bring more candidates.

Aaron Wadsworth explained his views.

Town Manager Larino said that he will put this discussion on a future workshop.

Aaron Wadsworth thanked the town for putting on Montverde Days, stated that he enjoyed it and spoke of volunteering and doing more next year.

There was a brief discussion regarding a future workshop.

Kiera Pergram, 16443 Magnolia Bluff Drive, Montverde, FL congratulated the Councilmembers. She also spoke of the Montverde Day event and mentioned her daughter being a vendor in the past and

that an invite was not received this year, she also spoke of supporting local businesses as well as hosting more events focused on local businesses and bringing people together.

Mike Stone, Jr., stated that he would like to see additional advertisements for Montverde Day and shared his views on running for specific council seats.

Allan Hartle, 16191 Hillside Circle, Montverde, FL, thanked the staff for doing a great job with Montverde Day, spoke of Veteran's Day, and mentioned a resident who is a veteran and that adding asphalt to certain sections of town would benefit residents that utilize a wheelchair. He mentioned the need for designated smoking areas during the Montverde Day event and shared his thoughts on a sewer treatment plant as well as the downtown area improvements.

Diane Inklebarger, 16506 Highland Avenue, Montverde, FL, said that she has lived in Montverde for thirty-six (36) years and that she does not want sidewalks, a downtown area or golf carts and further elaborated. She also said that she would like a nativity scene added at the Christmas celebration.

Kelly Moore shared his views on the sewer treatment plant.

Mayor Wynkoop closed the public discussion.

Town Manager Larino's report

Town Manager Larino said that we will do a workshop to discuss these topics and thanked the staff and all volunteers for helping with Montverde Day. He mentioned the bid received for the storm and street project on Porter & First Street, and that contractor credentials are currently being reviewed. He mentioned that a mini grant for irrigation controllers had been received and that some type of program will be set up in the spring to get those installed, provided an update on the lakeside project and that Mr. Stone has made them aware of the problem and that the engineers are looking into it and they are going to see if there is something that needs to be corrected once they get the as-builts as it sounds like there does need to be. He reminded all that the "Light Up Montverde Day" event will be held on December 6 and spoke of direction from the Council to reach out to Lake County and ask about golf carts and that he had a meeting with Lake County will meet with public works. Franklin Pond will take more time due to the recent storm and flooding. He briefly went over the Grant Tracking Sheet & the Highway Patrol Activity 2024-2025 Report.

There was a brief discussion on the Highway Patrol Activity Report.

Town Manager Larino briefly mentioned the Lake County Fire and Rescue Report and the Impact Fee Summary Report, he also provided an update on the Capital Projects.

Town Manager Larino's Capital Project Update

1. Library
2. Library Emergency Generator
3. Outdoor Park Bathroom
4. Small Water Storage Tank and Pump House
5. Community Building
6. Fire Station – County

7. Kirk Park Playground
8. Ridgewood Ave – ADA Ramps and Sidewalk Connections
9. Lakeside Ave Storm/Street Project
10. Porter and 1st Storm/Street Project
11. Boat Ramp and Storm Project
12. Truskett Park – Dock, Storm, FEMA Recovery
13. 455 Storm Street, Sidewalk Project
14. 8th, 9th, Temple Street, Sidewalk, and Storm
15. Well # 1 Generator Replacement
16. Elevated Water Storage Tank
17. Redundant Upper Floridan Well
18. New Lower Floridan Well
19. Consumptive Use Permit
20. Water line Upsizing, Loops, and Hydrants
21. Butterfly Garden - Completed
22. Sports Court – Completed
23. Kirk Park Stage – Completed
24. Baseball Field Conversion – Completed
25. Public Works Storage – Completed
26. Park Lighting – Completed

Councilmember Morganelli asked for an update regarding a previously mentioned grant that could help with the Community Building.

Town Manager Larino stated that he did review it and that this could be a topic to revisit with council at a future workshop, and that it could be a possibility.

Councilmember Morganelli briefly explained the two (2) grants to the Council.

Town Attorney Geraci-Carver Report

Town Attorney Geraci-Carver stated that she did not have anything to report.

Town Planner Parks Report

Town Planner Parks briefly mentioned that they had a typical number of permits and zoning clearance requests and also shared that Wednesdays at the town are going well, they are happy to serve. There is another round of code changes in the new year, and these will be presented to the Planning and Zoning Board and then be presented to the Council. He congratulated the Council Members and the Mayor, and thanked the veterans for their service, he also thanked Mr. Allan Hartle for his service.

Lake County Commission Report

No report.

Town Council Reports

Vice Mayor Womack said that she wanted to echo the sentiments for Montverde Day, she is sorry that there were incidents that occurred with sponsorships, and that she feels the event itself was well-planned and went well. She also mentioned the success of the raffle prizes. She shared her concerns regarding a house on Four Lakes and Alpha or Omega, and the state of the open pool enclosure and would like to see what course of action can be taken. She also shared her thoughts on how to help the downtown area; perhaps having a cleanup day downtown or something similar, she would like to help the downtown area and asked for an update on the Franklin Pond cleanup.

Town Planner Parks stated that he and Town Manager Larino have been discussing this and that the County is currently behind however, he will push them to come out.

Councilmember Morganelli thanked all the veterans for their sacrifice. He congratulated the new council members. He thanked the Montverde Day sponsors, the volunteers and the staff. He also stated that he will always follow the charter. He also spoke of his concerns for Mike Stone, Jr. and the water issue.

Councilmember Roberts asked about the code changes, the pools and the shed setbacks and asked Town Attorney Geraci-Carver for an update on the prepositions regarding the property taxes.

Mayor Wynkoop briefly explained the proposed property tax cuts.

Town Attorney Geraci-Carver provided a summary; the first proposal is complete elimination of the non-school taxes and further explained. She then provided more information; another proposal is a phase out of property taxes over a 10-year period, then there were proposed new exemptions, exempt Florida residents over the age of 65 from paying non-school homestead property taxes, another is a new exemption that would be creating a new homestead exemption equal to 25% of a home's assessed value, another proposal would establish a property insurance relief homestead exemption by granting an additional \$100,000 non-school exemption to homeowners who maintain property insurance on their homestead, there is also a proposal for expanded benefits which would eliminate the cap on Save Our Homes portability benefits and it would allow homeowner's to transfer their accumulated Save Our Homes differential to a new residence even when the replacement home is of lesser value. She also mentioned that there are a couple proposals under valuation assessments and further explained.

There was a brief discussion.

Councilmember Rubio wanted to share that our veterans are important and that our nation is free because of veterans, past and present. He would like to bring back the veteran parking spots and shared his thoughts on the library hours, the term limits, and that he is happy to serve the residents.

Town Manager Larino stated that he recently added handicap parking signs and that he believes the last order contains the new veteran parking signs that are to be installed.

Mayor Wynkoop Report

Mayor Wynkoop said that he counted fifty (50) people and thanked the residents for coming. He also thanked the 82.8% of the residents that came out to vote, asked about the Ferndale septic company.

Town Attorney Geraci-Carver said that when an update was last requested, the County was awaiting comments back from the applicant and that she would follow up for the next meeting. She will let the council know if there is a meeting so they may attend should they wish.

Mayor Wynkoop provided a brief explanation regarding Ferndale.

OCTOBER FINANCE REPORT

Beginning Bank Balance	\$ 3,942,708.97
Revenues	\$ 936,112.87
Expenditures	\$ 50,399.28
Ending Balance	\$ 4,828,422.56
Pending Liabilities	\$ 426,639.56
Available Cash	\$ 4,401,783.00
Total Bank Balance	\$ 4,401,783.00

CONSENT AGENDA

A. Minutes of the Town Council Special Meeting held August 19, 2025.

B. Minutes of the Town Council Special Meeting held August 26, 2025.

Vice Mayor Womack made a motion to approve the minutes of the Town Council Special Meeting held August 19, 2025, and the minutes of the Town Council Special Meeting held August 26, 2025. Councilmember Roberts seconded the motion. Meeting minutes approved 5-0.

DISCUSSION AND ACTION ITEM

Presentation by McDirmit Davis on Final Audit.

Tammy Campbell with McDirmit Davis introduced herself and went over the audit reports slides in the PowerPoint presentation.

Councilmember Morganelli asked for clarification on page 9.

Tammy Campbell explained.

Compliance Audit by the Department of Management Services, Division of Retirement.

Town Manager Larino provided an explanation of the compliance audit and the reporting error and that it has been corrected and in full compliance.

There was a brief discussion.

Mayor Wynkoop made a motion to accept the Final Audit by McDirmit Davis, Councilmember Rubio seconded the motion. McDirmit Davis Final Audit accepted 5-0.

Mayor Wynkoop made a motion to accept the Audit by the Department of Management Services, Division of Retirement, Councilmember Roberts seconded the motion. The Department of Management Services, Division of Retirement Audit accepted 5-0.

Florida Department of Environmental Protection's Audit of the Town's Municipal Separate Storm Sewer System (MS4)

Town Manager Larino provided a brief explanation of the Florida Department of Environmental Protection audit.

Mayor Wynkoop made a motion to accept the Florida Department of Environmental Protection Audit, Councilmember Roberts seconded the motion. The Florida Department of Environmental Protection Audit accepted 5-0.

PUBLIC HEARINGS, ORDINANCES AND RESOLUTIONS

Resolution No. 2025-195 A Resolution of the Town Council of the Town of Montverde, Florida, Relating to the Florida Department of Environmental Protection (FDEP) State Revolving Fund (SRF); Adopting the Town of Montverde Stormwater Facilities Plan Dated September 2025 for the Implementation of Stormwater Improvements; Authorizing the Town Manager to Implement the Stormwater Improvements; Authorizing the Town Manager to Implement the Stormwater Improvements; Providing an effective date.

Town Attorney Geraci-Carver read the resolution by title only.

There was a brief discussion regarding the Stormwater Facilities Plan.

Scott Shannon, Woodard and Curran, explained the Stormwater Facilities Plan and the grant process.

Mayor Wynkoop asked for clarification on the objective.

Scott Shannon further explained the plan and introduced Amanda Boone.

Amanda Boone, Project Manager for Woodard & Curran, delivered a presentation regarding the Stormwater Facilities Plan.

There was an elaborate discussion.

Town Manager Larino explained the plan and the grant process.

There was further discussion on the plan.

Councilmember Roberts asked Town Planner Parks about his experience with bonds and line of credits.

Town Planner Parks provided a brief example of a recent event with the County where a line of credit was needed and briefly explained bonds and line of credits.

There was further discussion regarding the facilities plan and the alternatives.

Mayor Wynkoop opened the public hearing.

Kelly Moore, 17029 Florence View Drive, Montverde, FL, shared his thoughts regarding the stormwater and shared his concerns.

There was a brief discussion.

Zachary Zumwalt, 17557 County Road 455, Montverde, FL shared his concerns and explained his views.

There was an elaborate discussion.

Randy Ellman, 16603 Lowry Road, Montverde, FL, inquired about the costs of the facilities plan.

Mayor Wynkoop provided an explanation.

There was an elaborate discussion on the costs and funding.

Matthew Baumann, 1122 Imperial Street, Groveland, FL, shared his views on the need for the project.

There was an extensive discussion.

Aaron Wadsworth, 17647 Ninth Street, Montverde, FL, shared his views on the benefits of the project.

There was additional discussion.

Councilmember Morganelli shared his views and concerns and would like additional information regarding bonds.

Kelly Moore stated that Mayor Wynkoop made a good point and expressed his concerns.

Allan Hartle expressed his concerns regarding Fosgate Road and the stormwater and shared his views.

Councilmember Morganelli inquired about the additional maintenance costs that will be required.

Town Manager Larino explained that in some areas it will reduce the maintenance costs and increase it in other areas, and he provided additional information.

There was additional discussion.

Councilmember Morganelli asked Town Attorney Geraci-Carver to look up the town's charter, Article 5 - Section 5.06 so they can discuss.

Allan Hartle spoke of the County Road 455 water problems.

There was additional discussion.

Donald Limpham, 16533 Pine Timber Avenue, Montverde, FL stated that he feels certain areas need improvements and expressed his concerns regarding Seventh Street and County Road 455 and further explained his views. He also spoke of staff, the town landscaping and the facilities plan.

There was an elaborate discussion.

Mayor Wynkoop closed the public discussion

There was an elaborate discussion regarding the project and moving forward.

Mayor Wynkoop made a motion to approve Resolution No. 2025-195, Vice Mayor Womack seconded, Resolution No. 2025-195 Approved 3-2.

Resolution No. 2025-196 A Resolution of the Town Council of the Town of Montverde, Florida, increasing the residential and commercial solid waste fees resulting from increased disposal costs passed on by the service provider to the Town; Providing for conflicts, severability and an effective date.

Town Attorney Geraci-Carver read the resolution by title only.

Mayor Wynkoop asked for clarification.

Town Attorney Geraci-Carver briefly explained the resolution.

Town Manager Larino also briefly provided details of the resolution.

Mayor Wynkoop opened to public hearing.

No one spoke in favor of or against the resolution.

Mayor Wynkoop closed the public hearing.

There was a brief discussion.

Councilmember Morganelli moved to approve Resolution No. 2025-196, Councilmember Rubio seconded the motion. Resolution No. 2025-196 approved 5-0.

Resolution No. 2025-197 A Resolution of the Town Council of the Town of Montverde, Florida Amending the 2024-2025 Fiscal Year Budget Pursuant to Section 5.05 of the Town Charter to Transfer Funds from General Fund Revenues to various general fund departments for increased expenditures in the permitting department; and garbage /solid waste services fees; providing for an effective date.

Town Attorney Geraci-Carver read the resolution by title only.

Town Manager Larino explained the resolution.

Councilmember Morganelli asked for additional information regarding permitting fees.

Town Manager Larino explained the permitting fees.

Mayor Wynkoop opened the public hearing.

No one spoke in favor of or against the resolution.

Mayor Wynkoop closed the public hearing.

There was an elaborate discussion.

Vice Mayor Womack made a motion to approved Resolution No. 2025-197, Councilmember Morganelli seconded the motion. Resolution No. 2025-197 approved 5-0.

Mayor Wynkoop reminded everyone of the Planning & Zoning Meeting to be held the following day.

Councilmember Morganelli stated that he would like to have a basic summary of Town Manager Larino's time, such as what time is being spent and where to allow them to see a lapse in staffing as to be proactive and asked the Council for their thoughts. He also would like the Council to be cognizant of the time being cashed out and monitor it.

There was a brief discussion.

Town Attorney Geraci-Carver stated that she would have to go back and review the contract as the reported time is approved by the Mayor, she will review to make sure that this is not contrary to what the contract states.

There was additional discussion on time reporting.

Councilmember Morganelli mentioned that he would also like for the Vision & Public Safety Committee to provide updates every quarter.

Mayor Wynkoop motioned to adjourn the meeting, Councilmember Roberts seconded the motion. Meeting adjourned 10:37 PM.

Joe Wynkoop, Mayor

Attest:

Caroline Trepanier, Town Clerk



Q Search



About ParkView

Connecting communities to the parks they love



Our Story

ParkView was born out of a shared passion for sports among a group of friends who first connected on the sidelines of Crescent Lake Park in St. Petersburg, FL. Frustrated by long waits—often 10 paddles deep in the rack—we found ourselves wondering if nearby courts had shorter lines. Other times no one would be around to play. Adding to the challenge were Florida's unpredictable summer thunderstorms, where one court could be drenched while another just a few minutes away remained dry. Park rules and

level of play varied from park to park. With so much uncertainty, we envisioned a way to know beforehand!



Our Mission

ParkView was created to solve these challenges and more. Our mission is simple: ***to improve the park-going experience through real time insights.***

Live views that help the community find places to play, see how busy the courts are, and the real-time weather conditions before they go. Additionally, park information that provides the park's rules, hours, and level of play. Whether you are a beginner interested in learning a new sport and meeting friends or a player seeking out the best competition, ParkView can help!



Our Team

Our team has a deep connection to Parks and Recreation, with backgrounds across a wide range of sports and activities, including tennis, volleyball, baseball, basketball, soccer, and football. We believe in the power of recreational spaces to bring communities together and foster wellness. Join us in transforming the way we experience parks—because everyone deserves to spend less time driving, waiting, and wondering and more time enjoying the activities they love!

**Does your park need to be more
connected to your park-goers?**

Nov 9, 2025

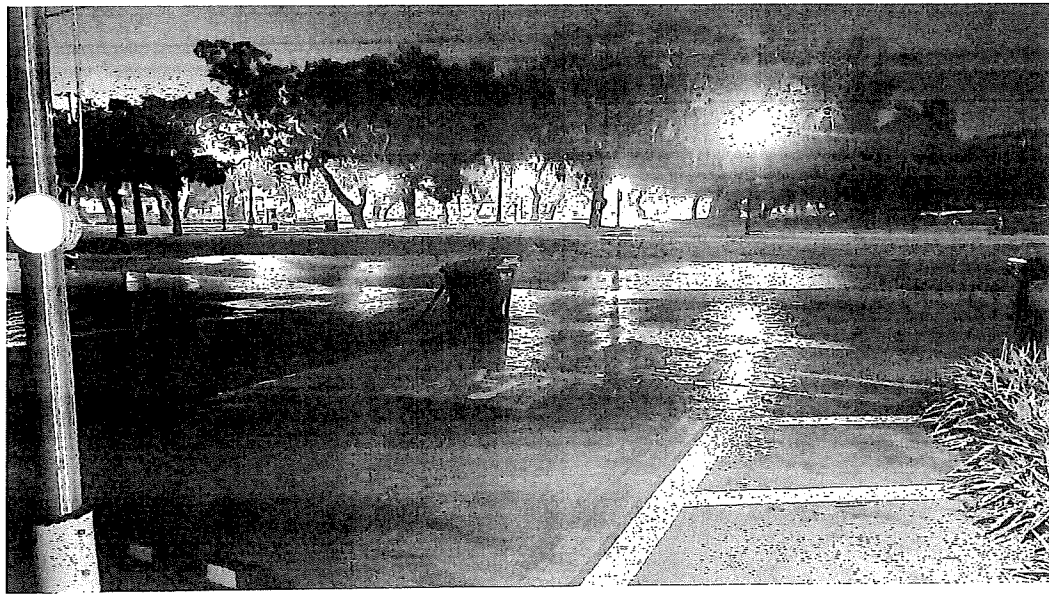


**RESTORE ASPHALT DRIVE
WITHIN ROW - MAINTAIN
EXISTING RADII**

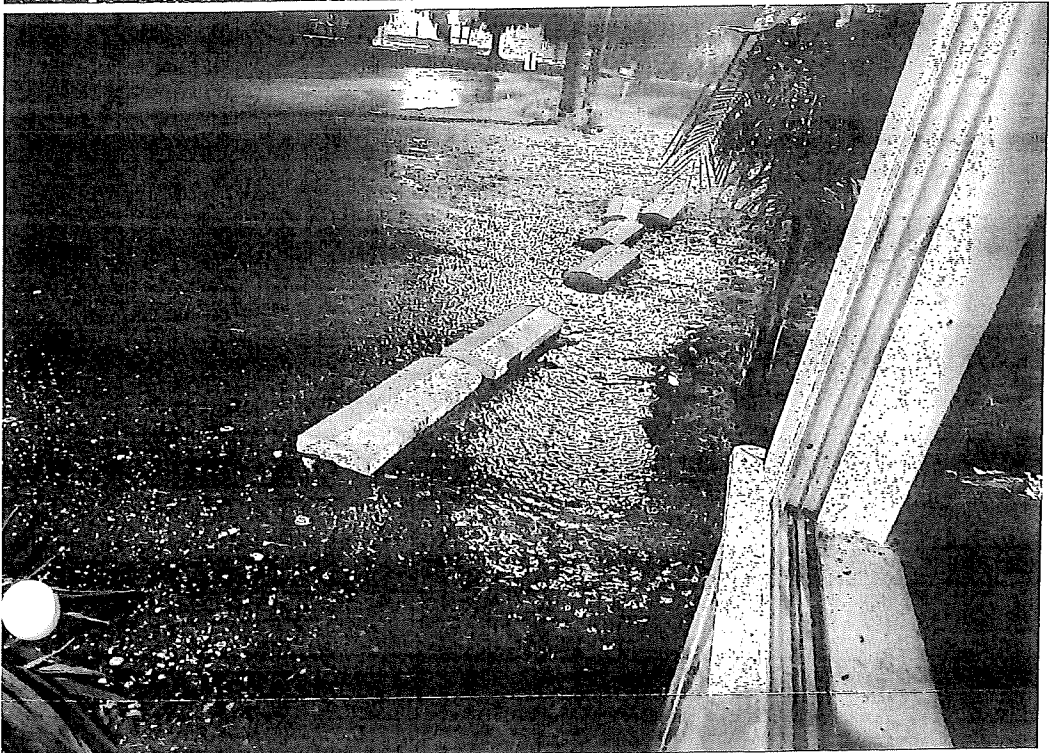
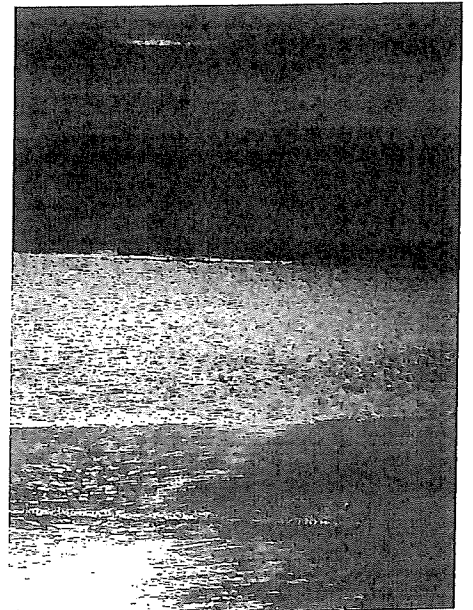
**CUT 12" WIDE, RECTANGULAR
NOTCH AT EL=101.80
INTO WEST SIDE OF
EXISTING CONCRETE INLET
EPOXY COAT EXPOSED REBARS**

**RESTORE ASP
WITHIN ROW
EXISTING RAI**





OCT 26, 2025



Town of Montverde – Proposed Charter Amendment

Good evening, Mayor and Members of the Council.

Thank you for the opportunity to speak tonight. I would like to propose an amendment to *Article II of the Town Charter*, addressing council terms, term limits, and election scheduling.

Purpose of the Amendment

The goal of this amendment is to modernize and strengthen our Town's governance structure by:

1. Reducing turnover and improving continuity in leadership.
2. Reducing election-related costs and administrative burdens by holding elections every two years instead of annually.
3. Aligning our Charter with broader trends toward term limits that promote healthy rotation and accountability in public office.

Key Provisions

- Establishes four-year terms for both the Mayor and Council Members.
- Limits any individual to five total terms of elected service, whether as Mayor, Council Member, or in combination.
- Begins a transition schedule in 2027:
 - The Mayor and two Council seats will be elected to four-year terms.
 - The 2028 election will fill the remaining two Council seats for one-year terms, establishing a balanced staggered cycle starting in 2029.

Benefits to the Town

Continuity:

Longer, staggered terms ensure institutional knowledge is retained and allow Council Members to see major projects and initiatives through to completion.

Efficiency and Cost Savings:

Moving from annual to biennial elections will significantly reduce election preparation costs and the administrative burden on staff.

Accountability and Modernization:

Implementing clear term limits aligns Montverde with the growing statewide and national trend toward responsible, citizen-focused governance.

Town of Montverde Charter Amendment Ordinance 2026-__

AN ORDINANCE OF THE TOWN OF MONTVERDE, FLORIDA, AMENDING ARTICLE II OF THE TOWN CHARTER TO ESTABLISH FOUR-YEAR TERMS OF OFFICE FOR THE MAYOR AND TOWN COUNCIL MEMBERS; TO PROVIDE A FIVE-TERM LIMIT APPLICABLE TO ANY COMBINATION OF SERVICE AS MAYOR OR COUNCIL MEMBER; PROVIDING FOR A TRANSITIONAL IMPLEMENTATION SCHEDULE FOLLOWING THE NOVEMBER 2026 ELECTION; PROVIDING FOR SEVERABILITY, CONFLICTS, AND AN EFFECTIVE DATE.

Section 1. Amendment to Article II – Town Council

Section 2.02(b) – Terms. 1. Beginning with the election cycle following voter approval of this amendment at the November 2026 general election, the term of office for the Mayor and all Town Council Members shall be four (4) years. 2. No person shall serve more than five (5) total terms in elected office within the Town of Montverde, whether as Mayor, as a Town Council Member, or in any combination of those offices. 3. A “term of office” shall include any period of service for which the individual was elected or appointed to fill a vacancy if the individual serves more than fifty percent (50%) of that term. 4. Any service in an elected capacity prior to the effective date of this amendment shall count toward the five-term limit only if the official is serving a full four-year term at the time this amendment takes effect. 5. The transitional schedule for implementing the four-year terms shall follow Section 2.10 of this Article.

Section 2.03(b) – Mayor. The voters of the town shall elect a Mayor at large for a four-year term beginning with the first election following voter approval of this amendment at the November 2026 general election. The council shall elect from among its members a Vice-Mayor who shall act as Mayor during the absence or disability of the Mayor and, if a vacancy occurs, shall become Mayor for the remainder of the unexpired term. Service as Mayor shall be counted toward the five-term limit established in Section 2.02(b).

Section 2.10 – Transitional Implementation of Four-Year Terms and Staggered Elections (New) a) Effective Date. If this amendment is adopted by the electors at the November 2026 election, it shall take effect for the first municipal election held thereafter. b) 2027 Election. At the 2027 municipal election, the offices of Mayor and two (2) Town Council seats shall be elected for four-year terms expiring in 2031. c) 2028 Election. At the 2028 municipal election, the remaining two (2) Town Council seats shall be elected for an initial one-year term expiring in 2029. d) 2029 Election and Thereafter. Beginning with the 2029 municipal election, the two (2) seats elected in 2028 shall thereafter be elected for regular four-year terms, establishing a continuing staggered cycle so that no more than two (2) Council seats and the Mayor are elected in any one year. e) Short or Interim Terms. Any shorter or interim term resulting from this transition or from a vacancy filled for less than fifty percent (50%) of a standard four-year term shall not count toward the five-term limit established in Section 2.02(b).

Section 2. Effective Date. This ordinance shall take effect immediately upon approval by referendum of the qualified electors of the Town of Montverde in the November 2026 general election.

ARTICLE II – TOWN COUNCIL (Proposed Redline Amendment – Ordinance 2026-__)

Section 2.02(b) – Terms.

~~The term of office of elected officials shall be two (2) years elected in accordance with Article VI and except as provided in Article VI.~~

1. Beginning with the election cycle following voter approval of this amendment at the November 2026 general election, the term of office for the Mayor and all Town Council Members shall be four (4) years.
2. No person shall serve more than five (5) total terms in elected office within the Town of Montverde, whether as Mayor, as a Town Council Member, or in any combination of those offices.
3. For purposes of this subsection, a “term of office” shall include any period of service for which the individual was elected or appointed to fill a vacancy if the individual serves more than fifty percent (50%) of that term.
4. Any service in an elected capacity (Mayor or Council Member) prior to the effective date of this amendment shall count toward the five-term limit only if the official is serving a full four-year term at the time this amendment takes effect.
5. The transitional schedule for implementing the four-year terms shall follow Section 2.10 of this Article.

Section 2.03(b) – Mayor.

~~The voters of the town shall elect a mayor at large for a term of two (2) years.~~

The voters of the town shall elect a Mayor at large for a four-year term beginning with the first election following voter approval of this amendment at the November 2026 general election.

The council shall elect from among its members a Vice-Mayor who shall act as Mayor during the absence or disability of the Mayor and, if a vacancy occurs, shall become Mayor for the remainder of the unexpired term.

Service as Mayor shall be counted toward the five-term limit established in Section 2.02(b).

New Section 2.10 – Transitional Implementation of Four-Year Terms and Staggered Elections

a) Effective Date. If this amendment is adopted by the electors at the November 2026 election, it shall take effect for the first municipal election held thereafter.

b) 2027 Election. At the 2027 municipal election, the offices of Mayor and two (2) Town Council seats shall be elected for four-year terms expiring in 2031.

c) 2028 Election. At the 2028 municipal election, the remaining two (2) Town Council seats shall be elected for an initial one-year term expiring in 2029.

d) 2029 Election and Thereafter. Beginning with the 2029 municipal election, the two (2) seats elected in 2028 shall thereafter be elected for regular four-year terms, establishing a continuing staggered cycle so that no more than two (2) Council seats and the Mayor are elected in any one year.

e) Short or Interim Terms. Any shorter or interim term resulting from this transition or from a vacancy filled for less than fifty percent (50%) of a standard four-year term shall not count toward the five-term limit established in Section 2.02(b).

**MONTVERDE TOWN COUNCIL
REGULAR MEETING
MINUTES
September 9, 2025, AT 7:00 PM**

TOWN COUNCIL MEMBERS PRESENT

Joe Wynkoop, Mayor
Carol Womack, Vice Mayor
Allan Hartle, Councilmember
Joe Morganelli, Councilmember
Grant Roberts, Councilmember

STAFF PRESENT

Paul Larino, Town Manager
Anita Geraci-Carver, Town Attorney
Sean Parks, Town Planner
Lisa Busto, Associate Planner
Caroline Trepanier, Administrative Assistant

CALL TO ORDER AND OPENING CEREMONIES

- Pledge of Allegiance
- Invocation
- Roll Call

CITIZENS QUESTION/COMMENT PERIOD

Mayor Wynkoop opened the public discussion.

Mike Stone Jr., 16301 Burke Street, Montverde, FL spoke of the ongoing construction on lakeside, stated his concerns with the effect on businesses, would like to be notified accordingly regarding road closures and explained the burden on the businesses in town. He also spoke of compensation due to the road closures as well as the possibility of obtaining grants for local businesses. He also explained that he was hopeful to run for Mayor and that he did obtain a checking account, it was not a campaign account, and that he was disqualified as a result.

Mayor Wynkoop addressed the road closure and asked for clarification.

Mike Stone, Jr., further explained his concerns regarding construction safety and road closures.

Mayor Wynkoop asked Town Manager Larino if proper notice could be given in the future.

Town Manager Larino stated that he met with the foreman and that they are to give businesses a five (5) day notice before any future road closures. He also mentioned that he previously took care of the road closure issue and that it was cleared within 40 minutes.

Mayor Wynkoop informed Mike Stone, Jr. of the ISBA grant and asked Town Manager Larino if there are any other grants we could assist with.

Town Manager Larino explained the different options; he also mentioned that CRA funds would assist.

There was additional discussion regarding business improvements and small business assistance.

Councilmember Morganelli asked Mike Stone, Jr., for clarification regarding the campaign account.

Mike Stone Jr. provided additional information.

Town Attorney Geraci-Carver explained that the campaign account is a requirement of the Town's code and provided further details.

There was a brief discussion.

Farmer Helfrich spoke of the weather months and discussed family, services to the community, and to wake up, dress up, show up, listen up, speak up, follow up and never give up.

Dan Davis, 16849 Lake Street, Montverde, FL, Town Volunteer, explained his duties and that he is there for safety and security reasons. He provided details of a recent situation where a resident misunderstood his role as a town volunteer in the community. He also spoke highly of the Town Council. He would like the town to send out information explaining his job duties and responsibilities to the residents.

Vice Mayor Womack asked about the code enforcement process.

Town Manager Larino explained the process.

There was further discussion regarding code complaints and code violation processes.

Councilmember Morganelli asked about code complaints and adding the code violation process to the town website.

Town Manager Larino said that he will work on adding the process to the town website.

There was additional discussion regarding code complaints.

Councilmember Roberts asked for clarification regarding the code complaint process for trees.

There was continued conversation on the process of cutting trees down

Matthew Baumann, 1122 Imperial Eagle Street, Groveland, FL said that he attended the last code meeting and thinks the new magistrate is very professional and considerate. He also asked if the town was still pursuing a CRA and provided CRA details.

Mayor Wynkoop said that it was not discussed, however, things could change after the election.

Vice Mayor Womack asked if the CRA clock was running out.

Town Attorney Geraci-Carver said that the legislation did not pass.

Councilmember Roberts asked Matthew Bowman if he noticed a positive or negative aspect to CRAs.

Matthew Baumann said that the CRA helped with façade grants downtown. They redid the whole downtown and fixed up a lot of the old buildings and built the community center for empowerment.

Mayor Wynkoop asked if it helped the businesses.

Matthew Baumann said that it improved the look of downtown considerably. Some grants helped businesses remodel.

There was additional discussion.

Christian Reyes 17701 8th street, Montverde, FL, thanked everyone for making the community safe and spoke of his concerns. He explained that he missed a meeting he wanted to attend, shortly following hurricane Milton, and asked if the Town Council would consider establishing a policy that offers a grace period with clear communication of the town actions on decisions important to residents after natural disasters. He also spoke of the Distributed Wastewater Treatment System program and the Department of Environmental Protection and his interpretations of the town's code and policies on DWTS. He asked about the town's highest priority.

There was a brief discussion.

Town Manager Larino explained that the October meeting regarding the sewer decision had to take place due to a DEP grant deadline and explained it further.

Town Manager Larino also explained that DEP is the regulating authority, not the town when it comes to sewer systems.

Town Attorney Geraci-Carver stated that in some instances towns can adopt stricter code than what the State Statutes are as long as it is not a conflict however, with DEP regulations, only DEP has the authority to adopt regulations relating to septic and sewer.

Christian Reyes shared additional views regarding the town, the new developments, the wastewater system and the effects on local businesses and shared further views.

Mayor Wynkoop closed the public discussion.

DEPARTMENT & COMMITTEE REPORTS

Town Manager Larino's Report

Town Manager Larino expressed that he wanted to spend time explaining the different Town of Montverde grants, the grant agreement process, the grant planning stage, and the design phase and provided additional details.

Town Manager Larino's Capital Project Update

1. Library
2. Library Emergency Generator
3. Outdoor Park Bathroom
4. Small Water Storage Tank and Pump House
5. Community Building
6. Fire Station – County
7. Kirk Park Playground
8. Ridgewood Ave – ADA Ramps and Sidewalk Connections
9. Lakeside Ave Storm/Street Project

10. Porter and 1st Storm/Street Project
11. Boat Ramp and Storm Project
12. Truskett Park – Dock, Storm, FEMA Recovery
13. 455 Storm Street, Sidewalk Project
14. 8th, 9th, Temple Street, Sidewalk, and Storm
15. Well # 1 Generator Replacement
16. Elevated Water Storage Tank
17. Redundant Upper Floridan Well
18. New Lower Floridan Well
19. Consumptive Use Permit
20. Water line Upsizing, Loops, and Hydrants
21. Butterfly Garden - Completed
22. Sports Court – Completed
23. Kirk Park Stage – Completed
24. Baseball Field Conversion – Completed
25. Public Works Storage – Completed
26. Park Lighting – Completed

Town Manager Larino provided an update of the capital projects.

Councilmember Hartle asked for clarification on some of the capital projects.

Town Manager Larino would like the town to identify an alternative water supply and he spoke of the LFA well.

Councilmember Morganelli asked about adding a survey on the website, to ask residents how we are doing,

There was a brief discussion regarding a survey.

Town Attorney Geraci-Carver shared information regarding Senate Bill 180, a legislation that just passed, it precludes local governments from adopting more burdensome regulations if you were within an area that has been declared a state of emergency for hurricane or other disasters. Litigation is being filed this month by at least ten (10) local governments in the state to challenge the constitutionality of that and that the attorneys have solicited other local government attorneys to see if any of our cities or towns would like to join in the litigation as a named defendant.

Town Planner Parks stated that they did not join, and they asked that it be added to the legislative agenda and the commission went forward with that. It is the top item in our legislative agenda to reform and to repeal it and do something different with it. He provided additional details.

There was additional discussion.

Associate Planner Busto provided a brief update; they have a few zoning clearances and code changes coming up.

Town Planner Parks provided an update on the Public Lands Acquisition Committee; the first meeting will be held in October. He also provided a brief update on Comprehensive Plan changes in 2026, the Comp Plan survey and mentioned the JPA Roundtable meeting which includes 14 cities, provided an update on transportation and revenues, policy changes, gas tax, and briefly explained impact fees.

There was an elaborate discussion.

Randy Ellman, 16603 Lowry Road, Montverde, FL asked about CRA funds.

Town Planner Parks provided a brief explanation of CRA funds.

There was an elaborate discussion on roads, CRA funds & impact fees.

Councilmember Roberts asked about the town pickleball courts and inquired on possible water quality issues.

Town Manager Larino stated that he will follow up with the Public Works Director, said that there may be air in the line and stated that that we do not have water quality issues.

There was additional discussion regarding the water quality.

Councilmember Roberts asked about the process of selecting the contractor working on Lakeside Drive.

Town Manager Larino explained the bidding process.

Councilmember Morganelli spoke of the signage and the current election.

Town Manager Larino explained the rules regarding the location of election sign.

Councilmember Hartle shared his concern regarding our town cemetery and mentioned that the town provided arrangements of flowers and asked if a notification could be provided when someone passes away.

Town Attorney Geraci-Carver will have to look into this.

Mayor Wynkoop provided a brief update on the Osgood property and the Bella Collina property. He also spoke of the charter change vote listed on the ballot and explained that his priority is for Montverde to be built out the way the residents would want Montverde to be.

Jojo Forehand, 17235 1st Street, Montverde, FL asked what the town is planning to do with Anthony Island.

There was a brief discussion regarding the island.

AUGUST FINANCE REPORT

Beginning Bank Balance	\$ 4,859,085.66
Revenues	\$ 377,407.32
Expenditures	\$ 753,395.52
Ending Balance	\$ 4,483,097.46
Pending Liabilities	\$ 138,106.44
Available Cash	\$ 4,344,991.02
 Total Bank Balance	 \$ 4,344,991.02

Mayor Wynkoop highlighted the August Finance Report.

Discussion regarding the lake at Franklin Pond.

Town Manager Larino provided an update regarding Franklin Pond and its condition. He also shared ways to improve the pond.

There was an elaborate conversation regarding Franklin Pond.

George Ganzenmuller, 17740 Neal Drive, Montverde, FL shared his views on the pond's current condition and the best course of action.

There was additional discussion regarding Franklin Pond and ways to improve the water quality.

Town Manager Larino will do additional research.

Discussion relating to school zone speed limit cameras.

Town Manager Larino provided information on the school zone camera system.

There was an elaborate discussion regarding adding cameras and walkways.

Bryan Rubio, 1654 Magnolia Terrace, Montverde, FL asked for the reason the speed cameras are a topic on the agenda.

Town Manager Larino explained that data was pulled in the past and that up to 70 mph speeds were recorded, he also explained that law enforcement has been busy in our school zone areas.

There was an elaborate discussion regarding school cameras.

Town Manager Larino will obtain a ballpark estimate of the revenue the cameras will generate and will research additional data.

Discussion of a single email link to all council members

Councilmember Morganelli asked about adding each council member's email address to the town website.

There was a brief discussion.

Town Manager Larino will add this to the website.

Resolution No. 2025-187 A Resolution of the Town Council of the Town of Montverde, Florida, Approving Task Order Proposal dated August 21, 2025 between the Town of Montverde and Woodard & Curran, Inc. for Design, Permitting, Bidding, Project Management, Construction Administration, and Fiscal/Grant Administration of Stormwater Improvements Funded by the Supplemental Appropriation for Hurricanes Fiona and Ian; Authorizing the Town Manager to Execute the Agreement; Providing for an Effective Date.

Town Attorney Geraci-Carver read the resolution by title only.

Scott Shannon, Woodard and Curran, briefly explained the stormwater project, and that this resolution is for the design and services during construction.

Mayor Wynkoop opened the public hearing.

No one spoke in favor or against.

Mayor Wynkoop closed the public hearing.

There was additional discussion regarding approving the task order.

Councilmember Hartle made a motion to approve Resolution No. 2025-187, Councilmember Roberts seconded. Resolution No. 2025-187 Approved 5-0.

Resolution No. 2025-188 A Resolution of the Town Council of the Town of Montverde, Creating and Appointing a Municipal Canvassing Board to serve for the November 2, 2025 Town Election; Providing for Duties and a Term; And Providing for an Effective Date.

Town Attorney Geraci-Carver read the resolution by title only.

Mayor Wynkoop explained that the reason for the resolution is to appoint a municipal canvassing board.

Town Attorney Geraci-Carver explained the duties of a canvassing board as well as the serving process.

Town Manager Larino stated that he is appreciative of the City of Groveland as they agreed to act as our canvassing board.

Mayor Wynkoop opened the public hearing.

No one spoke in favor or against

Mayor Wynkoop closed the public hearing.

There was additional discussion regarding appointing a municipal canvassing board.

Councilmember Morganelli moved to approve Resolution No. 2025-188, Councilmember Hartle seconded the motion. Resolution No. 2025-188 Approved 5-0.

There was a brief discussion.

REMINDERS AND ADJOURNMENT

Mayor Wynkoop moved to adjourn the meeting. Councilmember Morganelli seconded.

Meeting adjourned at 9:19 PM.

Joe Wynkoop, Mayor

Attest:

Caroline Trepanier, Town Clerk

**MONTVERDE TOWN COUNCIL
SPECIAL MEETING
MINUTES
September 10, 2025, AT 6:30 PM**

TOWN COUNCIL MEMBERS PRESENT

Joe Wynkoop, Mayor
Carol Womack, Vice Mayor
Allan Hartle, Councilmember
Joe Morganelli, Councilmember
Grant Roberts, Councilmember

STAFF PRESENT

Paul Larino, Town Manager
Anita Geraci-Carver, Town Attorney
Mai Yang, Finance Director
Caroline Trepanier, Administrative Assistant

CALL TO ORDER AND OPENING CEREMONIES

- Pledge of Allegiance
- Invocation
- Roll Call

PUBLIC HEARINGS, ORDINANCES AND RESOLUTIONS

Resolution No. 2025-190 A Resolution of the Town Council of the Town of Montverde, Florida, Adopting the Final Levying of Ad Valorem Taxes for the Town of Montverde, Lake County, Florida for Fiscal Year 2025-2026; Providing an Effective Date.

Town Attorney Geraci-Carver read the resolution by title only.

Town Manager Larino briefly went over the millage rate, he shared that our millage rate is the lowest in Lake County, he then explained the FY 2026 General Budget Expenditures, the FY 2025 Water Enterprise Expenditures and the Capital Projects Projected Expenditures.

Mayor Wynkoop opened the public discussion.

Candace Keys, 16831 Florence View Drive, Montverde, FL spoke of the Town Manager responsibilities, the qualities Town Manager Larino demonstrates, she also spoke of his leadership and shared her views for Town Council supporting him in his role.

Lance Belcher, 17720 Virginia Cir, Montverde, FL spoke of the town changes in the last ten (10) years, and the change of strong Mayor to having a Town Manager, spoke highly of the decision to have a Town Manager, and further shared positive feedback regarding Town Manager Larino.

Jim Ley, 17328 First Street, Montverde, FL spoke of the town employees, he said that they work hard and do their job. He also expressed his views regarding the employees having Fridays off and that he approves. He also shared a previous employment experience and spoke about retaining employees and retaining our Town Manager.

Josie Weiss, 17343 10TH Street, Montverde, FL stated that she is a board member on the Planning & Zoning Committee. She shared that she believes Town Manager Larino deserves the maximum raise amount.

Elske Palmer, 17606 Third Street, Montverde, FL said that she really appreciated all that Town Manager Larino does, she further shared her thoughts about Town Manager Larino's dedication to the town. She also said that she approves of the compensation packages.

Kalena Meyers, 17313 Second Street, Montverde, FL commented on the privilege of working with Town Manager Larino on the Strategic Visioning Committee, she further shared her views on being on a committee. She spoke of volunteering behind the scenes. She stated that she noticed all the things Town Manager Larino has done around town. He works very hard and she sees him out with his wife on the weekend cleaning up around town. She said that she wholeheartedly wanted to speak in support of the budget requests.

John Arellano, 17531 County Road 455, Montverde, FL said that Town Manager Larino is a great guy and that the town did a great thing by hiring him.

John Hopman 17127 9th Street, Montverde, FL stated that he moved here in 2001, shared that the relationship with the academy is good and that Town Manager Larino is critical to operations and that we must take care of the people that are critical to the operation.

Mayor Wynkoop closed the public hearing.

Councilmember Morganelli stated that he listens to the residents and inquired about the number of employees and suggested a raise for all employees.

Mayor Wynkoop explained the budget.

There was a discussion on the budget and the salaries.

Mayor Wynkoop asked if the Council wanted to move forward with an additional bonus.

There was additional discussion.

Town Manager Larino spoke of the clerk and finance positions and that he is analyzing those positions and briefly spoke of other cities. Said that we can look at adding another bonus this year.

Vice Mayor Womack made a motion to approve Resolution No. 2025-190, Councilmember Hartle seconded. Resolution No. 2025-190 approved 5-0.

Resolution No. 2025-189 A Resolution of the Town Council of the Town of Montverde, Lake County, Florida, Adopting the Final Budget for Fiscal Year 2025-2026; Providing an Effective Date.

Town Attorney Geraci-Carver read the resolution by title only.

Mayor Wynkoop opened the public hearing.

No one spoke in favor or against.

Mayor Wynkoop closed the public hearing.

Vice Mayor Womack made a motion to approve Resolution No. 2025-189, Councilmember Morganelli seconded, Resolution No. 2025-189 approved 5-0.

REMINDERS AND ADJOURNMENT

Mayor Wynkoop made a motion to adjourn, Vice Mayor Womack seconded.

Meeting adjourned at 7:24 PM.

Joe Wynkoop, Mayor

Attest:

Caroline Trepanier, Town Clerk

**Citizen recommendation to Montverde Town Council by John and Candi Keys, 16831
Florence View Drive, Montverde (9/10/2025)**

As you know, the Town Manager's responsibility is to **implement the plans approved by the Town Council**, not to make development or infrastructure decisions independently.

- This role requires **experience, professionalism, and dedication**—qualities Paul consistently demonstrates.
- Observations over the past five years:
 - Paul approaches his role with **no personal agenda**.
 - He shows **commitment to Montverde's growth and success**, often working long hours to oversee active projects.
 - On most days, he can be found **downtown supervising projects** and even working alongside the Public Works team.
 - He cares about the citizens evidenced by the hours he and his wife have devoted in their volunteering endeavors during holidays.
- Paul is **approachable and responsive**, readily answering questions and discussing town matters with residents.
- He demonstrates **strong knowledge of policy execution, fiscal management, and municipal operations**.
- His **leadership is valued by employees**, who speak highly of his guidance.
- With Willow Ridge almost at completion, Paul has already successfully navigated the LDC. Having been down the learning curve and the development of the Osgood property being imminent, we need his expertise to ensure design and building standards continue to be met. Most Town Managers would not get this involved with developers and builders, but that's more kudos for Paul.
- My research indicates the **average tenure of a Town Manager is 5-8 years**, often shortened by political shifts within councils or boards.
- Paul took a significant cut in pay to come to Montverde. At his stage in life, he is doing what anyone would do to secure his future. Its only right his salary be competitive with other Lake County Town managers.
- Montverde would be at a loss to see Paul leave due to a **salary conflict**—or worse, to have another town recognize his value and hire him away.

Closing Appeal:

We respectfully encourage the Town Council to continue supporting Paul in his role, recognizing his contributions, and ensuring Montverde retains his leadership for the benefit of the community.

Thank you.

**MONTVERDE TOWN COUNCIL
SPECIAL MEETING
MINUTES
September 24, 2025, AT 6:30 PM**

TOWN COUNCIL MEMBERS PRESENT

Joe Wynkoop, Mayor
Carol Womack, Vice Mayor
Allan Hartle, Councilmember
Joe Morganelli, Councilmember
Grant Roberts, Councilmember

STAFF PRESENT

Paul Larino, Town Manager
Anita Geraci-Carver, Town Attorney
Caroline Trepanier, Administrative Assistant

CALL TO ORDER AND OPENING CEREMONIES

- Pledge of Allegiance
- Invocation
- Roll Call

PUBLIC HEARINGS, ORDINANCES AND RESOLUTIONS

Resolution No. 2025-191 A Resolution of the Town Council of the Town of Montverde, Florida, Adopting the Final Levying of Ad Valorem Taxes for the Town of Montverde, Lake County, Florida for Fiscal Year 2025-2026; Providing an Effective Date.

Town Attorney Geraci-Carver read the resolution by title only.

Mayor Wynkoop opened the public hearing.

No one spoke in favor or against.

Mayor Wynkoop closed the public hearing.

Councilmember Hartle made a motion to approve Resolution 2025-191, Vice Mayor Womack seconded. Resolution 2025-191 approved 5-0.

Resolution No. 2025-192 A Resolution of the Town Council of the Town of Montverde, Lake County, Florida, Adopting the Final Budget for Fiscal Year 2025-2026; Providing an Effective Date.

Town Attorney Geraci-Carver read the resolution by title only.

Mayor Wynkoop opened the public hearing.

No one spoke in favor or against.

Mayor Wynkoop closed the public hearing.

Councilmember Morganelli inquired regarding a Clermont sewer charge on page 44.

Town Manager Larino explained that the final half of the Willow Ridge homes will come in line, still a few left and estimating that the charges will go up.

Vice Mayor Womack made a motion to approve Resolution No. 2025-192, Councilmember Roberts seconded. Resolution No. 2025-192 approved 5-0.

DISCUSSIONS AND ACTION ITEMS

Montverde Academy Discussion

Town Manager Larino briefly explained this discussion item.

Brad Long, Montverde Academy, thanked the Council for their patience with the start of the new school year, stated that they are working on some parking arrangements within the school, making sure to present projects to the town and that those meet all the qualifications. He also spoke of the wetlands behind Montverde Academy, the walking trail, Seventh Street storm water collections and the retention pond for Academy Lane.

Town Manager Larino provided an update.

Brad Long briefly ended his presentation due to PowerPoint Presentation issues.

Discussion on Truskett Park's Concept Plan & Profile

Town Manager Larino discussed potential plans for Truskett Park, part of the storm water project, this would be adding a walkway, and retaining walls equipped with handrails for fall protection and he explained the plans further.

There was an elaborate discussion.

Montverde Academy Discussion

Brad Long picked up the earlier presentation and explained a potential walking trail.

Town Manager Larino also explained the potential walking trail.

There was a discussion.

Brad Long further explained the slides, detailing the potential trail and potential plans for storm water collection. He stated that he wanted to brainstorm with the Council, and to suggest ideas for down the road.

Town Manager Larino explained ways that the town and Montverde Academy have been working together.

There was an elaborate discussion.

Mayor Wynkoop said that the discussion sounded fair, where the Town & Montverde Academy borrow each other's parking area.

Discussion on Truskett Park's Concept Plan & Profile

Town Manager Larino brought back the discussion regarding Truskett Park, asked the Council if they are okay with the paver area overlooking the lake or if they wanted to keep the hill and add grass. Explained where the location of the storm water tanks would be in each scenario.

There was additional discussion on the plan.

Councilmember Morganelli asked Town Attorney Geraci-Carver about her thoughts should this be a liability issue.

Town Attorney Geraci-Carver said that she would only recommend the signs which she recommends for anyone who has lake property, to inform people about alligators, she does not feel the area, which is elevated, would be more at risk than if it were sod.

Mayor Wynkoop shared his views regarding the dangers of alligators.

There was an elaborate discussion.

Councilmember Morganelli motioned to approve the pavers, Councilman Roberts seconded the motion. The addition of pavers approved 4-1.

Town Manager's Annual Performance Review

Mayor Wynkoop briefly reviewed the annual performance review.

Mayor Wynkoop opened the public discussion.

No one spoke in favor or against.

Mayor Wynkoop closed the public discussion.

Mayor Wynkoop asked Town Attorney Geraci-Carver for clarification.

Town Attorney Geraci-Carver said that the review is being presented and asked the Council to acknowledge receipt.

Resolution No. 2025-193 A Resolution of the Town Council of the Town of Montverde, Florida, Approving the Fifth Amendment to Employment Agreement between The Town of Montverde and Paul Larino; Authorizing Execution; Providing for an effective date.

Mayor Wynkoop highlighted the changes to Town Manager Larino's Employment Agreement.

Town Attorney Geraci-Carver explained the changes to the new employment agreement.

There was a detailed discussion regarding Town Manager Larino's Employment Agreement, the changes, and the large number of hours that he works.

Vice Mayor Womack made a motion to approve Resolution 2025-193, Councilmember Hartle seconded. Resolution 2025-193 approved 5-0.

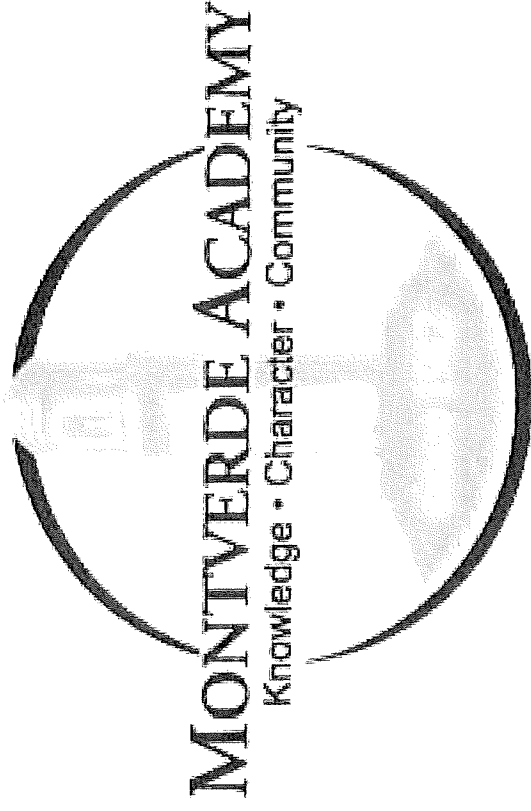
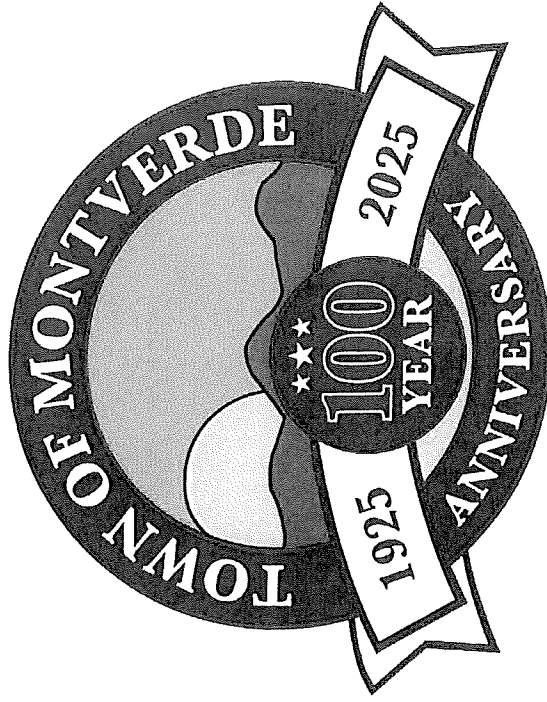
REMINDERS AND ADJOURNMENT

Councilmember Morganelli made a motion to adjourn, Councilmember Hartle seconded. Meeting adjourned at 7:24 PM.

Joe Wynkoop, Mayor

Attest:

Caroline Trepanier, Town Clerk



Special Town Council Meeting
Wednesday, September 24th, 2025

Walking / Biking Trail Access:

MVA giving easement/
access to Town of Montverde
for the trail route along the
wetlands.

■ = Proposed Trail



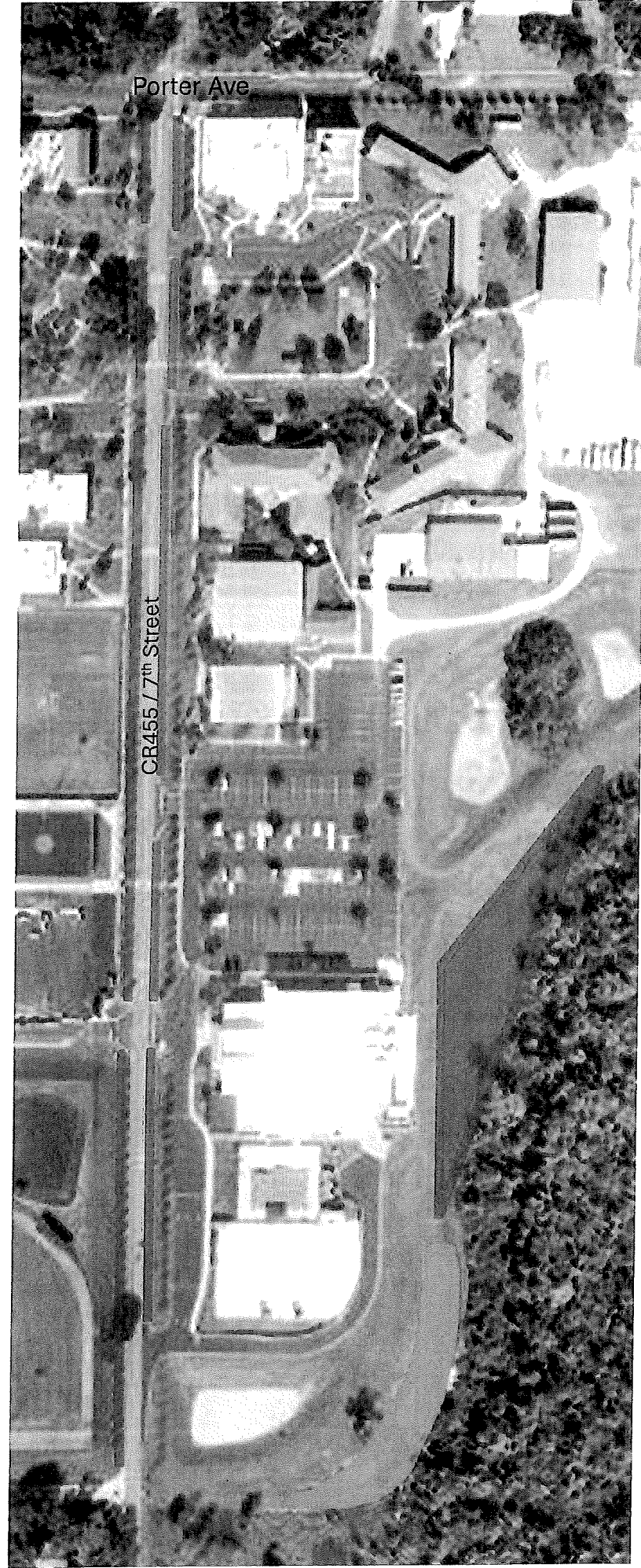
CR455/Seventh Street

Storm Water Collection off road and place
near existing retention pond.

■ = Existing TOM Retention Pond
(Academy Lane)

■ = ROW area for storm water collection

■ = Proposed easement for storm water basin



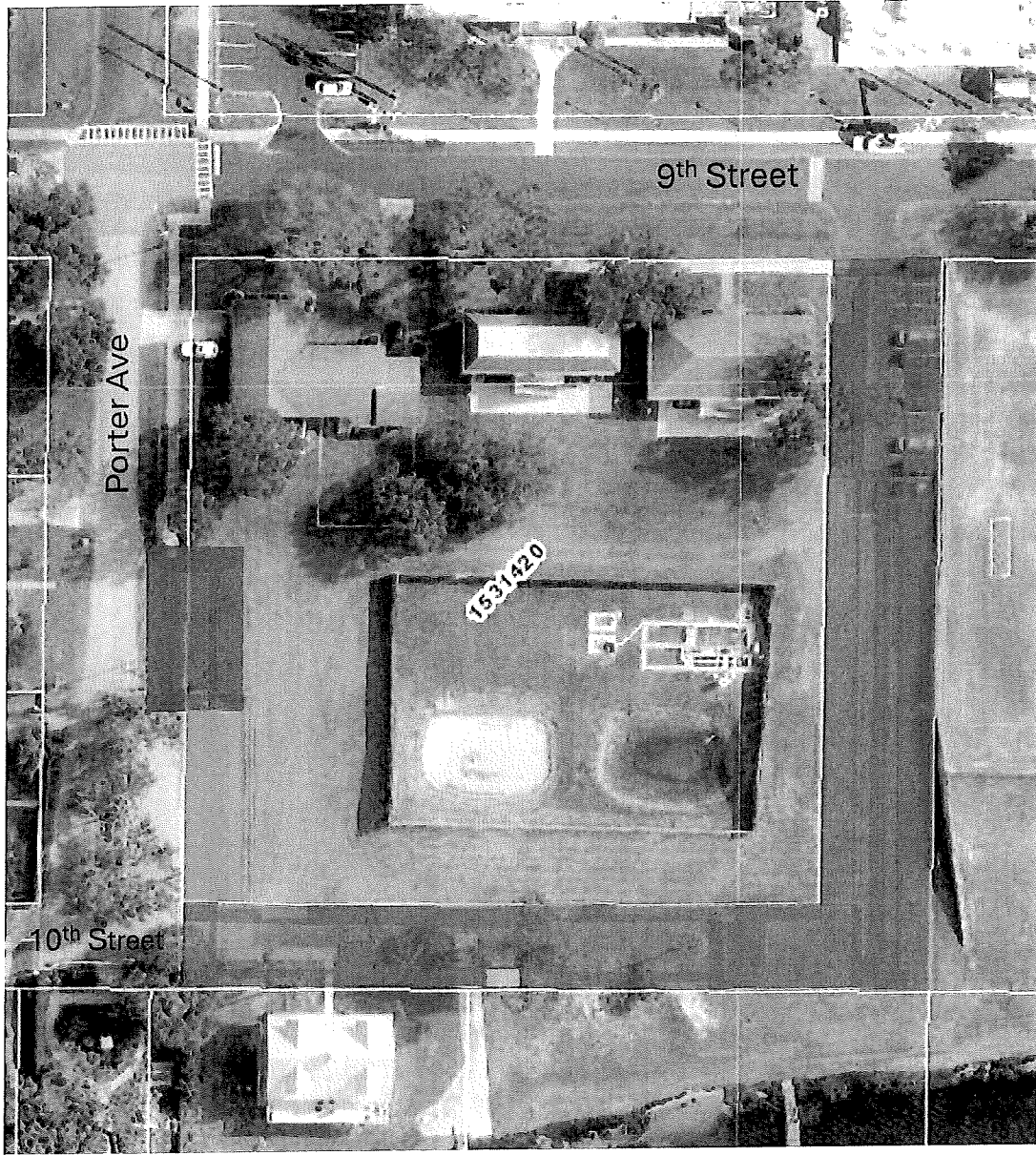
Town ROW:

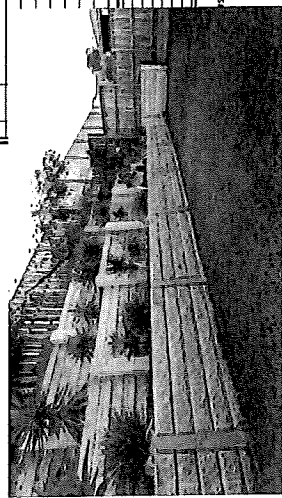
- 10th Street & Porter Avenue
- Between 9th to 10th Street

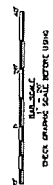
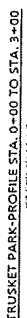
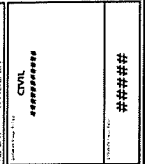
■ = Current Town of Montverde ROW

■ = Existing Parking for Park
(Academy Assisted)

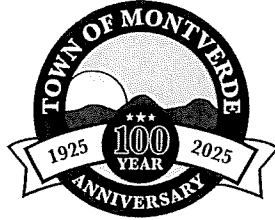
■ = Proposed Extended Parking







PUBLIC HEARINGS, ORDINANCES & RESOLUTIONS



STAFF REPORT

To: Mayor and Honorable Council Members

From: Paul Larino, Town Manager
Iman Rashid, Administrative Assistant

Date: December 4th, 2025

Subject: Resolution No. 2025-200

Background

This resolution awards a contract to Close Construction Services, LLC for the Stormwater Improvements Phase 2 project on Porter Avenue, based on the results of Invitation to Bid 2025-02. The project will be funded through two Florida Department of Environmental Protection (FDEP) stormwater grants. The resolution also approves the agreement with Close Construction Services, LLC for an amount not to exceed \$796,235.00 and authorizes the Town Manager to sign the contract.

The Town received five bids for the project, ranging from \$796,235.00 to \$1,124,714.51. The lowest responsible and responsive bid was submitted by Close Construction Services, LLC, in the amount of \$796,235.50.

Recommendation

Staff recommend that Council approve the lowest bid submitted by Close Construction Services, LLC, in the amount of \$796,235.50; approve the contract form; and authorize the Town Manager and Town Attorney to execute the standardized agreement in accordance with the requirements of the DEP Grant Agreement.

Attachments

- Bid Tabulation Design Phase 2 (Dated October 21, 2025)



BID TABULATION
Stormwater Improvements
Design Phase 2 Porter Avenue
ITB # 2025-02
October 21, 2025

<u>Bidder</u>	<u>Rank</u>	<u>Total Bid Price</u>
CPWG Constructors, LLC	4	\$ 1,124,714.51
CCC Cathcart Construction Company Florida, LLC	5	\$ 1,379,887.00
Blackwater Construction Services, LLC	2	\$ 917,588.00
Traverse Group, Inc.	3	\$ 1,109,137.50
Close Construction Services, LLC.	1	\$ 796,235.50

RESOLUTION 2025-200

A RESOLUTION OF THE TOWN COUNCIL OF THE TOWN OF MONTVERDE, FLORIDA, AWARING CONTRACT TO CLOSE CONSTRUCTION SERVICES, LLC RESULTING FROM THE TOWN'S INVITATION TO BID 2025-02 FOR STORMWATER IMPROVEMENTS PHASE 2 – PORTER AVENUE; APPROVING THE CONFORMED AGREEMENT BETWEEN THE TOWN OF MONTVERDE, FLORIDA AND CLOSE CONSTRUCTION SERVICES, LLC IN AN AMOUNT NOT TO EXCEED \$796,235.00 FOR MONTVERDE STORMWATER IMPROVEMENTS PROJECT BEING FUNDED THROUGH A FLORIDA DEPARTMENT OF ENVIRONMENTAL PROTECTION STORM WATER/CLEAN WATER GRANT AND A FLORIDA DEPARTMENT OF ENVIRONMENTAL PROTECTION LEGISLATIVE APPROPRIATIONS STORM WATER GRANT; AUTHORIZING THE TOWN MANAGER TO EXECUTE THE AGREEMENT; AND PROVIDING FOR AN EFFECTIVE DATE.

WHEREAS, the Town of Montverde, Florida received funding for stormwater projects from a Florida Department of Environmental Protection (FDEP) Stormwater/Clean Water Grant (Grant #22FRP102) and a FDEP Legislative Appropriations Storm Water Grant (Grant #LPA0589); and

WHEREAS, the Town issued an Invitation to Bid on September 22, 2025 inviting sealed bids for stormwater improvements which includes, clearing and grubbing, tree removal, full depth pavement reconstruction, roadway widening, driveway apron reconstruction, installation of curbing, installation of sidewalk, construction of stormwater Best Management Practices, revegetation, and all materials and equipment, construction, and services inherent in the foregoing described work (the "Project"); and

WHEREAS, five bids were received, and the sealed bid submitted by Close Construction Services, LLC, was the lowest, most responsive, responsible bidder; and

WHEREAS, the Town Council finds it to be in the public interest to award a contract to Close Construction Services, LLC and to approve the Conformed Agreement between the Town of Montverde, FL and Close Construction Services, LLC for the Project.

NOW, THEREFORE BE IT RESOLVED BY THE TOWN COUNCIL OF THE TOWN OF MONTVERDE, FLORIDA, AS FOLLOWS:

Section 1. The above recitals are true and correct and are incorporated herein by reference.

Section 2. The Town Council awards a contract for the Project to Close Construction Services, LLC for the Project and approves the Conformed Agreement between the Town of Montverde, FL and Close Construction Services, LLC, a copy of which is attached hereto.

Section 3. The Town Council authorizes the town manager to execute the Conformed Agreement between the Town of Montverde, FL and Close Construction Services, LLC.

Section 4. This Resolution shall become effective immediately upon its passage and adoption.

PASSED AND RESOLVED this _____ day of December 2025 by the Town Council of the Town of Montverde, Florida.

Joe Wynkoop, Mayor

Attest:

Caroline Trepanier, Town Clerk

Approved as to form and legality:

Anita Geraci-Carver, Town Attorney

Council Member _____ moved the passage and adoption of the above and foregoing Resolution. Motion was seconded by Council Member _____ and upon roll call on the motion the vote was as follows:

	YEA	NAY
Allan Hartle, Councilmember		
Joe Morganelli, Councilmember		
Grant Roberts, Councilmember		
Carol Womack, Vice Mayor		
Joe Wynkoop, Mayor		

SECTION 00 52 10

CONFORMED AGREEMENT

THIS AGREEMENT is by and between Town of Montverde, FL (“Owner”) and Close Construction Services, LLC (“Contractor”). Owner and Contractor hereby agree as follows.

ARTICLE 1 – WORK

- 1.01 Contractor shall complete all Work as specified or indicated in the Contract Documents. The Work is generally described as Stormwater Improvements, which includes: clearing and grubbing, tree removal, full depth pavement reconstruction, roadway widening, driveway apron reconstruction, installation of curbing, installation of sidewalk, construction of stormwater Best Management Practices (BMP’s), revegetation; and all materials and equipment, construction, and services inherent to the Work.
- 1.02 The Work includes the principal features specified in Section 01 11 00 – Summary of Work.

ARTICLE 2 – THE PROJECT

- 2.01 The Project under the Contract Documents is generally known as “Stormwater Improvements – Phase 2 Porter Avenue”.

ARTICLE 3 – ENGINEER

- 3.01 The Project has been designed by Woodard & Curran, Inc. (Engineer), which is to act as Owner’s representative, assume all duties and responsibilities and have the rights and authority assigned to Engineer in the Contract Documents in connection with the completion of the Work in accordance with the Contract Documents.

ARTICLE 4 – CONTRACT TIMES

- 4.01 *Time of the Essence*
- A. All time limits for Milestones, if any, Substantial Completion, and completion and readiness for final payment as stated in the Contract Documents are of the essence of the Contract.
- 4.02 *Substantial Completion and Final Payment*
- A. The Work shall be substantially complete within 120 calendar days from the commencement of Contract Times as provided in Paragraph 2.03 of the Standard General and Supplementary Conditions and completed and ready for final payment, in accordance with Paragraph 14.07 of the Standard General Conditions, 150 calendar days from the commencement of Contract Times.

WOODARD & CURRAN

CONFORMED AGREEMENT
00 52 10-1

4.03 *Liquidated Damages*

- A. Contractor and Owner recognize that time is of the essence as stated in Paragraph 4.01 above and that Owner will suffer financial loss if the Work is not completed within the times specified in Paragraph 4.02 above, plus any extensions thereof allowed in accordance with Article 12 of the Standard General Conditions and Supplementary Conditions, if any. The parties also recognize the delays, expense, and difficulties involved in proving in a legal or arbitration proceeding the actual loss suffered by Owner if the Work is not completed on time. Accordingly, instead of requiring any such proof, Owner and Contractor agree that as liquidated damages for delay (but not as a penalty), Contractor shall pay Owner **\$500** for each day that expires after the time specified in Paragraph 4.02 above for Substantial Completion until the Work is substantially complete. After Substantial Completion, if Contractor shall neglect, refuse, or fail to complete the remaining Work within the Contract Time or any proper extension thereof granted by Owner, Contractor shall pay Owner **\$750** for each day that expires after the time specified in Paragraph 4.02 above for completion and readiness for final payment until the Work is completed and ready for final payment.

ARTICLE 5 – CONTRACT PRICE

- 5.01 Owner shall pay Contractor for completion of the Work in accordance with the Contract Documents an amount in current funds equal to the sum of the amounts determined pursuant to Paragraph 5.01.A below based on unit pricing stated in Contractor's Bid attached hereto:

TOTAL PRICE

Seven Hundred Ninety-Six Thousand Two Hundred	
Thirty-Five Dollars and Zero Cents	\$796,235.00

- A. Unit Prices have been computed in accordance with Paragraph 11.03.A of the Standard General Conditions and Supplementary Conditions, if any.
- B. The prices for Unit Price Work set forth as of the Effective Date of the Agreement are based on estimated quantities. As provided in Paragraph 11.03 of the Standard General Conditions and Supplementary Conditions, if any, estimated quantities are not guaranteed (except for those that may be estimated by the Contractor), and determinations of actual quantities and classifications are to be made by Engineer as provided in Paragraph 9.07 of the Standard General Conditions and Supplementary Conditions, if any. Final payment for unit price items will be based on actual quantities determined and based on the unit prices in the Unit Prices Form.
- C. When the accepted quantity of any item of Unit Price Work performed by the Contractor (as measured in accordance with 9.07 of the General and Supplementary Conditions, if any) differs from the estimated quantity indicated in the attachment(s) to this Agreement for an item of Unit Price Work, no adjustment or allowance will be made for any increased expenses, loss of expected reimbursement, or loss of anticipated profits suffered or claimed by the Contractor resulting either directly or indirectly from such increased or decreased quantities, or from unbalanced allocation of overhead expense among the Unit Price Work items on the part of the Contractor, or subsequent loss of expected reimbursements therefor.

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CONFORMED AGREEMENT
00 52 10-2

ARTICLE 6 – PAYMENT PROCEDURES

6.01 *Submittal and Processing of Payments*

- A. Contractor shall submit Applications for Payment in accordance with Article 14 of the Standard General Conditions and Supplementary Conditions, if any. Applications for Payment will be processed by Engineer as provided in the Standard General Conditions and Supplementary Conditions, if any, and the General Requirements.

6.02 *Progress Payments; Retainage*

- A. Owner shall make progress payments on account of the Contract Price on the basis of Contractor's Applications for Payment each month during performance of the Work as provided in Paragraph 6.02.A.1 below. All such payments will be measured by the schedule of values established as provided in Paragraph 2.07.A of the Standard General Conditions and Supplementary Conditions, if any, (and in the case of Unit Price Work based on the number of units completed).

- 1. Prior to Substantial Completion, progress payments will be made in an amount equal to the percentage indicated below but, in each case, less the aggregate of payments previously made and less such amounts as Engineer may determine or Owner may withhold, including but not limited to liquidated damages, in accordance with Paragraph 14.02 of the Standard General Conditions and Supplementary Conditions, if any, and additional retainage allowed by Laws and Regulations.

- a. 95 percent of Work completed (with the balance of 5 percent being retainage)
- b. 95 percent of cost of materials and equipment not incorporated in the Work (with the balance of 5 percent being retainage)
- c. After 50 percent completion of the Work, Owner shall reduce the amount to be withheld from each subsequent progress payment made to the Contractor 5 percent retainage, pursuant to Section 255.078, Florida Statutes.
- d. Owner shall not be obligated to pay or release any amounts that are the subject of a good faith dispute, the subject of a claim brought pursuant to a construction bond provided pursuant to this Contract, or otherwise the subject of a claim or demand by the Owner or Contractor.

- 2. Pursuant to Section 255.052 Florida Statutes, the Contractor may, from time to time,

3. withdraw the whole or any portion of the amount retained for payments to the Contractor pursuant to the terms of the Contract, upon depositing with the Owner's chief financial officer:

- United States Treasury bonds, United States Treasury notes, United States Treasury certificates of indebtedness, or United States Treasury bills;
- Bonds or notes of the state of Florida; or
- Bonds of any political subdivision in the state; or
- Cash delivered to the State Treasury for the Treasury Cash Deposit Trust Fund; or
- Certificates of deposit from state or national banks or state or federal savings and loan associations in the state. Certificates of deposit shall possess the eligibility characteristics defined in section 625.52 Florida Statutes.

B. Upon Substantial Completion of the entire construction to be provided under the Contract Documents, Owner shall pay an amount sufficient to increase total payments to Contractor to 98 percent of the Work completed, less such amounts set off by Owner pursuant to Paragraph 15.01.E of the General Conditions, and less Engineer's estimate of the value of Work to be completed or corrected as shown on the punch list of items to be completed or corrected prior to final payment.

1. Owner shall not be obligated to pay or release any amounts that are the subject of a good faith dispute, the subject of a claim brought pursuant to a construction bond provided pursuant to this Contract, or otherwise the subject of a claim or demand by the Owner or Contractor.

6.03 *Final Payment*

A. Upon final completion and acceptance of the Work in accordance with Paragraph 14.07 of the General and Supplementary Conditions, if any, Owner shall pay the remainder of the Contract Price as recommended by Engineer as provided in said Paragraph 14.07.

6.04 *Timely Payment*

A. Pursuant to the "Florida Prompt Payment Act", Section 255.073, Florida Statutes, when the Contractor receives payment from the Owner for labor, services, or materials furnished by Subcontractors and Suppliers hired by the Contractor, the Contractor shall remit payment due to those Subcontractors and Suppliers within 10 days after the Contractor's receipt of payment.

- B. When a Subcontractor receives payment from the Contractor for labor, services, or materials furnished by sub-subcontractors and sub-suppliers, the Subcontractor shall remit payment due to those sub-subcontractors and sub-suppliers within 7 days after the Subcontractor's receipt of payment.
- C. This provision does not prohibit a Contractor or Subcontractor from disputing, pursuant to the terms of the relevant contract, all or any portion of a payment alleged to be due to another party if the Contractor or Subcontractor notifies the party whose payment is disputed, in writing, of the amount in dispute and the actions required to cure the dispute.
- D. The Contractor or Subcontractor must pay all undisputed amounts due within the time limits imposed by this subsection.

ARTICLE 7 – INTEREST

- 7.01 All moneys not paid when due as provided in Article 14 of the General and Supplementary Conditions, if any, shall bear interest at the rate of 2 percent per month pursuant to Section 255.073, Florida Statutes.

ARTICLE 8 – CONTRACTOR'S REPRESENTATIONS AND CERTIFICATIONS

- 8.01 In order to induce Owner to enter into this Agreement, Contractor makes the following representations:
- A. Contractor has examined and carefully studied the Contract Documents and the other related data identified in the Bidding Documents.
 - B. Contractor has visited the Site and become familiar with and is satisfied as to the general, local, and Site conditions that may affect cost, progress, and performance of the Work.
 - C. Contractor is familiar with and is satisfied as to all federal, state, and local Laws and Regulations that may affect cost, progress, and performance of the Work.
 - D. Contractor has carefully studied all: (1) reports of explorations and tests of subsurface conditions at or contiguous to the Site and all drawings of physical conditions relating to existing surface or subsurface structures at the Site (except Underground Facilities), if any, that have been identified in Paragraph SC-4.02 of the Supplementary Conditions as containing reliable "technical data," and (2) reports and drawings of Hazardous Environmental Conditions, if any, at the Site that have been identified in Paragraph SC-4.06 of the Supplementary Conditions as containing reliable "technical data."

- E. Contractor has considered the information known to Contractor; information commonly known to contractors doing business in the locality of the Site; information and observations obtained from visits to the Site; the Contract Documents; and the Site-related reports and drawings identified in the Contract Documents, with respect to the effect of such information, observations, and documents on (1) the cost, progress, and performance of the Work; (2) the means, methods, techniques, sequences, and procedures of construction to be employed by Contractor, including any specific means, methods, techniques, sequences, and procedures of construction expressly required by the Contract Documents; and (3) Contractor's safety precautions and programs.
- F. Based on the information and observations referred to in Paragraph 8.01.E above, Contractor does not consider that further examinations, investigations, explorations, tests, studies, or data are necessary for the performance of the Work at the Contract Price, within the Contract Times, and in accordance with the other terms and conditions of the Contract Documents.
- G. Contractor is aware of the general nature of work to be performed by Owner and others at the Site that relates to the Work as indicated in the Contract Documents.
- H. Contractor has given Engineer written notice of all conflicts, errors, ambiguities, or discrepancies that Contractor has discovered in the Contract Documents, and the written resolution thereof by Engineer is acceptable to Contractor.
- I. The Contract Documents are generally sufficient to indicate and convey understanding of all terms and conditions for performance and furnishing of the Work.

8.02 The Contractor certifies, under the penalties of perjury, that:

- A. Contractor has not engaged in corrupt, fraudulent, collusive, or coercive practices in competing for or in executing the Contract. For the purposes of this Paragraph:
 - 1. "corrupt practice" means the offering, giving, receiving, or soliciting of anything of value likely to influence the action of a public official in the bidding process or in the Contract execution;
 - 2. "fraudulent practice" means an intentional misrepresentation of facts made (a) to influence the bidding process or the execution of the Contract to the detriment of Owner, (b) to establish Bid or Contract prices at artificial non-competitive levels, or (c) to deprive Owner of the benefits of free and open competition;
 - 3. "collusive practice" means a scheme or arrangement between two or more Bidders, with or without the knowledge of Owner, a purpose of which is to establish Bid prices at artificial, non-competitive levels; and
 - 4. "coercive practice" means harming or threatening to harm, directly or indirectly, persons or their property to influence their participation in the bidding process or affect the execution of the Contract.

8.03 *Statutory*

- A. In accordance with Section 119.0701, Florida Statutes, Contractor agrees to comply with Florida's Public Records Law, including the following.
1. Keep and maintain public records required by the Owner to perform the services under this Agreement.
 2. Upon request by the Owner, provide the Owner with copies of the requested records, having redacted records in total on in part that are exempt from disclosure by law or allow the records to be inspected or copied within a reasonable time (with provision of a copy of such records to the Owner) on the same terms and conditions that the Owner would provide the records and at a cost that does not exceed that provided in Chapter 119, Florida Statutes, or as otherwise provided by Law.
 3. Ensure that records, in part or in total, that are exempt or that are confidential and exempt from disclosure requirements are not disclosed except as authorized by law for the duration of the Agreement term and following completion (or earlier termination) of the Agreement if Contractor does not transfer the records to the Owner;
 4. Upon completion (or earlier termination) of the Agreement, Contractor shall within 30 days after such event either transfer to the Owner, at no cost, all public records in possession of the Contractor or keep and maintain the public records in compliance with Chapter 119, Florida Statutes. If Contractor transfers all public records to the Owner upon completion (or earlier termination) of the Agreement, Contractor shall destroy any duplicate records that are exempt or confidential and exempt from public records disclosure requirements. If Contractor keeps and maintains public records upon completion (or earlier termination) of the Agreement, Contractor shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to the Owner in a format that is compatible with the information technology systems of the Owner.
 5. The failure of Contractor to comply with Chapter 119, Florida Statutes, and/or the provisions set forth in this Article shall be grounds for immediate unilateral termination of the Agreement by the Owner. The Owner shall also have the option to withhold compensation due Contractor until records are received as provided herein.

6. IF THE CONTRACTOR HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE CONTRACTOR'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS AGREEMENT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT:

**Paul Larino, Town Manager
Town of Montverde, Florida
17404 Sixth Street
P.O. Box 560008
Montverde, Florida, 34756
407-469-2681**

- B. Contractor has certified that it has not been placed on the convicted vendor list pursuant to Section 287.133, Florida Statutes.
- C. Contractor has certified that it has not been placed on the discriminatory vendor list pursuant to Section 287.134, Florida Statutes.
- D. Contractor has certified it is not in violation of Section 287.135, Florida Statutes, and it is not on either the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, created pursuant to Section 215.473, Florida Statutes, or it is not on the Scrutinized Companies that Boycott Israel List, created pursuant to Section 215.4725, Florida Statutes, (effective October 1, 2016) or it is not engaged in a boycott of Israel (effective October 1, 2016) or it is not engaged in business operations in Cuba or Syria.
- E. Contractor has certified that it has not been placed on the antitrust violator vendor list pursuant to Section 287.137, Florida Statutes.
- F. Contractor has certified it does not use coercion for labor or services as defined in Florida Statute 787.06.
- G. Contractor certifies that all trench excavation within its control and by its Subcontractors shall be conducted in strict adherence with the Florida Trench Safety Act pursuant to Chapter 553 § 60-64 Florida Statutes.

- 8.04 Contractor agrees to comply with applicable Federal requirements set forth in the Supplementary Conditions Section 00 73 74 including the following.
- A. Minority businesses, women's business enterprises, and labor surplus per 2 CFR Part 200 Subpart D §200.321.
 - 1. The Contractor shall carry out applicable requirements of 40 CFR Part 33.
 - B. Domestic preference for procurement per 2 CFR Part 200 Subpart D §200.322.
 - 1. Build America, Buy America (BABA) Act
 - C. Procurement of recovered materials per 2 CFR Part 200 Subpart D §200.323
 - D. Access to records per 2 CFR Part 200 Subpart D §200.337.
 - E. Prohibition on certain telecommunications and video surveillance services or equipment 2 CFR Part 200 Subpart D §200.216
 - F. Per Appendix II to Part 200 - Contract Provisions for Non-Federal Entity Contracts Under Federal Awards
 - 1. Equal Employment Opportunity requirements per 41 CFR 60 and in accordance with Executive Order 11246, "Equal Employment Opportunity"
 - 2. Contract Work Hours and Safety Standards Act (40 U.S.C. 3701-3708)
 - 3. Davis-Bacon Act, Federal minimum wage rates and Copeland Anti-KickBack Act (40 USC 3145). In case of discrepancy between Federal and state wage rates, the higher wage rates shall apply. See Section 00 73 43.
 - 4. Clean Air Act (42 U.S.C. 7401-7671q.) and the Federal Water Pollution Control Act (33 U.S.C. 1251-1387), as amended
 - 5. Debarment and Suspension (Executive Orders 12549 and 12689)
 - 6. Byrd Anti-Lobbying Amendment (31 U.S.C. 1352)
 - G. Contractor agrees to incorporate these requirements into all subcontracts regardless of tier and Purchase Orders so that such provisions will be binding upon each Subcontractor or Supplier. The Contractor shall maintain reasonable records to demonstrate compliance with these requirements.
- 8.05 The representations and certifications Contractor submitted with its Bid shall remain valid during the period of this Agreement.
- 8.06 Contractor agrees to incorporate the applicable provisions of the Contract Documents into all subcontracts and Purchase Orders so that such provisions will be binding upon each Subcontractor or Supplier.

ARTICLE 9 – CONTRACT DOCUMENTS

9.01 *Contents*

A. The Contract Documents consist of the following:

1. This Agreement and attachments
 - Bid Form (submitted by Close Construction Services, LLC and dated October 21, 2025)
 - Bid Supplements and attachments
 - Public Construction Bond
 - Insurance certificates
2. Forms listed in 00 60 00
3. Standard General Conditions in Section 00 72 05
4. Supplementary Conditions as listed in Section 00 01 10, Table of Contents
5. General Requirements and Specifications as listed in Section 00 01 10, Table of Contents
6. Drawings as listed in Section 00 01 15, List of Drawing Sheets
7. The following which may be delivered or issued on or after the Effective Date of the Agreement and are not attached hereto:
 - a. Notice to Proceed
 - b. Work Change Directives
 - c. Change Orders

B. The documents listed in Paragraph 9.01.A are attached to this Agreement and made a part hereof.

C. There are no Contract Documents other than those listed above in this Article 9.

D. The Contract Documents may only be amended, modified, or supplemented as provided in Paragraph 3.04 of the Standard General Conditions and Supplementary Conditions, if any.

ARTICLE 10 – MISCELLANEOUS

10.01 *Terms*

A. Terms used in this Agreement will have the meanings stated in the Standard General Conditions and Supplementary Conditions, if any.

10.02 *Assignment of Contract*

- A. No assignment by a party hereto of any rights under or interests in the Contract will be binding on another party hereto without the written consent of the party sought to be bound; and, specifically but without limitation, moneys that may become due and moneys that are due may not be assigned without such consent (except to the extent that the effect of this restriction may be limited by law), and unless specifically stated to the contrary in any written consent to an assignment, no assignment will release or discharge the assignor from any duty or responsibility under the Contract Documents.

10.03 *Successors and Assigns*

- A. Owner and Contractor each binds itself, its partners, successors, assigns, and legal representatives to the other party hereto, its partners, successors, assigns, and legal representatives in respect to all covenants, agreements, and obligations contained in the Contract Documents.

10.04 *Severability*

- A. Any provision or part of the Contract Documents held to be void or unenforceable under any Law or Regulation shall be deemed stricken, and all remaining provisions shall continue to be valid and binding upon Owner and Contractor, who agree that the Contract Documents shall be reformed to replace such stricken provision or part thereof with a valid and enforceable provision that comes as close as possible to expressing the intention of the stricken provision.

10.05 *Third Party Beneficiaries*

- A. Neither Contractor nor Owner intends to directly or substantially benefit a third party by this Agreement. Therefore, the Parties acknowledge that there are no third-party beneficiaries to this Agreement and that no third party is or will be entitled to assert a right or claim against either of them based upon this Agreement.

10.06 *Prohibition on Gratuities and Kickbacks*

- A. It is unethical for any person to offer, give, or agree to give any employee or for any employee to solicit, demand, accept or agree to accept from another person, a gratuity or an offer of employment in connection with any decision, approval, disapproval, recommendation, preparation of any part of program requirement or a purchase request, influencing the content of any specification or procurement standard, rendering of advice, investigation, audit, or in any other advisory capacity in any proceeding or application, request for ruling, determination claim or controversy, or other particular matter, pertaining to any program requirement or an Agreement or subcontract or to any solicitation of proposal therefore.
- B. It shall be unethical for any payment, gratuity, or offer of employment to be made by or on behalf of a Subcontractor under a Contract to Contractor or higher tier Subcontractor any person associated therewith, as an inducement of the award of a subcontract or order.

SIGNATURES APPEAR ON THE FOLLOWING PAGE

WOODARD & CURRAN

CONFORMED AGREEMENT

00 52 10-11

IN WITNESS WHEREOF, Owner and Contractor have signed this Agreement. Counterparts have been delivered to Owner and Contractor. All portions of the Contract Documents have been signed or have been identified by Owner and Contractor or on their behalf.

This Agreement will be effective on _____ (which is the Effective Date of the Agreement).

OWNER:
Town of Montverde, FL

CONTRACTOR:
Close Construction Services, LLC

By: _____
Paul Larino, Town Manager

By: _____
Thomas J. Close, Vice President

License No. _____

Attest: _____

Attest: _____

Title

Title

Address for giving notices:

Address for giving notices:

Agent for service of process:

(If Owner is a corporation, attach evidence of authority to sign. If Owner is a public body, attach evidence of authority to sign and resolution or other documents authorizing execution of this Agreement.)

(If Contractor is a corporation, a partnership, or a joint venture, attach evidence of authority to sign.)

END OF SECTION

WOODARD & CURRAN

CONFORMED AGREEMENT
00 52 10-12

1511 N Westshore Boulevard
Suite 420
Tampa, Florida 33607
www.woodardcurran.com

T 800.426.4262



Via Electronic Mail

November 20, 2025

Paul Larino, PE, Town Manager
Town of Montverde, FL
17404 6th St,
Montverde, FL 34756
Email: townmanager@mymontverde.com

RE: Review of Bids
Montverde Stormwater Improvements – Phase 2 Porter Avenue

Dear Mr. Larino:

Woodard & Curran, Inc. (Woodard & Curran) has reviewed the Bids received for the Montverde Stormwater Improvements – Phase 2 Porter Avenue (the Project). Bids were opened on October 21, 2025 at 3:00 PM in the conference room at 17404 Sixth Street, Montverde, Florida.

Five Bids were received for the Project as listed below.

1. Close Construction Services, LLC – Florida; **\$796,235.50**
2. Blackwater Construction Services, LLC – Florida; **\$917,588.00**
3. Traverse Group, Inc. – Florida; **\$1,109,137.50**
4. CPWG Constructors, LLC – Florida; **\$1,124,714.51**
5. CCC Cathcart Construction Company Florida, LLC – Florida; **\$1,379,887.00**

Bids were checked for completeness as well as arithmetic errors and were found to be complete, and no arithmetic errors were discovered. Bids were accompanied by the required Bid Bond, complete reference list, required Bidder certifications, as well as other required documents. Reference checks were conducted for Close Construction Services only and were generally favorable.

Based on our review, Close Construction Services, LLC from Florida appears to be the lowest responsive and responsible Bidder with a Bid of **\$796,235.50**.

A Tabulation of the Bids received, Bid Package submitted by Close Construction Services, and Contractor Reference Checks are included in Attachment Nos. 1, 2 and 3 respectively.



Please review the information provided herein and let us know of the Town's decision on award of this Project at your earliest convenience.

If the Town intends to award a contract to Close Construction Services, LLC, please let us know and we will prepare and forward the required Notice of Intent to Award and begin preparation of the conformed contract.

Sincerely,

WOODARD & CURRAN, INC.

A handwritten signature in black ink, appearing to read "Stefan", written over a horizontal line.

Stefan Oliver Thoenes, PE
Senior Project Manager

Attachments: Attachment 1: Tabulation of Bids
 Attachment 2: Close Construction Services, LLC Bid Package
 Attachment 3: Contractor Reference Checks

ATTACHMENT 1: TABULATION OF BIDS





BID TABULATION
Stormwater Improvements
Design Phase 2 Porter Avenue
ITB # 2025-02
October 21, 2025

<u>Bidder</u>	<u>Rank</u>	<u>Total Bid Price</u>
CPWG Constructors, LLC	4	\$ 1,124,714.51
CCC Cathcart Construction Company Florida, LLC	5	\$ 1,379,887.00
Blackwater Construction Services, LLC	2	\$ 917,588.00
Traverse Group, Inc.	3	\$ 1,109,137.50
Close Construction Services, LLC.	1	\$ 796,235.50

ATTACHMENT 2: BID SUBMITTAL



SECTION 00 41 01

BID FORM

ORIGINAL

ARTICLE 1 – DEFINED TERMS

- 1.01 The terms used in this Bid with initial capital letters have the meanings stated in the Instructions to Bidders, the General Conditions and Supplementary Conditions, if any.

ARTICLE 2 – BID RECIPIENT

- 2.01 This Bid is submitted to:

**Town of Montverde
Town Hall
17404 Sixth Street, P.O. Box 56008
Montverde, FL 34756
Attention: Paul Larino, Town Manager**

- 2.02 The undersigned Bidder proposes and agrees, if this Bid is accepted, to enter into an Agreement with Owner in the form included in the Bidding Documents to perform all Work as specified or indicated in the Bidding Documents for the prices and within the times indicated in this Bid and in accordance with the other terms and conditions of the Bidding Documents.

ARTICLE 3 – BIDDER'S ACKNOWLEDGEMENTS

- 3.01 Bidder accepts all of the terms and conditions of the Bidding Documents including, without limitation:
- A. those dealing with disposition of Bid security;
 - B. those included in the Supplementary Instructions to Bidders;
 - C. insurance and bonding requirements (Payment Bond and Performance Bond each equal to 100% of the total Contract Price) set forth in the General Conditions and Supplementary Conditions, if any;
 - D. Contract Times as set forth in the Agreement; and
 - E. provisions for liquidated damages as set forth in the Agreement.
- 3.02 This Bid will remain subject to acceptance for 120 days after the Bid opening or for such longer period of time that Bidder may agree to in writing upon request of Owner.

<u>Addendum No.</u>	<u>Addendum Date</u>
1	10.10.2025

ARTICLE 4 – BASIS OF BID

BID PRICES SHALL INCLUDE SALES AND USE TAX.

two hundred thirty-five

_____ Dollars and Zero Cents \$ 796,235.00
(Use words) (Use figures)

4.03 Bidder acknowledges that estimated quantities are not guaranteed, and are solely for the purpose of comparison of Bids, and final payment for unit price items will be based on actual quantities determined and based on the unit prices included above, as provided in the General Conditions and Supplementary Conditions, if any.

ARTICLE 5 – TIME OF COMPLETION

- 5.01 Bidder agrees that the Work will be substantially complete and will be completed and ready for final payment in accordance with Paragraph 14.07 of the General Conditions and Supplementary Conditions, if any, on or before the dates or within the number of calendar days indicated in the Agreement.
- 5.02 Bidder accepts the provisions of the Agreement as to liquidated damages.

ARTICLE 6 – ATTACHMENTS TO THIS BID

- 6.02 The following documents are fully completed, submitted with and made a part of and a condition of this Bid.

☐ 00 43 13 Bid Bond

OR

☐ Required Bid security in the form of _____

Supplements

- ☐ 00 43 22 Unit Prices Form
- ☐ 00 43 40 Information, Schedules and Data **including required documents and submittals specified**
- ☐ 00 45 05 Bidder's Representations and Certifications **including required documents and submittals specified**
- ☐ 00 45 13 Bidder's Qualifications
- ☐ 00 45 19 Non-collusion Affidavit

ARTICLE 7 – COMMUNICATIONS WITH BIDDER

7.01 Communications concerning this Bid shall be addressed to:

Name	<u>Thomas J. Close</u>
Title	<u>Vice President</u>
Business Address	<u>305 NW 4th Ave., Okeechobee, FL 34972</u>
	<u></u>
Telephone No.	<u>863.467.0831</u>
Email address	<u>ccs@closeconstructionllc.com</u>

ARTICLE 8 – Bid Submittal

SUBMITTED ON: October 21, 2025
EIN/FEIN: Redacted

8.01 This Bid is submitted by:

A Corporation

Corporation Name:

State of incorporation:

Type:

(General Business, Professional, Service, other)

By:

(Signature – attach evidence of authority to sign)

Name *(typed or printed)*:

Title:

(CORPORATE SEAL)

Attest:

(Signature of Corporate Secretary)

Business Address:

Phone Nos:

Email address:

Date of qualification to do business as out-of-state corporation:

0233076.08

Issue Date: September 2025

Stormwater Improvements – Phase 2 Porter Avenue
Montverde, FL

A Limited Liability Company (LLC)

LLC Name: Close Construction Services, LLC

State in which organized: Florida

By: 
(Signature – attach evidence of authority to sign)

Name (typed or printed): Thomas J. Close

Title: Vice President

Business Address: 305 NW 4th Ave., Okeechobee, FL 34972

Phone Nos: 863.467.0831

Email address: ccs@closeconstructionllc.com

WOODARD & CURRAN

BID FORM
00 41 01-6

0233076.08
Issue Date: September 2025

Stormwater Improvements – Phase 2 Porter Avenue
Montverde, FL

A Joint Venture

First Joint Venturer Name:

By:

N/A
(Signature – attach evidence of authority to sign)

Name (typed or printed):

Title:

Business Address:

Phone Nos:

Email address:

Second Joint Venturer Name:

By:

NA
(Signature – attach evidence of authority to sign)

Name (typed or printed):

Title:

Business Address:

Phone Nos:

Email address:

(Each Joint Venturer must sign. The manner of signing for each individual, partnership, corporation and limited liability company that is a party to the joint venture should be in the manner indicated above.)

WOODARD & CURRAN

BID FORM
00 41 01-7

0233076.08
Issue Date: September 2025

Stormwater Improvements – Phase 2 Porter Avenue
Montverde, FL

A Partnership

Partnership Name:

N/A

(SEAL)

By:

(Signature of general partner – attach evidence of authority to sign)

Name *(typed or printed)*:

Title:

Business Address:

Phone Nos:

Email address:

Individual

Name *(typed or printed)*:

N/A

By:

(Individual signature)

Doing Business as:

Business Address:

Phone Nos:

Email address:

END OF SECTION

WOODARD & CURRAN

BID FORM
00 41 01-8

BID BOND

Any singular reference to Bidder, Surety, Owner or other party shall be considered plural where applicable.

BIDDER (Name and Address):

Close Construction Services, LLC
305 Northwest 4th Avenue
Okeechobee, FL 34972

SURETY (Name and Address of Principal Place of Business):

Great American Insurance Company
301 East Fourth Street
Cincinnati, OH 45202

OWNER (Name and Address):

City of Montverde
17404 6th Street
Montverde, FL 34756

BID

Bid Due Date: October 21, 2025

Description (Project Name and Include Location): Stormwater Improvements Phase 2- Porter Ave, Bid No. 0233076.80
Montverde, FL

BOND

Bond Number: Bid Bond

Date (Not earlier than Bid due date): October 21, 2025

Penal sum Five Percent of Amount Bid

(Words)

\$ 5%

(Figures)

Surety and Bidder, intending to be legally bound hereby, subject to the terms set forth below, do each cause this Bid Bond to be duly executed by an authorized officer, agent, or representative.

BIDDER

Close Construction Services, LLC

Bidder's Name

By:

Signature

Thomas J. Close

Print Name

Vice President

Title

Attest:

Signature

Corp Secretary

Title

SURETY

Great American Insurance Company

Surety's Name and Corporate Seal

By:

Signature (Attach Power of Attorney)

Matthew Smith

Print Name

Attorney-In-Fact

Title

Attest:

Signature Cathy Phan

Sr. Account Manager

Title



Note: Above addresses are to be used for giving any required notice. Provide execution by any additional parties, such as joint venturers, if necessary.

PENAL SUM FORM

Form C-00 43 13

1. Bidder and Surety, jointly and severally, bind themselves, their heirs, executors, administrators, successors, and assigns to pay to Owner upon default of Bidder the penal sum set forth on the face of this Bond. Payment of the penal sum is the extent of Bidder's and Surety's liability. Recovery of such penal sum under the terms of this Bond shall be Owner's sole and exclusive remedy upon default of Bidder.
2. Default of Bidder shall occur upon the failure of Bidder to deliver within the time required by the Bidding Documents (or any extension thereof agreed to in writing by Owner) the executed Agreement required by the Bidding Documents and any performance and payment bonds required by the Bidding Documents.
3. This obligation shall be null and void if:
 - 3.1 Owner accepts Bidder's Bid and Bidder delivers within the time required by the Bidding Documents (or any extension thereof agreed to in writing by Owner) the executed Agreement required by the Bidding Documents and any performance and payment bonds required by the Bidding Documents, or
 - 3.2 All Bids are rejected by Owner, or
 - 3.3 Owner fails to issue a Notice of Award to Bidder within the time specified in the Bidding Documents (or any extension thereof agreed to in writing by Bidder and, if applicable, consented to by Surety when required by Paragraph 5 hereof).
4. Payment under this Bond will be due and payable upon default of Bidder and within 30 calendar days after receipt by Bidder and Surety of written notice of default from Owner, which notice will be given with reasonable promptness, identifying this Bond and the Project and including a statement of the amount due.
5. Surety waives notice of any and all defenses based on or arising out of any time extension to issue Notice of Award agreed to in writing by Owner and Bidder, provided that the total time for issuing Notice of Award including extensions shall not in the aggregate exceed 120 days from Bid due date without Surety's written consent.
6. No suit or action shall be commenced under this Bond prior to 30 calendar days after the notice of default required in Paragraph 4 above is received by Bidder and Surety and in no case later than one year after Bid due date.
7. Any suit or action under this Bond shall be commenced only in a court of competent jurisdiction located in the state in which the Project is located.
8. Notices required hereunder shall be in writing and sent to Bidder and Surety at their respective addresses shown on the face of this Bond. Such notices may be sent by personal delivery, commercial courier, or by United States Registered or Certified Mail, return receipt requested, postage pre-paid, and shall be deemed to be effective upon receipt by the party concerned.
9. Surety shall cause to be attached to this Bond a current and effective Power of Attorney evidencing the authority of the officer, agent, or representative who executed this Bond on behalf of Surety to execute, seal, and deliver such Bond and bind the Surety thereby.
10. This Bond is intended to conform to all applicable statutory requirements. Any applicable requirement of any applicable statute that has been omitted from this Bond shall be deemed to be included herein as if set forth at length. If any provision of this Bond conflicts with any applicable statute, then the provision of said statute shall govern and the remainder of this Bond that is not in conflict therewith shall continue in full force and effect.
11. The term "Bid" as used herein includes a Bid, offer, or proposal as applicable.

GREAT AMERICAN INSURANCE COMPANY®

Administrative Office: 301 E 4TH STREET • CINCINNATI, OHIO 45202 • 513-369-5000 • FAX 513-723-2740

The number of persons authorized by
this power of attorney is not more than TWO

No. 0 22567

POWER OF ATTORNEY

KNOW ALL MEN BY THESE PRESENTS: That the GREAT AMERICAN INSURANCE COMPANY, a corporation organized and existing under and by virtue of the laws of the State of Ohio, does hereby nominate, constitute and appoint the person or persons named below, each individually if more than one is named, its true and lawful attorney-in-fact, for it and in its name, place and stead to execute on behalf of the said Company, as surety, any and all bonds, undertakings and contracts of suretyship, or other written obligations in the nature thereof; provided that the liability of the said Company on any such bond, undertaking or contract of suretyship executed under this authority shall not exceed the limit stated below.

Name	Address	Limit of Power
MATTHEW T SMITH	BOTH OF	BOTH
CATHY PHAN	ST. PETERSBURG, FLORIDA	\$100,000,000

This Power of Attorney revokes all previous powers issued on behalf of the attorney(s)-in-fact named above.

IN WITNESS WHEREOF the GREAT AMERICAN INSURANCE COMPANY has caused these presents to be signed and attested by its appropriate officers and its corporate seal hereunto affixed this 29TH day of OCTOBER, 2024

GREAT AMERICAN INSURANCE COMPANY



Assistant Secretary

Matthew T. Smith

Divisional Senior Vice President

John Webster

STATE OF OHIO, COUNTY OF HAMILTON - ss:

JOHN WEBSTER (877-377-2405)

On this 29TH day of OCTOBER, 2024, before me personally appeared JOHN WEBSTER, to me known, being duly sworn, deposes and says that he resides in Cincinnati, Ohio, that he is a Divisional Senior Vice President of the Bond Division of Great American Insurance Company, the Company described in and which executed the above instrument; that he knows the seal of the said Company; that the seal affixed to the said instrument is such corporate seal; that it was so affixed by authority of his office under the By-Laws of said Company, and that he signed his name thereto by legal authority.



SUSAN A KOHORST
Notary Public
State of Ohio
My Comm. Expires
May 18, 2025

Susan A Kohorst

This Power of Attorney is granted by authority of the following resolutions adopted by the Board of Directors of Great American Insurance Company by unanimous written consent dated June 9, 2008.

RESOLVED: That the Divisional President, the several Divisional Senior Vice Presidents, Divisional Vice Presidents and Divisional Assistant Vice Presidents, or any one of them, be and hereby is authorized, from time to time, to appoint one or more Attorneys-in-Fact to execute on behalf of the Company, as surety, any and all bonds, undertakings and contracts of suretyship, or other written obligations in the nature thereof; to prescribe their respective duties and the respective limits of their authority; and to revoke any such appointment at any time.

RESOLVED FURTHER: That the Company seal and the signature of any of the aforesaid officers and any Secretary or Assistant Secretary of the Company may be affixed by facsimile to any power of attorney or certificate of either given for the execution of any bond, undertaking, contract of suretyship, or other written obligation in the nature thereof, such signature and seal when so used being hereby adopted by the Company as the original signature of such officer and the original seal of the Company, to be valid and binding upon the Company with the same force and effect as though manually affixed.

CERTIFICATION

I, STEPHEN C. BERAHA, Assistant Secretary of Great American Insurance Company, do hereby certify that the foregoing Power of Attorney and the Resolutions of the Board of Directors of June 9, 2008 have not been revoked and are now in full force and effect.

Signed and sealed this 21st day of October, 2025



Assistant Secretary

Stephen C. Beraha

BID PRICES SHALL EXCLUDE SALES AND USE TAX.

Item No.	Item Description with Unit or Lump Sum Price	Estimated Quantity	Unit	Unit Bid Price	Total Bid Item Price
1	Mobilization/Demobilization (not to exceed 5%)	1	LUMP SUM	37,000.00	37,000.00
2	Erosion and Sedimentation Controls	1	LUMP SUM	15,000.00	15,000.00
3	Clear & Grub	1	LUMP SUM	9,250.00	9,250.00
4	Remove and Dispose Bituminous and Cement Concrete Pavement	4,070	SQUARE YARD	7.00	28,490.00
5	Remove and Dispose Tree	5	EACH	1,000.00	5,000.00
6	Remove and Relocate Mailbox	1	EACH	500.00	500.00
7	Remove and Relocate Water Valves	3	EACH	3,500.00	10,500.00
8	Type B Stabilization, Imported Materials or Blend of On-Site and Imported Material, 12 inches Thick	4,590	SQUARE YARD	11.50	52,785.00
9	Base Group 04, Lime rock or Recycled Crushed Concrete, 6 inches Thick	4,590	SQUARE YARD	10.00	45,900.00
10	Superpave Asphaltic Concrete, Traffic C, 2 inches Thick	516	TON	262.00	135,192.00
11	Cement Concrete Sidewalk and Driveways, 4 inches Thick	554	SQUARE YARD	109.00	60,386.00
12	Pavement Markings	1	LUMP SUM	22,000.00	22,000.00
13	Concrete Ribbon Curb, 8-inch	3,372	LINEAR FOOT	41.00	138,252.00

Item No.	Item Description with Unit or Lump Sum Price	Estimated Quantity	Unit	Unit Bid Price	Total Bid Item Price
14	Stormwater Best Management Practices	1	LUMP SUM	17,500.00	17,500.00
15A	15-inch Class III Reinforced Concrete Pipe	619	LINEAR FEET	116.00	71,804.00
15B	18-inch Class III Reinforced Concrete Pipe	166	LINEAR FEET	127.00	21,082.00
15C	24-inch Class III Reinforced Concrete Pipe	47	LINEAR FEET	252.00	11,844.00
16	FDOT Drainage Manhole	3	EACH	8,000.00	24,000.00
17	FDOT Ditch Bottom Inlet Type C	9	EACH	6,250.00	56,250.00
18	Earthwork and Fine Grading	1	LUMP SUM	21,000.00	21,000.00
19	Soil Amendments and Sodding	1	LUMP SUM	12,500.00	12,500.00

TOTAL BID PRICE (based on Unit Price Schedule above)

Seven hundred ninety-six thousand
two hundred thirty-five

Dollars and

Zero

Cents

\$ 796,235.00

(Use words)

(Use figures)

INCLUDE TOTAL BID PRICE (based on Unit Price Schedule above) ON BID FORM

END OF SECTION

SECTION 00 43 40

INFORMATION, SCHEDULES AND DATA

Bidder has submitted the following items with its Bid.

☐ **SCHEDULE**

Provide a proposed Project Schedule based on a Notice to Proceed on approximately November 20, 2025, a Substantial Completion within 120 days, and final completion within 150 days. The schedule shall be presented in sufficient detail for the Owner to evaluate the Bidder's ability to perform the Work within the Contract Times and shall include:

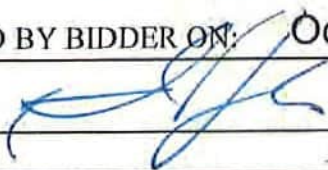
- milestones related to submittal schedules & material/equipment procurement/order placement;
- milestones related to construction and checkout & functional testing; and
- sequencing to limit impacts from construction.

☐ **WORK PLAN**

Submit a narrative work plan describing the Bidder's approach to the successful execution of the Work to accommodate the proposed Project Schedule and provide for special requirements. Allow for review of submittals, coordination, and development of detailed construction sequencing and coordination, and compliance with special requirements.

Describe:

- how schedule progress will be measured and tracked;
- how the Schedule of Values and cash flow will be determined and how progress for payment will be determined; and
- how documents will be controlled to ensure the appropriate revision is used in design, procurement, and construction/installation.

CERTIFIED BY BIDDER ON:	October 21, 2025
By:	
	Authorized person

END OF SECTION

SECTION 00 45 05

BIDDER'S REPRESENTATIONS AND CERTIFICATIONS

The undersigned, under the penalties of perjury, represents and certifies the following which is made a condition of the Bid.

1.01 BIDDER'S REPRESENTATIONS

- A. Bidder has examined and carefully studied the Bidding Documents and other related data identified in the Bidding Documents.
- B. Bidder has visited the Site and become familiar with and is satisfied as to the general, local, and Site conditions that may affect cost, progress, and performance of the Work.
- C. Bidder is familiar with and is satisfied as to all Laws and Regulations that may affect cost, progress, and performance of the Work.
- D. Bidder has carefully studied all: (1) reports of explorations and tests of subsurface conditions at or contiguous to the Site and all drawings of physical conditions relating to existing surface or subsurface structures at the Site (except Underground Facilities) that have been identified in Section 00 73 10 of the Supplementary Conditions Paragraph 4.02 as containing reliable "technical data," and (2) reports and drawings of Hazardous Environmental Conditions, if any, at the Site that have been identified in Section 00 73 10 of the Supplementary Conditions Paragraph 4.06 as containing reliable "technical data."
- E. Bidder has considered the information known to Bidder; information and observations obtained from visits to the Site; the Bidding Documents; and the Site-related reports and drawings identified in the Bidding Documents, with respect to the effect of such information, observations, and documents on (1) the cost, progress, and performance of the Work; (2) the means, methods, techniques, sequences, and procedures of construction to be employed by Bidder, including applying the specific means, methods, techniques, sequences, and procedures of construction expressly required by the Bidding Documents; and (3) Bidder's safety precautions and programs.
- F. Based on the information and observations referred to in Paragraph E above, Bidder does not consider that further examinations, investigations, explorations, tests, studies, or data are necessary for the determination of the Bid for performance of the Work at the price(s) bid and within the times required, and in accordance with the other terms and conditions of the Bidding Documents.

- G. Bidder is aware of the general nature of work to be performed by Owner and others at the Site that relates to the Work as indicated in the Bidding Documents.
- H. Bidder has given Engineer written notice of all conflicts, errors, ambiguities, or discrepancies that Bidder has discovered in the Bidding Documents, and the written resolution thereof by Engineer is acceptable to Bidder.
- I. The Bidding Documents are generally sufficient to indicate and convey understanding of all terms and conditions for the performance of the Work for which the Bid is submitted.

1.02 BIDDER'S CERTIFICATIONS

- A. The Bid is genuine and not made in the interest of or on behalf of any undisclosed individual or entity and is not submitted in conformity with any collusive agreement or rules of any group, association, organization, or corporation.
- B. Bidder has not directly or indirectly induced or solicited any other Bidder to submit a false or sham Bid and has not solicited or induced any individual or entity to refrain from bidding.
- C. Bidder has not engaged in corrupt, fraudulent, collusive, or coercive practices in competing for the Contract. For the purposes of this Paragraph:
 - 1. "corrupt practice" means the offering, giving, receiving, or soliciting of anything of value likely to influence the action of a public official in the bidding process;
 - 2. "fraudulent practice" means an intentional misrepresentation of facts made (a) to influence the bidding process to the detriment of Owner, (b) to establish Bid prices at artificial non-competitive levels, or (c) to deprive Owner of the benefits of free and open competition;
 - 3. "collusive practice" means a scheme or arrangement between two or more Bidders, with or without the knowledge of Owner, a purpose of which is to establish Bid prices at artificial, non-competitive levels; and
 - 4. "coercive practice" means harming or threatening to harm, directly or indirectly, persons or their property to influence their participation in the bidding process or affect the execution of the Contract.
- D. Bidder will comply with the requirements of the Contract Documents, and if Bidder is awarded a Contract, agrees to incorporate applicable provisions into all subcontracts and Purchase Orders so that such provisions will be binding upon each Subcontractor or Supplier, including as a minimum, Statutory Requirements, safety and health regulations; and Wage Rate Requirements.

1.03 STATUTORY CERTIFICATIONS

- A. Bidder has not been found guilty by a court of any violation of federal labor or employment tax laws regarding subjects such as safety, tax withholding, workers' compensation, reemployment assistance or unemployment tax, social security and Medicare tax, wage or hour, or prevailing rate laws within the past 5 years pursuant to Section 255.20 Florida Statutes, and is therefore, eligible to Bid pursuant to Section 255.20 Florida Statutes.
- B. Bidder has implemented a drug-free workplace program. ☐ Yes ☐ No
- C. Bidder has not been placed on the convicted vendor list, has submitted the Affidavit on Public Entity Crimes included as an attachment to this Section, and therefore is eligible to Bid pursuant to Section 287.133, Florida Statutes.
- D. Bidder has not been placed on the discriminatory vendor list, and therefore is eligible to Bid pursuant to Section 287.134, Florida Statutes.
- E. If the Bid is \$1,000,000 or more, Bidder is not on either the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, created pursuant to Section 215.473, Florida Statutes, and is not on the Scrutinized Companies that Boycott Israel List, created pursuant to Section 215.4725, Florida Statutes, (effective October 1, 2016) or is not engaged in a boycott of Israel (effective October 1, 2016) or is not engaged in business operations in Cuba or Syria, and is therefore is eligible to Bid, pursuant to Section 287.135, Florida Statutes.
- F. Bidder has not been placed on the antitrust violator vendor list, and therefore is eligible to Bid pursuant to Section 287.137, Florida Statutes.
- G. Pursuant to Florida HB 7063, Bidder certifies it does not use coercion for labor or services as defined in Florida Statute 787.06 and has submitted the attached affidavit with its Bid.
- H. Pursuant to Chapter 112 Florida Statutes, Bidder has disclosed with their Bid the name of any officer, director, agent, or shareholder who is also an employee of the Owner and the name of any employee of the Owner who owns, directly or indirectly, an interest of 5 percent or more in the Bidder's firm or any of its branches.

- I. By submission of its Bid and subsequent execution of this Contract, the Bidder certifies that all trench excavation within its control, and in the control of its Subcontractors, shall be conducted in strict adherence with the Florida Trench Safety Act. Bidder certifies that costs for complying with the Florida Trench Safety Act are included in the various items of the Bid and in the Total Bid Price.
1. Costs for compliance with the Florida Trench Safety Act to be identified with the Bid include the following, with trench to be excavated in linear feet and special shoring requirements, if any, in square feet.

Trench Safety Measure (Description)	Units of Measure (LF, SY)	Unit (QTY)	Unit Cost Extended	Total Cost
Trench Box	LF	10	500.00	5,000.00

- J. If awarded a Contract, Bidder agrees to utilize the U.S. Department of Homeland Security's E-Verify Systems to verify the employment eligibility of all persons employed during the term of the Contract.


1.04 BIDDER'S CERTIFICATIONS REQUIRED BY GRANTS

- A. Bidder will comply with requirements for use of *minority businesses, women's business enterprises, and labor surplus* per 2 CFR Part 200 Subpart D §200.321 and will take affirmative steps to assure firms are used when possible.
1. If Bidder is the awarded Contractor, it shall not discriminate on the basis of race, color, national origin, or sex in the performance of any resulting Contract and shall carry out applicable requirements of 40 CFR Part 33.

- B. Bidder will provide *preference for the purchase, acquisition, or use of goods, products, or materials produced in the United States* (including but not limited to iron, aluminum, steel, cement, and other manufactured products) per 2 CFR Part 200 Subpart D §200.322 and will comply with 2 CFR Part 200 Subpart D §200.323, *Procurement of recovered materials*, as applicable, which covers compliance with section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act.
2. Bidder will comply with *Build America, Buy America (BABA) Act* requiring steel, iron, manufactured products, non-ferrous metals, plastic and polymer-based products (including polyvinylchloride, composite building materials, and polymers used in fiber optic cables), glass (including optic glass), lumber, and drywall to be produced in the United States.
- C. Bidder will provide *access to records* by Federal government representatives per 2 CFR Part 200 Subpart D §200.337.
- D. Bidder will comply with requirements for *prohibition on certain telecommunications and video surveillance services or equipment* per 2 CFR Part 200 Subpart D §200.216.
- E. Bidder will comply with the requirements for *equal employment opportunity* per 41 CFR 60 and in accordance with Executive Order 11246 and has submitted the attached "Certificate of Non-Segregated Facilities" with its Bid.
- F. Bidder will comply with the requirements of the *Contract Work Hours and Safety Standards Act* (40 U.S.C. 3701-3708), the *Davis-Bacon Act*, *Federal minimum wage rates* and *Copeland Anti-KickBack Act* (40 USC 3145).
- G. Bidder will comply with the *Clean Air Act* (42 U.S.C. 7401-7671q.) and the *Federal Water Pollution Control Act* (33 U.S.C. 1251-1387), as amended
- H. Bidder is not presently debarred, suspended, proposed for disbarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal department or agency or from receiving a contract with Federal financial assistance (see <https://www.dol.gov/agencies/ofccp/debarred-list>) and certifies it does not appear on the System for Award Management (SAM) at as a debarred entity (<https://sam.gov/content/home>).
- I. Bidder has disclosed its lobbying activities and submitted the attached "Certification for Contracts, Grants, and Loans" (no lobbying) OR "Standard Form LLL Disclosure of Lobbying Activities" (if applicable) with its Bid.

ATTACHMENTS

- A. Affidavit on Public Entity Crimes
- B. Human Trafficking Affidavit
- C. Certificate of Non-Segregated Facilities
- D. Certification for Contracts, Grants, and Loans (no lobbying) OR
- E. Standard Form LLL Disclosure of Lobbying Activities (if applicable)

SUBMITTED ON:	October 21, 2025
By:	
Authorized person per Bid Form	

END OF SECTION

AFFIDAVIT ON PUBLIC ENTITY CRIMES

(SWORN STATEMENT PURSUANT TO SECTION 287.133(3)(a), FLORIDA STATUTES)

THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS.

1. This sworn statement is submitted to Town of Montverde
by Thomas J. Close, Vice President
(Print individual's name and title)
for Close Construction Services, LLC
(Print name of entity submitting sworn statement)
whose business address is 305 NW 4th Ave., Okeechobee, FL 34972

and (if applicable) its Federal Employer Identification Number (FEIN) is
Redacted the entity has no FEIN, include the Social Security Number of
the individual signing this sworn
statement: _____).

2. I understand that a "public entity crime" as defined in Paragraph 287.133(1)(g), Florida Statutes, means a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity or with an agency or political subdivision of any other state or of the United States, including, but not limited to, any bid or contract for goods or services to be provided to any public entity or an agency or political subdivision of any other state or of the United States and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation.
3. I understand that "convicted" or "conviction" as defined in Paragraph 287.133(1)(b), Florida Statutes, means a finding of guilt or a conviction of a public entity crime, with or without an adjudication of guilt, in any federal or state trial court of record relating to charges brought by indictment or information after July 1, 1989, as a result of a jury verdict, nonjury trial, or entry of a plea of guilty or nolo contendere.
4. I understand that an "affiliate" as defined in Paragraph 287.133(1)(a), Florida Statutes, means:
- a. A predecessor or successor of a person convicted of a public entity crime; or
 - b. An entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime. The term "affiliate" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the management of an affiliate. The

ownership by one person of shares constituting a controlling interest in another person, or a pooling of equipment or income among persons when not for fair market value under an arm's length agreement, shall be a prima facie case that one person controls another person. A person who knowingly enters into a joint venture with a person who has been convicted of a public entity crime in Florida during the preceding 36 months shall be considered an affiliate.

5. I understand that a "person" as defined in Paragraph 287.133(1)(e), Florida Statutes, means any natural person or entity organized under the laws of any state or of the United States with the legal power to enter into a binding contract and which bids or applies to bid on contracts for the provision of goods or services let by a public entity, or which otherwise transacts or applies to transact business with a public entity. The term "person" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of an entity.
6. Based on information and belief, the statement which I have marked below is true in relation to the entity submitting this sworn statement. **(Indicate which statement applies)**

☒ Neither the entity submitting this sworn statement, nor any of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, nor any affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989.

☐ The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989.

☐ The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989. However, there has been a subsequent proceeding before a Hearing Officer of the State of Florida, Division of Administrative Hearings and the Final Order entered by the Hearing Officer determined that it was not in the public interest to place the entity submitting this sworn statement on the convicted vendor list. **(Attach a copy of the final order)**

I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CONTRACTING OFFICER FOR THE PUBLIC ENTITY IDENTIFIED IN PARAGRAPH 1 (ONE) ABOVE IS FOR THAT PUBLIC ENTITY ONLY AND, THAT THIS FORM IS VALID THROUGH DECEMBER 31 OF THE CALENDAR YEAR IN WHICH IT IS FILED. I ALSO UNDERSTAND THAT I AM REQUIRED TO INFORM THE PUBLIC ENTITY PRIOR TO ENTERING INTO A CONTRACT IN EXCESS OF THE THRESHOLD AMOUNT PROVIDED IN SECTION

287.017, FLORIDA STATUTES FOR CATEGORY TWO OF ANY CHANGE IN THE INFORMATION CONTAINED IN THIS FORM.

[Signature]
(Signature)

10.21.2025

(Date)

STATE OF Florida

COUNTY OF Okeechobee

PERSONALLY APPEARED BEFORE ME, the undersigned authority,
Thomas J. Close who, after first being

(Name of individual signing

sworn by me, affixed his/her signature in the space provided above on this
21 day of October, ~~2016~~
2025

Attest:

[Signature]
Notary Public

My commission expires: _____

(Notary Seal)



HUMAN TRAFFICKING AFFIDAVIT

1. I am over the age of 18 and I have personal knowledge of the matters set forth except as otherwise set forth herein.
2. I currently serve as Vice President (Role) of Close Construction Services, LLC (Company).
3. Close Construction Services, LLC (Company) does not use coercion for labor or services, as those terms are defined in Florida Statute 787.06.
4. This declaration is made pursuant to Florida Statute 92.525. I understand that making a false statement in this declaration may subject me to criminal penalties.

Under penalties of perjury, I, Thomas J. Close, declare that I have read the foregoing Human Trafficking Affidavit and that the facts stated in it are true.

Further Affiant sayeth naught.

Close Construction Services, LLC

Company Name



Authorized Signatory

Thomas J. Close

Printed Name

Vice President

Title

10.21.2025

Date

CERTIFICATE OF NON-SEGREGATED FACILITIES

We, Close Construction Services, LLC (Company)
certify that we do not and will not maintain or provide for our employees any segregated facilities at any of our establishments, and that we do not and will not permit our employees to perform their services at any location, under our control, where segregated facilities are maintained. We understand and agree that breach of this certification is a violation of Equal Opportunity clause required by Executive Order 11246, amended.

As used in this certification, the term "segregated facilities" means any waiting rooms, work areas, rest rooms and wash rooms, restaurants and other eating areas, time clocks, locker rooms and other storage or dressing areas, parking lots, drinking fountains, recreation or entertainment areas, transportation and housing facilities provided for employees which are segregated by explicit directive or are in fact segregated on the basis of race, creed, color, or national origin, because of habit, local custom or otherwise.

We further agree that (except where we have obtained identical certifications from proposed Subcontractors for specific time periods) we will obtain identical certifications from proposed Subcontractors prior to the award of subcontracts exceeding \$10,000 which are not exempt from the provisions of the Equal Opportunity clause; that we will retain such certification in our files; and that we will forward the following notice to such proposed Subcontractors (except where the proposed Subcontractors have submitted identical certifications for specific time periods).

NOTICE TO PROSPECTIVE SUBCONTRACTORS OF REQUIREMENT FOR CERTIFICATION OF NON-SEGREGATED FACILITIES. A certification of Non-segregated facilities as required by the 9 May 1967 order on Elimination of Segregated Facilities, by the Secretary of Labor (32 Fed. Reg. 7439, 19 May 1967), must be submitted from the provisions either for each subcontract or for all subcontracts during a period (i.e. quarterly, semi-annually, or annually).

NOTE: Whoever knowingly and willfully makes any false, fictitious or fraudulent representation may be liable to criminal prosecution under 18 U.S.C. 1001.

Close Construction Services, LLC

(Name of Company)

By: _____



Date: 10.21.2025

Title: Vice President

CERTIFICATION FOR CONTRACTS, GRANTS AND LOANS

The undersigned certifies, to the best of his or her knowledge and belief, that:

1. No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant or Federal loan, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant or loan.

2. If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant or loan, the undersigned shall complete and submit Standard Form - LLL, "Disclosure of Lobbying Activities," in accordance with its instructions.

3. The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including contracts, subcontracts, and subgrants under grants and loans) and that all subrecipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.



Thomas J. Close

(name)

10.21.2025

(date)

Vice President

(title)

oOo

DISCLOSURE OF LOBBYING ACTIVITIES

Complete this form to disclose lobbying activities pursuant to 31 U.S.C. 1352
(See Reverse for public burden disclosure.)

1. Type of Federal Action: <input type="checkbox"/> a. contract <input type="checkbox"/> b. grant <input type="checkbox"/> c. cooperative agreement <input type="checkbox"/> d. loan <input type="checkbox"/> e. loan guarantee <input type="checkbox"/> f. loan insurance	2. Status of Federal Action: <input type="checkbox"/> a. bid/offer/application <input type="checkbox"/> b. initial award <input type="checkbox"/> c. post-award	3. Report Type: <input type="checkbox"/> a. initial filing <input type="checkbox"/> b. material change For Material Change Only: year _____ quarter _____ date of last report _____
4. Name and Address of Reporting Entity: <input type="checkbox"/> Prime <input type="checkbox"/> Subawardee Tier _____, <i>if known:</i> Congressional District, <i>if known:</i>		5. If Reporting Entity in No. 4 is a Subawardee, Enter Name and Address of Prime: Congressional District, <i>if known:</i>
6. Federal Department/Agency:	7. Federal Program Name/Description: CFDA Number, <i>if applicable:</i>	
8. Federal Action Number, <i>if known:</i>	9. Award Amount, <i>if known:</i> \$	
10. a. Name and Address of Lobbying Registrant <i>(If individual, last name, first name, MI):</i>	b. Individuals Performing Services <i>(Including address if different from No. 10a)</i> <i>(last name, first name, MI):</i>	
11. Information requested through this form is authorized by title 31 U.S.C. section 1352. This disclosure of lobbying activities is a material representation of fact upon which reliance was placed by the tier above when this transaction was made or entered into. This disclosure is required pursuant to 31 U.S.C. 1352. This information will be reported to the Congress semi-annually and will be available for public inspection. Any person who fails to file the required disclosure shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.	Signature: _____ Print Name: _____ Title: _____ Telephone No.: _____ Date: _____	
Federal Use Only:		Authorized for Local Reproduction Standard Form LLL (Rev. 7-97)

Close Construction Services, LLC does not participate in lobbying activities.

INSTRUCTIONS FOR COMPLETION OF SF-LLL, DISCLOSURE OF LOBBYING ACTIVITIES

This disclosure form shall be completed by the reporting entity, whether subawardee or prime Federal recipient, at the initiation or receipt of a covered Federal action, or a material change to a previous filing pursuant to title 31 U.S.C. section 1352. The filing of a form is required for each payment or agreement to make payment to any lobbying entity for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with a covered Federal action. Complete all items that apply for both the initial filing and material change report. Refer to the implementing guidance published by the Office of Management and Budget for additional information.

1. Identify the type of covered Federal action for which lobbying activity is and/or has been secured to influence the outcome of a covered Federal action.
2. Identify the status of the covered Federal action.
3. Identify the appropriate classification of this report. If this a followup report caused by a material change to the information previously reported, enter the year and quarter in which the change occurred, Enter the date of the last previously submitted report by this reporting entity for this covered Federal action.
4. Enter the full name, address, city, State and zip code of the reporting entity. Include Congressional District, if known. Check the appropriate classification of the reporting entity that designates if it is, or expects to be a prime or subaward receipt. Identify the tier of the subawardee, e.g., the first subawardee of the prime is the 1st tier. Subawards include but are not limited to subcontracts, subgrants and contract awards under grants.
5. If the organization filing the report in item 4 checks "Subawardee," then enter the full name, address, city, State and zip code of the prime Federal recipient. Include Congressional District, if known.
6. Enter the name of the Federal agency making the award or loan commitment. Include at least one organizational level below agency name, if known. For example, Department of Transportation, United States Coast Guard.
7. Enter the Federal program name or description for the covered Federal action (Item 1). If known, enter the full Catalog of Federal Domestic Assistance (CFDA) number for grants, cooperative agreements, loans and loan commitments.
8. Enter the most appropriate Federal identifying number available for the Federal action identified in Item 1 (e.g., Request for Proposal (RFP) number; Invitation for bid (IFB) number; grant announcement number; the contract, grant, or loan award number; the application/proposal control number assigned by the Federal agency). Include prefixes, e.g. "RFP-DE-90-001."
9. For a covered Federal action where there has been an award or loan commitment by the Federal agency, enter the Federal amount of the award/loan commitment for the prime entity identified in Item 4 or 5.
10. (a) Enter the full name, address, city, State and zip code of the lobbying registrant under the Lobbying Disclosure Act of 1995 engaged by the reporting entity identified in Item 4 to influence the covered Federal action.

(b) Enter the full names of the individual(s) performing services, and include full address if different from 10 (a). Enter Last Name, First Name and Middle Initial (MI).
11. Certifying official shall sign and date the form, print his/her name, title and telephone number.

According to the Paperwork Reduction Act, as amended, no persons are required to respond to a collection of information unless it displays a valid OMB Control Number. The valid OMB control number for this information collection is OMB No. 0348-0046. Public reporting burden for this collection of information is estimated to average 10 minutes per response, including time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding the burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the Office of Management and Budget, Paperwork Reduction Project (0348-0046), Washington, DC 20503.

Close Construction Services, LLC does not participate in lobbying activities.

SECTION 00 45 13

BIDDER'S QUALIFICATIONS

The following data, statements of experience, personnel, equipment and general qualifications are submitted as a part of the Bid and the Bidder represents and guarantees the truthfulness and accuracy thereof and **its ability to meet the qualifications requirements specified in Section 01 43 05 and the Specifications**. Attach additional sheets as necessary properly cross referenced.

1.01 GENERAL

- A. Bidder's organization is a Limited Liability Company
(entity type) and has been in business continuously from the year
7 yeras _____.
- B. Bidder has operated under the same business name and organization structure for the
last 5 years on at least 5 projects ☒ yes ☐ no
- If no, indicate other business names: _____
- C. Bidder's organization has had experience in construction comparable to that required
by the Contract Documents as a prime contractor for 7 years and as a
subcontractor for 0 years.

1.02 BIDDER EXPERIENCE

- A. Identify at least 5 projects in the state the Project is located completed within the past 5 years which are similar in type, character, physical size, and complexity to that required by the Contract Documents.

Client/Owner Name/Address	Project Name/Location	CURRENT Contact Name, Phone, Email	Contract Value	Time Period
Palm Beach County School District 3300 Forest Hill Blvd., West Palm Beach, FL 33406	Everglades Elementary School - Additional Parking West Palm Beach, FL	Tate Yulga, 651.301.9260, Tate.Yulga@aecom.com	\$246,571.00	June 2024 to April 2025
City of Winter Haven 500 3rd St. Winter haven, FL 33881	Raingarden & Stormwater Project Winter Haven, FL	Devon Moore, Office: 863.291.5881 Cell: 8633557.4526 dmoore@mywinterhaven.com	\$673,340.28	February 2024 to August 2024
City of Lake Worth Beach 7 North Dixie Hwy Lake Worth Beach, FL 33460	South Palm Park Sea Mitifation - Stormwater Pump Lake Worth Beach, FL	Steve Fowler, Office: 561.575.2005 Cell:" 561.203.4353 stephen.fowler@hoztz consulting.com	\$1,097,282.00	September 2023 to November 2024
Palm Beach County School District 3300 Forest Hill Blvd., West Palm Beach, FL 33406	Forest Hill High School - Parking Lot West Palm Beach, FL	Patrick Narcisse 954.663.2777 Patrick.narcisse@palmbeachschools.org	\$812,000.00	March 2025 to October 2025
City of Haines City 620 E. Main Street Haines City, FL 33844	Haines City Rain Garden & Installation Services Haines City, FL	Woodley Pierre Office: 863.421.3777 Cell: 863.206.4360 Woodley.Pierre@hainescity.com	\$585,000.00	March 2025 to October 2025

1.03 SPECIALTY EXPERIENCE OF BIDDER OR SUBCONTRACTORS

- A. Identify at least 5 projects that included a combination of stormwater, potable water, and pavement/street repair within public streets within the last 10 years

Client/Owner Name/Address	Project Name/Location	CURRENT Contact Name, Phone, Email	Bidder or Subcontractor (Name)	Time Period
Palm Beach County School District 3300 Forest Hill Blvd., West Palm Beach, FL 33406	Everglades Elementary School - Additional Parking West Palm Beach, FL	Tate Yulga, 651.301.9260 Tate.Yulga@aecom.com	\$246,571.00	June 2024 to April 2025
City of Winter Haven 500 3rd St. Winter Haven, FL 33881	Raingarden & Stormwater Project Winter Haven, FL	Devon Moore, Office: 863.291.5881 Cell: 863.3557.4526 dmoores@mywinterhaven.com	\$673,340.28	February 2024 to August 2024
City of Lake Worth Beach 7 North Dixie Hwy Lake Worth Beach, FL 33460	South Palm Park Sea Mitigation - Stormwater Pump Lake Worth Beach, FL	Steve Fowler, Office: 561.575.2005 Cell: 561.203.4353 stephen.fowler@hoztz consulting.com	\$1,097,282.00	September 2023 to November 2024
Palm Beach County School District 3300 Forest Hill Blvd., West Palm Beach, FL 33406	Forest Hill High School - Parking Lot West Palm Beach, FL	Patrick Narcisse 954.663.2777 Patrick.narcisse@ palmbeachschools.org	\$812,000.00	March 2025 to October 2025
City of Haines City 620 E. Main Street Haines City, FL 33844	Haines City Rain Garden & Installation Services Haines City, FL	Woodley Pierre Office: 863.421.3777 Cell: 863.206.4360 Woodley.Pierre@ hainescity.com	\$585,000.00	March 2025 to October 2025

B. Identify at least 5 projects that included pavement and street repair within public streets within the last 10 years.

Client/Owner Name/Address	Project Name/Location	CURRENT Contact Name, Phone, Email	Bidder or Subcontractor (Name)	Time Period
Palm Beach County School District 3300 Forest Hill Blvd., West Palm Beach, FL 33406	Everglades Elementary School - Additional Parking West Palm Beach, FL	Tate Yulga, 651.301.9260, Tate.Yulga@aecom.com	\$246,571.00	June 2024 to April 2025
City of Winter Heaven 500 3rd St. Winter haven, FL 33881	Raingarden & Stormwater Project Winter Haven, FL	Devon Moore, Office: 863.291.5881 Cell: 8633557.4526 dmoore@mywinterhavem.com	\$673,340.28	February 2024 to August 2024
City of Lake Worth Beach 7 North Dixie Hwy Lake Worth Beach, FL 33460	South Palm Park Sea Mitigation - Stormwater Pump Lake Worth Beach, FL	Steve Fowler, Office: 561.575.2005 Cell: 561.203.4353 stephen.fowler@hoztz consulting.com	\$1,097,282.00	September 2023 to November 2024
Palm Beach County School District 3300 Forest Hill Blvd., West Palm Beach, FL 33406	Forest Hill High School - Parking Lot West Palm Beach, F	Patrick Narcisse 954.663.2777 Patrick.narcisse@ palmbeachschools.org	\$812,000.00	March 2025 to October 2025
City of Haines City 620 E. Main Street Haines City, FL 33844	Haines City Rain Garden & Installation Services Haines City, FL	Woodley Pierre Office: 863.421.3777 Cell: 863.206.4360 Woodley.Pierre@ hainescity.com	\$585,000.00	March 2025 to October 2025

1.04 CURRENT LICENSES

A. Indicate Bidder and Subcontractor(s) current licenses including design professionals and surveyors.

Name	State	Type	License number
Thomas C. Close	Florida	General Contractor	CGC1526474

1.05 PERSONNEL

- A. Identify supervisory personnel that are currently employed by the Bidder and available for assignment to the Project (project manager, superintendents, principal foremen and engineers).
1. Identify full-time on-Site superintendent in responsible charge of the Work with at least 10 years' experience as superintendent on comparable projects.
 2. Identify project manager assigned full-time with at least 10 years' experience as project manager on comparable projects.

Name	Title	Years of Experience
Donald 'Donny' Cooper	Full time, on-Site Superintendent	35 + Years
Thomas C. Close	Full time Project Manager assigned	35 + Years

- B. Attach detailed resumes of qualifications, previous employers and experience for each supervisory staff listed above.

1.06 PROPOSED DESIGN PROFESSIONALS AND SURVEYORS

- A. The following design professionals and surveyors are to be employed or retained by the Bidder and available for assignment to the Project.

Name	Address	Area of Responsibility	Years of Experience
Johnston Surveying, LLC	900 Cross Prairie Pkwy	Survey	105 years
	Kissimmee, FL 34744		

- B. Attach detailed resumes of qualifications, previous employers and experience for each design professional and surveyor listed above.

1.07 EMERGENCY RESPONSE CAPABILITIES

- A. Describe Bidder's 24 hour/7 days per week emergency response and communication capabilities. Attach additional documentation, as necessary.

[illegible]

1.08 EQUIPMENT

- A. Identify equipment available for use on the Project. Indicate whether owned by Bidder's organization or rented. Attach additional sheets, as necessary.

Type of Equipment	Size or Capacity	Owned or Rented
2004 Kubota Mini Excavator		Owned
2007 Bobcat T250 Skid Loader		Owned
2000 John Deere 444 Loader		Owned
2021 John Deere 50G Compact Excavator		Owned
2021 John Deere 325G Compact Track Loader		Owned

1.09 BUSINESS INTERESTS

- A. Identify the names and addresses of the members of the Board of Directors of corporation, or the names and addresses of all persons and parties interested in this Bid as partners of a partnership or as individuals. Attach additional sheets, as necessary.

Name	Address	Telephone No.
Thomas C. Close, President	305 NW 4th Ave., Okeechobee, FL 34972	863.467.0831
Thomas J. Close, Vice President	305 NW 4th Ave., Okeechobee, FL 34972	863.467.0831
Melissa Boromei, Secretary	305 NW 4th Ave., Okeechobee, FL 34972	863.467.0831
Sheryl Wells, Treasurer	305 NW 4th Ave., Okeechobee, FL 34972	863.467.0831

- B. Identify the bank or banks representing the financial responsibility of the Bidder.

Name of Bank	Address	Contact Name and Telephone No.
South State Bank	2100 S. Parrot Ave. Okeechobee, FL 34942	Tabitha Trent, 863.763.5573

1.10 VIOLATIONS

- A. Following is a list of violations Bidder and its main Subcontractors have received or been the subject of, or otherwise been involved in, regarding any state or local ethic laws, regulation, code, ordinance, policy, or standard, or offenses arising out of submission of bids or the performance of work on public works projects or contracts over the last 10 years. Attach additional sheets, as necessary.

Name and Location of the Project	None
Nature of the Violation/Offense	
Duration and dates during which the violation/offense took place	

Name and Location of the Project	
Nature of the Violation/Offense	
Duration and dates during which the violation/offense took place	

Name and Location of the Project	
Nature of the Violation/Offense	
Duration and dates during which the violation/offense took place	

1.11 LABOR DISPUTES

- A. Identify labor disputes the Bidder has been the subject of, or otherwise been involved in, during the last 10 years. For these purposes, "labor disputes" shall include picketing or any other activity which disrupted or delayed the work. Attach additional sheets, as necessary.

Name and Location of the Project	None
Nature of the Dispute	
Duration and dates during which the dispute took place	
How the dispute was resolved	

Name and Location of the Project	
Nature of the Dispute	
Duration and dates during which the dispute took place	
How the dispute was resolved	

END OF SECTION

SECTION 00 45 19

NON-COLLUSION AFFIDAVIT

Thomas J. Close, being duly sworn,
depose and, under the penalty of perjury, say that the following is true:

1. I am the person responsible within my firm for the final decision as to the price(s) and amount of this Bid or, if not, that I have written authorization, enclosed herewith, from that person to make the statements set out below on his or her behalf and on the behalf of my firm.
2. The price(s) and amount of this Bid have been arrived at independently, without collusion, consultation, communication, or agreement for the purpose of restricting competition with any other contractor, competitor, Bidder, or potential Bidder.
3. Unless otherwise required by law, neither the price(s) nor the amount of this Bid have been disclosed to any other firm or person who is a Bidder, competitor, or potential Bidder on the Project, and will not be so disclosed either directly or indirectly prior to Bid opening.
4. No attempt has been made or will be made to solicit, cause, or induce any firm, partnership, corporation, or person to submit or not submit a Bid on this Project, or to submit a Bid higher than the Bid of this firm, or submit an intentionally high or noncompetitive Bid or other form of complementary Bid, or for the purpose of restricting competition.
5. The Bid of my firm is made in good faith and not pursuant to any agreement or discussion with, or inducement from, any firm or person to submit a complementary Bid.
6. My firm has not offered or entered into a subcontracting agreement regarding the purchase of materials or services from any firm or person, or offered, promised, or paid cash or anything of value to any firm or person, whether in connection with this or any other Project, in consideration for an agreement or promise by any firm or person to refrain from proposing or to submit a complementary Bid on the Project.
7. My firm has not accepted nor been promised any subcontract or agreement regarding the sale of materials or services to any firm or person, and has not been promised or paid cash or anything of value to any firm or person, whether in connection with this or any other project, in consideration for my firm's submitting a complementary Bid or agreeing to do so, on the Project.

8. I have made a diligent inquiry of all members, officers, employees, and agents of my firm with responsibilities relating to the preparation, approval, or submission of my firm's Bid on the Project and have been advised by each of them that he or she has not participated in any communication, consultation, discussion, agreement, collusion, act, or other conduct inconsistent with any of the statements and representations made in this affidavit.

Close Construction Services, LLC
Company Name


Signature

Vice President
Company Position

Date: 10.21.2025

Attest: 

Date: 10.21.2025

END OF SECTION

CORPORATE RESOLUTION

CLOSE CONSTRUCTION SERVICES , LLC.

RESOLUTION GRANTING SIGNING AND AUTHORITY TO CONDUCT BUSINESS

WHEREAS, CLOSE CONSTRUCTION SERVICES, LLC. desires to grant signing and authority to certain person(s) described hereunder.

RESOLVED, that the Board of Directors is hereby authorized and approved to grant signing and authority to conduct business to any one of the following person(s):

THOMAS C. CLOSE

THOMAS J. CLOSE

The foregoing signing and authority granted shall include, but shall not be limited to, the execution of Deeds, powers of attorney, transfers, assignments, contracts, obligations, certificates, and oilier instruments of whatever nature entered into by this company.

The undersigned hereby certifies that she is the duly elected and qualified Secretary and the custodian of the books and records and seal of CLOSE CONSTRUCTION SERVICES, LLC, a Limited Liability Company duly formed pursuant to the laws of the state of Florida and that the foregoing is a true record of a resolution duly adopted at a meeting of the Board of Directors and that said meeting was held in accordance with state law and the Bylaws of the above-named Limited Liability Company on July 24, 2025, and that said resolution is now in full force and effect Without modification or rescission.

IN WITNESS WHEREOF, I have executed my name as Secretary and have hereunto affixed the seal of the above-named Limited Liability Company this 24th day of July, 2025.



MELISSA A. BOROMEI, Secretary

CLOSE CONSTRUCTION SERVICES, LLC

305 NW 4th Avenue, Okeechobee, FL 34972

Phone: 863.467.0831

State License #CGC1526474

Construction Schedule

1. Preconstruction: permits, submittals, pre-con video, pre-con meeting, etc. – 30 days
2. Mobilize, utility locates, erosion control measures, MOT measures, proctors – 7 days
3. Demolition of existing asphalt, clearing and grubbing, tree and shrub removal – 8 days
4. Drainage installation – 14 days
 - a. Structures and culverts
5. Subgrade preparation – 14 days
 - a. Compaction, testing, and inspection
6. Base preparation – 14 days
 - a. Compaction, testing, and inspection
7. 1st Lift of asphalt restoration – 7 days
 - a. Prime coat and pave
8. Ribbon curbing, sidewalks, and driveways – 14 days
 - a. Excavation, form, inspect, pour, test cylinders
9. 2nd lift of asphalt restoration – 7 days
 - a. Tack coat and pave
10. Pavement markings – 14 days
11. BMP excavation and site grading – 14 days
 - a. Grading swales and fine grade ready for sod
12. Substantial Completion
13. Address punch list, as-builts, site/sod restoration, close-out process and docs– 30 days
14. Final Completion

Construction Methodology

Immediately after issuance of the Notice to Proceed, Close Construction Services (CCS) will initiate all preconstruction activities as required by the contract. These activities include conducting a comprehensive preconstruction conference with the Owner and Engineer, identifying and communicating any long-lead procurement items, developing a baseline schedule in Critical Path Method (CPM) format, and preparing and submitting a Schedule of Values (SOV) that aligns with scheduled milestones. CCS will also initiate all required submittal processes to ensure timely review and approval prior to material procurement or fabrication. Progress meetings will be held on a bi-weekly basis, beginning sixty (60) days after the preconstruction meeting. These meetings ensure transparent communication between all parties and to keep the project on track.

The project team will assess work completed against the SOV through direct field verification to confirm that billed milestones accurately reflect actual progress in the field. Progress payments will be submitted to the Owner and Engineer every thirty (30) days and will be accompanied by an updated schedule, photographic documentation of work in place, and any additional supporting data as required by the contract. Schedule progress will be measured and tracked

CLOSE CONSTRUCTION SERVICES, LLC

305 NW 4th Avenue, Okeechobee, FL 34972

Phone: 863.467.0831

State License #CGC1526474

against the approved Baseline Schedule, with updates reflecting percentage of completion, actual start and finish dates, and forecasted activity durations to maintain schedule accuracy.

All plan revisions, specifications, submittals, Requests for Information (RFIs), and change orders will be logged and tracked through CCS's document control system to ensure that only the latest approved revisions are distributed to the appropriate parties. This process will safeguard against the use of outdated drawings or specifications during design, procurement, and construction.

CCS will implement a comprehensive Quality Control Program to verify that all materials, workmanship, and installations conform to the contract plans, specifications, and applicable standards. Daily construction reports, weekly safety reports, and materials testing documentation will be maintained by CCS and submitted in accordance with contract requirements. Any items identified as deficient during inspections or testing will be corrected promptly and efficiently to maintain compliance and quality standards.

Upon substantial completion, CCS will coordinate a final walkthrough of the project site with the Owner and Engineer. During this inspection, a punch list will be generated identifying any outstanding or deficient work items. CCS will promptly address all punch list items and finalize project closeout by providing complete record drawings, releases, warranties, and all other required closeout documentation in accordance with the contract.



Ron DeSantis, Governor

Melanie S. Griffin, Secretary



STATE OF FLORIDA DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION

CONSTRUCTION INDUSTRY LICENSING BOARD

THE GENERAL CONTRACTOR HEREIN IS CERTIFIED UNDER THE
PROVISIONS OF CHAPTER 489, FLORIDA STATUTES

CLOSE, THOMAS CHRISTOPHER

CLOSE CONSTRUCTION SERVICES, LLC
305 NW 4TH AVENUE
OKEECHOBEE FL 34972

LICENSE NUMBER: CGC1526474

EXPIRATION DATE: AUGUST 31, 2026

Always verify licenses online at MyFloridaLicense.com

ISSUED: 06/04/2024

Do not alter this document in any form.

This is your license. It is unlawful for anyone other than the licensee to use this document.





CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

6/5/2025

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Pritchards And Associates 1802 S Parrott Avenue Okeechobee FL 34974	CONTACT NAME: Stevie White PHONE (A/C, No, Ext): 863-763-7711 E-MAIL ADDRESS: stevie@pritchardsinc.com FAX (A/C, No):
INSURED Close Construction Services, LLC PO BOX 2558 OKEECHOBEE FL 34973-2541	CLOSCON-01 INSURER(S) AFFORDING COVERAGE INSURER A: Southern Owners INSURER B: Auto-Owners Insurance Company#~ INSURER C: Florida Citrus Business & Industry for Work Comp INSURER D: Guldeone National Insurance Co INSURER E: INSURER F:
	NAIC # 10190 18988 31259 14167

COVERAGES**CERTIFICATE NUMBER:** 94715067**REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:	Y	Y	72637778	6/14/2025	6/14/2026	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 50,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000 \$
B	<input type="checkbox"/> AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> NON-OWNED AUTOS ONLY	Y	Y	4457286400	6/14/2025	6/14/2026	COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ 1,000,000 \$
	<input type="checkbox"/> UMBRELLA LIAB <input type="checkbox"/> EXCESS LIAB DED RETENTION \$						OCCUR CLAIMS-MADE EACH OCCURRENCE \$ AGGREGATE \$ \$
C	<input type="checkbox"/> WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y	N/A	10665448-2025	4/1/2025	4/1/2026	PER STATUTE OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
D	Pollution			ENV562012894-02	1/13/2025	1/13/2026	Aggregate Occurrence \$2,000,000 \$1,000,000

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

CERTIFICATE HOLDER**CANCELLATION**

For Informational Purposes Only

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

CLOSE

Construction Services, LLC
State License #CGC1526474

General Construction
Construction Management

Thomas Christopher "Chris" Close – President

Education

University of West Florida | Pensacola, FL
B.S. Building and Construction

Experience

- | | |
|---|---------------------|
| <ul style="list-style-type: none">- Close Construction Services Okeechobee, FL
G435 pump station Polk City, FL
<i>Project Manager. Construction of a pump station including all civil, structural, mechanical, HVAC, plumbing, electrical and instrumentation work. Project also included motor driven stormwater pumps, generator, and axial flow wall fans</i>- PC South Algal Nutrient Removal Facility Indian River County, FL
<i>Project Manager. Construction of a complex pollution removal facility consisting of a pump station, force main tie-in, site work, rip rap installation, drainage structures, culverts, concrete, and electric.</i>- South Palms Park Sea Level Rise Lake Worth Beach, FL
<i>Project Manager. Construction of a pump station in order to address chronic flood conditions at the end of a neighborhood road worsened by sea level rise. Project included paving, concrete, underground, wet well with pumps, electrical, and controls.</i>- Savannas Preserve Fort Pierce, FL
<i>Project manager. Renovation of the Savannas State Preserve Education Center sitework, including roof drain tie-in to nyloplast basins as part of a larger exfiltration system. Sealing and waterproofing of the crawlspace, along with trench drains, sumps, pumps, and conveyance. Work also includes complete carpentry package to address gables, floor framing, and decking.</i>- Laishley Park Playground Splashpad City of Punta Gorda, FL
<i>Project Manager. Construction associated with the expansion of a splash park in Punta Gorda. Project consisted of construction of new water features, concrete, electric, plumbing, controls and integration for facility operation.</i>- Bamboo Dorms Jupiter Island Club, FL
<i>Assist. Project Manager. Construction of a dormitory on Jupiter Island, consisting of demolitions of an existing facility, site work, drainage, paving, concrete, utilities, and new dormitory building complete with mechanical, electrical, plumbing, roofing, framing, precast concrete wall panels, and interior finish work.</i> | <p>1985-Present</p> |
|---|---------------------|
-

Job Assignments

- Provides strategic leadership, operational oversight, and overall direction to ensure financial, operational, and growth objectives are being met. Managing project management staff, high-level business operations, overseeing project execution, maintaining client relationships, and ensuring regulatory compliance, safety, and quality standards.
-

Licenses, Certifications, and Skills

Certified General Contractor– FL License #GCG1526474
35+ years of construction management



General Construction
Construction Management

Construction Services, LLC
State License #CGC1526474

Donald "Donny" Cooper – Senior Superintendent

Experience

- | | |
|--|--------------|
| Close Construction Services Okeechobee, FL | 2020-Present |
| <ul style="list-style-type: none">- Sportsman Park Maintenance and Storage City of Port St. Lucie, FL
<i>Superintendent. Construction of a new maintenance building, demolition of existing asphalt, fence storage area, new dumpster enclosure, asphalt repairs, grading, sod and irrigation repairs.</i>- Police Station and Maintenance Facility Hardening City of Fellsmere, FL
<i>Superintendent. Installation of shutters and impact resistant glass; strapping, clips and gable end reinforcement; sheathing, fastening, secondary water barrier and roof ventilation reinforcement.</i>- South Palms Park Sea Level Rise Mitigation City of Lake Worth Beach, FL
<i>Superintendent. Construction of a pump station in order to address chronic flood conditions at the end of a neighborhood road worsened by sea level rise. Project included paving, concrete, underground, wet well with pumps, electrical, and controls.</i>- Existing Bleacher Seating Repairs and Improvements Okeechobee County, FL
<i>Superintendent. Construction associated with repairing and upgrading existing bleachers and chain link fence work at the Agri-civic center in Okeechobee County.</i>- Laishley Park Playground Splashpad City of Punta Gorda, FL
<i>Superintendent. Construction associated with the expansion of a splash park in Punta Gorda. Project consisted of construction of new water features, concrete, electric, plumbing, controls and integration for facility operation.</i> | |

Job Assignments

- Review of project plans and specifications. Responsible for communication with project management team, municipal inspectors and staff, subcontractors and vendors. responsible for the daily project oversight including labor, material, scheduling, safety, completing daily logs, and conducting regular safety meetings and reports.
-

Licenses, Certifications, and Skills

Carpentry

35+ years of construction industry experience

FIRM INFORMATION

Johnston's Surveying, LLC (JS) is under the leadership of Richard D. Brown, as President, also being a registered Professional Surveyor and Mapper. The depth of our team is demonstrated by the tenure of our staff having a combined 296 years of experience serving Osceola County. We have dedicated our business reputation here in Osceola County and our accumulation of over 105 years of Osceola County survey data cannot be matched by any other firm.

JS, established in 1920, is the oldest surveying firm serving Osceola County. Our office is located at 900 Cross Prairie Parkway, Kissimmee, Florida, between Kissimmee and St. Cloud at the intersection of Highway 192 and the Florida Turnpike, just minutes from any survey project. All work is performed from our 900 Cross Prairie Parkway office.

Serving Osceola County, Kissimmee and St. Cloud with quality surveying support, **JS** provides a broad range of land surveying services to private-sector and government clients, keeping us well informed on the growth of the County and in many cases providing our clients available resources regarding adjoining survey data.

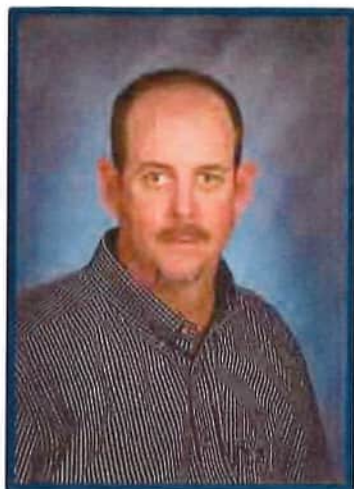
At present, **JS** has a staff of twenty-six (26) employees, with twenty-two (22) employees being Osceola County residents. **JS** has five (5) Professional Surveyors and Mappers, all possessing an extensive knowledge of information relative to surveying conditions in Osceola County. All surveys, calculations, and mapping oversight are performed by licensed Professional Surveyors. Our technical staff has a combined tenure with **JS** of 176 years of dedicated surveying service to Osceola County. This longevity is a sign of the dedication to serve our clients with commitment and teamwork.

RELEVANT QUALIFICATIONS

Johnston's Surveying, LLC's team has the experience to provide surveying services for boundary and topographic surveys, utility mapping, legal descriptions for easements, utility route surveys, subsurface utility engineering, and other surveying related surveys.

CLIENT RELATIONSHIP

Johnston's Surveying, LLC has supported Toho Water Authority since its inception and is committed to continue to provide high quality, timely and cost-effective surveying for all current and future projects.



**Principal
Professional Land Surveyor
Project Manager**

Availability: 60%

Registrations:

Florida Professional Surveyor and
Mapper #5700 (Registered 1997)

Education:

Indian River Community College

Professional Affiliations:

Florida Surveying and
Mapping Society
American Congress on
Surveying & Mapping

RICHARD D. BROWN, P.S.M.

Mr. Brown has over 37 years of surveying experience, of which 28 has been in Osceola County. He has been with **JS** for over 11 years. Rick's extensive surveying experience including field, office, and project management provided the foundation for his current position of President. Rick coordinates all field operations, office cad personnel, client relations, and project management. Rick reviews and oversees preparation of all surveys such as boundary, topographical, aerial, construction controls, condominium platting, subdivision plats, right-of-way acquisition, engineering design and as-builts.

PROJECT EXPERIENCE:

TWA Cypress Lake WTP & Well Sites
Bronson Ranch Survey
TWA - Lake Cypress Road Route Survey
Southport Park
Southport Park – Boggy Creek Airboat Rides
Osceola County Landfill, Southport Road
South Lake Toho Ranch Survey, Southport Road
Poinciana Blvd Phase 3 Route Survey
Pleasant Hill Road Route Survey
TWA Reservoir at Neo-City/Judge Farm Lands
TWA Judge Lands Force Main Route
TWA LS 57 Force Main at South Bermuda Plant
TWA South Bermuda WWTP & WPCF
TWA Bay Lake Estates Water Main
TWA LS 48 Michigan Ave Force Main
TWA Walnut Street Force Main
TWA Poinciana Water Main Extensions
TWA Hwy 192 / Celebration Blvd Water Main Extension
TWA Narcoossee Rd – Boggy Creek Rd Water Main
TWA Imperial Pump Station at ChampionsGate
TWA Boggy Creek Elementary School Sidewalk Improvement
TWA Shingle Creek Intake Station
TWA Poinciana Blvd Water Main
TWA Lakeside Drive Force Main Extension
TWA Osceola Parkway Force Main Replacement
TWA Sanitary Sewer Repairs
TWA Intercession City Water Plant

Emergency Action Plan

Purpose:

To establish the policy and procedures regarding management's and employee's response to various emergency situations. Examples of an emergency are fire, tornado, earthquake, and bomb threat.

Overview:

The procedures cover the following topics:

- I. Fire Reporting and Procedure**
- II. Evacuation**
- III. Tornado Preparation and Emergency**
- IV. Bomb Threat**
- V. First Aid**
- VI. Hazardous Material Spill**
- VII. Earthquake VIII. Robbery IX. Hurricane:**
 - A. Office**
 - B. Jobsite**

Policy:

Close Construction Services, LLC has developed plans that address emergency situations that may arise in Close Construction Services, LLC locations and which may threaten human health and safety, and damages Close Construction Services, LLC assets. Management is responsible for implementing the Emergency Action Plans. These Emergency Action Plans will meet the following objectives:

1. Provide a means of notifying employees, customers and local authorities of an emergency situation.
2. Provide for a safe and orderly method of evacuation of employees and customers from Close Construction Services, LLC premises.
3. Account for all employees who occupied Close Construction Services, LLC premises at the time of evacuation, should one occur.
4. Provide emergency first aid treatment or summon emergency medical assistance for injured employees.
5. Provide training and needed information to those employees responsible for action in the event of an emergency.

Signs as required by ordinance, regulation or law will identify emergency exits. Employees are required to be familiar with the location(s) of alarm pull stations and emergency exits.

Training on Emergency Action Plans will take place during new employee orientation, when changes occur in the action plans, and periodically as coordinated by the Safety and Health Manager.

Smoking is never allowed anywhere on Close Construction Services, LLC premises during an emergency.

If hazardous materials are involved, disposal must be done in compliance with federal, state, and local environmental laws.

Procedure

I. Fire Reporting and Procedure:

If a fire alarm or alert is sounded or a fire is reported by an employee, regardless of the reason for the alarm or the severity of the fire, the following action must be taken immediately:

Senior Management

1. Immediately notifies the Fire Department by dialing 911 (where applicable) or the local fire emergency number:
_____.
2. Gives Close Construction Services, LLC name, address, and area where the fire is located.
3. Assigns an employee to wait for the Fire Department outside Close Construction Services, LLC. and direct them to the fire's location.
4. Announces evacuation instructions over the public address System. "Ladies and Gentlemen". Close Construction Services, LLC is being temporarily closed. We request that you leave by the nearest exit immediately. Thank you."
5. Once outside Close Construction Services, LLC., takes a head count of Employees to ensure all were safely evacuated. Double checks that all individuals are out of Close Construction Services, LLC premises
Note: When one or more employees are unaccounted for, employees are not to re-enter the building to conduct a search. Notify the ranking fire or

other emergency response official on the scene and their approximate location.

6. Immediately after the fire, notify the President of Close Construction Services, LLC and all other management individuals. Coordinate any salvage and repair operations.

- Employee
7. If trained in the use of fire extinguishers, may attempt to suppress a small fire, until relieved by the Fire Department or until it becomes apparent that the fire cannot be controlled by the fire extinguishers.

Note: Employees should never attempt to control a fire, which endangers their health. They must immediately evacuate the area when it becomes apparent that the fire cannot be controlled or when conditions become hazardous.

II. Evacuation

Senior Management

1. Telephones the local emergency agency (for example, fire, police, Hazardous materials team, etc.)
2. Makes the following announcement on the public address System, "Ladies and Gentlemen". Close Construction Services, LLC. is being temporarily closed. Please leave by the nearest exit immediately. Thank you." Make this announcement twice, and repeat it every minute or more Frequently if needed.
3. Checks all areas of their respective departments, restrooms, and public areas to verify that employees and individuals are evacuated.
4. Secures all cash, checks and charge documents in the safe, if time permits.
5. Designates a safe area outside Close Construction Services, LLC as a Gathering point for all employees. Takes a head count of Employees to ensure all were safely evacuated.

Note: Employees are not to re-enter the building.

Management will notify the ranking fire or other emergency response Official on the scene of a potentially trapped person and their approximate whereabouts.

6. Dismisses all non-essential employees.
7. Telephones the President of Close Construction Services, LLC and all other Management personnel.

III. Tornado Preparation and Emergency

Prior to any tornado emergency, Management will designate safe shelter areas within the building for employees and individuals. There are some general guidelines that may be used to aid in the selection of such spaces. When selecting a safe shelter, consider:

- The lowest floor, preferably a basement
- Interior spaces – rooms with no walls on the exterior
- Areas supported by secure, rigid structural frame members
- Short roof spans

Close Construction Services, LLC safe shelter area is located __305 NW 4th Ave Okeechobee, FL 37942___. It will be stocked with a first aid kit or medical supplies and several flashlights.

Tornado Watch Procedures:

Senior Management

1. A Tornado Watch means that conditions are right for severe thunderstorms and possible tornadoes to develop. When notified of a tornado watch in the area, Senior Management will tune the radio to the National Weather Service channel to stay current on the storm progress.
2. Checks to ensure that all safe shelter areas are unlocked and accessible.
3. Checks to be sure that medical supplies and flashlights are stored in the safe shelter area.
4. If time permits, “X” the windows with tape or secure plywood to the outside of the windows.

When someone calls and says there is a bomb in the building, the following steps will be performed:

Employee
(Receiving Threat)

1. Keeps the caller on the line as long as possible. Asks them to repeat the message. Tries to write down every word spoken by the caller.
2. Asks the caller where the bomb is located and when it will go off.
3. Tells the caller that the building is occupied and detonation of a bomb could result in the death and injury to innocent people.
4. Pays particular attention to background noises, such as music playing, engine noises, etc.
5. Listens to the voice, male, female, voice quality, accent, and speech impediments.
6. When the caller hangs up, **do not hang up the phone!** Sometimes, Phones can be traced back to the source. Immediately notify management and describe the threat.
7. Calls the local Police or Fire Department to report the incident. Follows All recommendations and instructions provided by either department.
8. If the Police or Fire Department declines to give instructions to evacuate the building, search the premises (if time permits) for any suspicious looking device or package. If one is found, follow the Evacuation Plan.
Do not touch any suspicious device or package.

V. First Aid

If an employee / individual is injured, the initial responsibility of management is to provide the needed first aid or arrange for emergency medical response or professional medical care.

Senior Management

1. Treats the injured individual using the supplies from Close Construction, Inc.'s first aid kit.
2. In the event an employee is seriously injured and requires professional medical care, drive the employee to a medical provider. If any individual is not mobile or has a life-threatening injury or illness, arrange for emergency care and transportation (call 911).

VI. Hazardous Material Spill

Management will respond to incidental releases of hazardous substances when the substance can be absorbed, neutralized, or otherwise controlled at the time of release by employees in the immediate area or by maintenance personnel. If a large spill or fire occurs that is not controllable, Management will contact the appropriate local authorities, such as the Fire Department.

VII. Earthquake

All employees must be aware of the potential for earthquakes and the resulting damage to buildings and facilities.

A. During an Earthquake:

Employee

1. If indoors, stay indoors; If outdoors, stay outdoors. In earthquakes, most injuries occur when people are entering or leaving buildings.
 - 1a. If indoors:
 - 1) Take cover beneath a desk, table, bench or in doorways, halls or against an interior wall.
 - 2) Stay away from glass windows and glass doors, and away from containers having hazardous material stored.
 - 1b. If outdoors:
 - 1) Move away from buildings and all structure, and all overhead electrical wires.

- 2) If operating a vehicle, stop as soon as possible, but stay inside the vehicle.

B. After an Earthquake:

Senior Management

1. Coordinates first aid efforts.
2. Turns on the radio to get emergency information from local authorities.
3. Check natural gas lines for leaks. If a leak is detected, shuts down the system, and notifies the local gas service company.
4. Shuts off the electrical current at the main breaker box if power has been interrupted.
5. Directs employees and individuals to a safe assembly area outside the building.
6. Takes a head count to ensure all employees were safely evacuated.
7. Does not permit individuals to enter the building again until cleared by authorities.
8. Assigns duties to clean up damage and resume business as soon as possible.

VIII. Robbery:

In the event a robbery occurs, the main objective is to reduce the risk of injury to employees and individuals and to get the robber out of the building as soon as possible.

Employee

1. Be attentive and calm. Listen to the robber and do exactly what he/she asks you to do.
2. Do give up money as demanded.

3. Remain alert. Try to remember details of the robber's appearance, clothing, speech, etc.
4. If possible, watch the robber's method and direction of escape.
5. Expect foul/strong language. Expect to lie on the floor.
6. Do not make any sudden movements.
7. Don't overact. Do not grab for the weapon or call for help.
8. Do not argue.
9. After the robbery, write everything down.

Senior Management

10. Call the police.
11. Call the President and Vice President of Close Construction Services, LLC.
12. Have all witnesses write everything they can recall.

ATTACHMENT 3: CONTRACTOR REFERENCE CHECKS





CONTRACTOR REFERENCE CHECK

CONTRACTOR NAME: Close Construction Services, LLC

REF. FOR W&C PROJECT NAME & NUMBER: Stormwater Improvements – Phase 2 Porter Avenue, #0233076.14

DATE: 11/10/2025

REF. FROM: Tate Yulga, Project Manager, Palm Beach County School District,
Email: tate.yulga@aecom.com, Phone: 651-301-9260

What did the project involve (Contract Name, Value, Project Start Date, Project Completion Date, Description of Scope of Work)?

- Check to see if this information matches: Everglades Elementary School – Additional Parking, West Palm Beach, \$246,571.00, June 2024 to April 2025
- Description of Scope of Work: They installed new gated parking lots, including sidewalks that connected to the school, and ADA compliant parking spaces. Also did the stormwater drainage, resodding of the area, and fencing/gating for the front and back of the parking lot.

How was the quality of work?

- Superb, always satisfied with the final product. To note, the reference mainly worked on the backend of the project, was not super involved with it.

How was the Contractor's paperwork? Was it correct and timely?

- It was correct. The contractor did not have to do much paperwork, but it was on time. They were great at asking questions and they figured it out together.

How were the Contractor's relationships with the Owner? Engineer? Subcontractors?

- Owner: It was positive
- Engineer: It was good, they seemed to like the work
- Subcontractor: N/A

How many change orders? What type? What magnitude?

- ~2, probably \$30,000 total, cannot say who was responsible.

Would you recommend this contractor for similar work? Would you hire the contractor again?

- Yes and yes



CONTRACTOR REFERENCE CHECK

CONTRACTOR NAME: Close Construction Services, LLC

REF. FOR W&C PROJECT NAME & NUMBER: Stormwater Improvements – Phase 2 Porter Avenue, #0233076.14

DATE: 11/10/2025

REF. FROM: Devon Moore, Project Manager, City of Winter Haven, Email: dmoore@mywinterhaven.com, Phone: 863-291-5881

What did the project involve (Contract Name, Value, Project Start Date, Project Completion Date, Description of Scope of Work)?

- Check to see if this information matches: Raingarden & Stormwater Project, Winter Haven, \$673,340.28, February 2024 to August 2024
- Description of Scope of Work: Partially Grant funded, construct green infrastructure within public properties and ROWs, 14 individual BMPs, including rain gardens, bioswales, and exfiltration ponds. Final cost for the project was under budget.

How was the quality of work?

- No issues through the changes that had to be made on the project, owner/engineer-initiated. Work was good, had to redo some asphalt and sodding. None of the correctional work costs were addressed to the city, if CCS made a mistake, they corrected it on their time/money. They were very good at communicating with the owner/engineer. Had issues with Sod not making it through, but no issues were super critical. They were on a very tight budget/time, were able to complete things within the calendar year.

How was the Contractor's paperwork? Was it correct and timely?

- Yes and yes. Owner received invoices in a timely manner. Most of the hang-ups were on the owner's end.

How were the Contractor's relationships with the Owner? Engineer? Subcontractors?

- Owner: Very good
- Engineer: Didn't have a whole lot of communication with the engineer, but no issues regardless
- Subcontractor: As far as he could tell, good. As long as the sub was doing things correctly. They had to fire one of the subs, as the sub was not pulling their weight.

How many change orders? What type? What magnitude?

- Didn't really go through the change order process, just went on the fly changing some grading on the sites.



Would you recommend this contractor for similar work? Would you hire the contractor again?

- Yes and yes, went ahead and told the contractor that they should bid on future projects, as they liked working with them so much.

Were there any bonds invoked or legal efforts initiated by any parties?

- Nope



CONTRACTOR REFERENCE CHECK

CONTRACTOR NAME: Close Construction Services, LLC

REF. FOR W&C PROJECT NAME & NUMBER: Stormwater Improvements – Phase 2 Porter Avenue, #0233076.14

DATE: 11/10/2025

REF. FROM: Steve Fowler, Project Manager, City of Lake Worth Beach,
Email: stephen.fowler@holtzconsulting.com, Phone: 561-575-2005

What did the project involve (Contract Name, Value, Project Start Date, Project Completion Date, Description of Scope of Work)?

- Check to see if this information matches: South Palm Park Sea Mitigation – Stormwater Pump Station, Lake Worth Beach, \$1,097,282.00, September 2023 to November 2024
- Description of Scope of Work: Installation of a pump station structure, valve vault, discharge piping into an intercoastal area, restoration/rehab.

How was the quality of work?

- Eventually got it to be acceptable but was painful process. A lot of handholding and rework required. Didn't have enough resources on the project to do it successfully, a lack of people and a lack of qualified people on site. Multiple instances of damage to private property occurred (addressed it). A specific incident involved a private property brick wall (~75 ft) collapsing after much warning, collapsed due to excavation from the contractor. Also mentions lack of shoring/sheeting around the excavations, lack of dewatering.

How was the Contractor's paperwork? Was it correct and timely?

- Paperwork was fine, correct and timely.

How were the Contractor's relationships with the Owner? Engineer? Subcontractors?

- Owner: They were good, amicable with them.
- Engineer: Amicable, good relationships other than the work.
- Subcontractor: Good as well. Were all paid on time.

How many change orders? What type? What magnitude?

- 1 change order, additional work requested by the owner



Would you recommend this contractor for similar work? Would you hire the contractor again?

- Not for this, may not hire them again.

Were there any bonds invoked or legal efforts initiated by any parties?

- Nope



CONTRACTOR REFERENCE CHECK

CONTRACTOR NAME: Close Construction Services, LLC

REF. FOR W&C PROJECT NAME & NUMBER: Stormwater Improvements – Phase 2 Porter Avenue, #0233076.14

DATE: 11/14/2025

REF. FROM: Patrick Narcisse, Project Manager, Palm Beach County School District,
Email: patrick.narcisse@palmbeachschools.org, Phone: 954-663-2777

What did the project involve (Contract Name, Value, Project Start Date, Project Completion Date, Description of Scope of Work)?

- Check to see if this information matches: Forest Hill High School – Parking Lot, West Palm Beach, \$812,000.00, March 2025 to October 2025
- Description of Scope of Work: Rebuilt the entire parking lot, the main and lower end. Involved having to demolish everything and build it back up. Connect the parking lot to the existing one near the football field. Also involved constructing new stairway. Not much stormwater drainage in the scope.

How was the quality of work?

- Reference stated that on a scale of 1-10, would give them 9.

How was the Contractor's paperwork? Was it correct and timely?

- They had some hiccups, but nothing super critical. Formatting was the main issue but forgave them as they have just started working with them.

How were the Contractor's relationships with the Owner? Engineer? Subcontractors?

- Owner: Yes, it was good
- Engineer: Yes, it was good
- Subcontractor: No issues from what he could tell

How many change orders? What type? What magnitude?

- 4, engineer issued, 6, contractor issued. None of them were the fault of the contractor. A lot of the issues were mainly due to the placement of the trees and having to remove them. Most were due to negligence of the engineer, or at the request of the district.

Would you recommend this contractor for similar work? Would you hire the contractor again?

- Yes and yes



Were there any bonds invoked or legal efforts initiated by any parties?

- Nope



CONTRACTOR REFERENCE CHECK

CONTRACTOR NAME: Close Construction Services, LLC

REF. FOR W&C PROJECT NAME & NUMBER: Stormwater Improvements – Phase 2 Porter Avenue, #0233076.14

DATE: 11/10/2025

REF. FROM: Woodley Pierre, Public Works Superintendent, City of Haines City,
Email: woodley.pierre@hainescity.com, Phone: 863-421-3777

What did the project involve (Contract Name, Value, Project Start Date, Project Completion Date, Description of Scope of Work)?

- Check to see if this information matches: Haines City Rain Garden & Installation Services, Haines City, \$585,000.00, March 2025 to October 2025
- Description of Scope of Work: They called in utility locates, communicated all access stages as well. Did their own MOT, E&S Control, all site prep work. Demolition was handled, excavation of the rain garden, design and slopes. Installed trees, rip rap, plants, conducted site restoration. Still provided services even with hiccups. Wanted to install places that would manage stormwater, and also the beautification of certain areas.

How was the quality of work?

- Very good, and the contractor had higher standards than the owner and made it a priority to make it look great. Planning, all the vision, their communication was fantastic with their superintendent, Clarence Thomas. Highly recommend him and requesting him as the superintendent for the job.

How was the Contractor's paperwork? Was it correct and timely?

- Yes and yes

How were the Contractor's relationships with the Owner? Engineer? Subcontractors?

- Owner: Very good
- Engineer: It was good
- Subcontractors: Everything seemed very good

How many change orders? What type? What magnitude?

- 2 change orders, initiated by the contractor, owner agreed with all of them. Some issues with the inlet, and a sewer line in the way.



Would you recommend this contractor for similar work? Would you hire the contractor again?

- Yes and yes

Were there any bonds invoked or legal efforts initiated by any parties?

- Nope

Were there any bonds invoked or legal efforts initiated by any parties?

- Nope



ORDINANCE 2025-59

AN ORDINANCE OF THE TOWN OF MONTVERDE, FLORIDA, AMENDING SECTION 10-13 IN CHAPTER 10 OF THE TOWN OF MONTVERDE LAND DEVELOPMENT CODE RELATING TO MINIMUM LOT SIZE FOR PROPERTY ANNEXED INTO THE TOWN; PROVIDING FOR CODIFICATION AND SEVERABILITY; PROVIDING FOR THE REPEAL OF ORDINANCES IN CONFLICT HEREWITH; AND PROVIDING FOR AN EFFECTIVE DATE.

WHEREAS, the Town finds that properties annexed into the Town that are subsequently used for residential purposes and made part of an existing residential subdivision may develop into lots less than one acre in size while still being consistent with the Town's historic development pattern provided development does not exceed two residential units per gross acre ; and

WHEREAS, the Town of Montverde desires to amend its Code to reflect ; and

WHEREAS, the Town Council is authorized pursuant to Ch. 166, and 163, Florida Statutes, to adopt this ordinance, and recognize municipal authority to enact regulations to protect health, safety, and welfare; and

WHEREAS, the Planning and Zoning Board of the Town of Montverde considered this ordinance at a public meeting and has made a recommendation to Town Council; and

WHEREAS, the Town Council of the Town of Montverde held a public hearing which was advertised in accordance with law and held such public hearing no less than 10 days after the day advertisement was published.

NOW, THEREFORE, BE IT ORDAINED by the Town Council of the Town of Montverde, Florida, as follows:

SECTION 1. Legislative Findings and Intent. The findings set forth in the recitals above are hereby adopted as legislative findings pertaining to this Ordinance.

SECTION 2. That Section 10-13 of Article I in Chapter 10, Part III (Land Development Code) of the Montverde Code of Ordinances shall be amended to read as follows:

Sec. 10-13. Lot size.

- (a) *Minimum.* All property annexed into the town after March 7, 2000, that is subsequently used for residential purposes, shall maintain a minimum residential lot size of one acre, except as provided herein. Right-of-way, utility easements and easements of a similar nature, including right-of-way and easements dedicated to the town or other political subdivisions for public purpose, may be included when calculating the size of a lot upon the approval of

~~the town council. All property annexed into the town after March 7, 2000, that is subsequently used for residential purposes and which is located in areas accessible to employment and commercial areas as well as being located north and west of Blackstill Lake Road may develop residential lots at less than one acre in size, but may not exceed two residential units per gross acre~~ All property annexed into the town after January 1, 2025 that is subsequently used for residential purposes and developed as a part of an existing residential subdivision may develop into residential lots less than one acre in size, but must not exceed two residential units per gross acre.

- (b) *Compliance with affordable housing provisions set forth in comprehensive plan.* A sufficient amount of land within the town limits shall be designated for affordable housing as required by the town's comprehensive plan. In the event that additional land is needed to meet the affordable housing requirements of the town's comprehensive plan, property annexed into the town after March 7, 2000, may be developed at residential densities consistent with the town's comprehensive plan upon approval of the town council.
- (c) *Effect of ordinance on existing property within the town.* This chapter shall have no effect upon the allowable residential densities or minimum residential lot sizes for property located within the jurisdictional limits of the town as of March 7, 2000. The town's land development regulations and applicable laws shall regulate the uses and development of said property.

SECTION 3. Codification. It is the intent of the Town Council of the Town of Montverde that the provisions of this Ordinance shall be codified. The codifier is granted broad and liberal authority in renumbering and codifying the provision of this Ordinance.

SECTION 4. Severability. If any section, sentence, phrase, word or portion of this Ordinance is determined to be invalid, unlawful or unconstitutional, said determination shall not be held to invalidate or impair the validity, force or effect of any other section, sentence, phrase, word or portion of this Ordinance not otherwise determined to be invalid, unlawful or unconstitutional.

SECTION 5. Conflicts. In any case where a provision of this Ordinance is found to be in conflict with a provision of any other ordinance of this Town, the provision of this Ordinance shall govern.

SECTION 6. Effective Date. This Ordinance shall become effective immediately upon adoption.

PASSED AND DULY ADOPTED by the Town of Montverde, Lake County, Florida this ____ day of _____, 2025.

Joe Wynkoop, Mayor

Attest:

Caroline Trepanier, Town Clerk

Approved as to form and legality:

Anita Geraci-Carver, Town Attorney

First Reading _____

Second Reading _____

Council Member _____ moved the passage and adoption of the above and foregoing Ordinance. Motion was seconded by Council Member _____ and upon roll call on the motion the vote was as follows:

	YEA	NAY
Councilmember Bryan Rubio		
Councilmember Grant Roberts		
Councilmember Joe Morganelli		
Vice Mayor Carol Womack		
Mayor Joe Wynkoop		



STAFF REPORT

LAND DEVELOPMENT CODE (LDC) AMENDMENT

Public Hearings: Planning & Zoning: November 12, 2025
Town Council (1st Hearing): December 9, 2025

Ordinance No.: 2025-59

Applicant: Town of Montverde

Requested Action: The Town seeks to amend the LDC to allow annexed property that is subsequently developed as a part of an existing residential subdivision to develop into residential lots less than one acre in size but not greater than two residential units per gross acre. If approved, the change would align with plans to expand Bella Collina into the Town of Montverde.

Staff Determination: Staff finds the amendment consistent with the Town's Comprehensive Plan which allows two residential units per gross acre and recommends approval.

Background

At the November 12, 2025 meeting, the Planning & Zoning Board recommended denial of Ordinance 2025-59 to bring back a new ordinance that allows property that is annexed into the Town to maintain a minimum residential lot size of one-half-acre. The ordinance language would change from allowing two units per gross acre.

In April of 2025, Ordinances 2025-46, 2025-47, 2025-48, and 2025-49 were presented to P&Z and Town Council (first reading) for the annexation of these nine parcels from Lake County into the Town of Montverde.



The Second Reading of the annexation ordinance will be heard concurrently with the Second Reading of the proposed small scale comprehensive plan amendment. The applicant proposes to develop lots that are 2 units per gross acre. If approved, these nine parcels which total +/- 10 acres will be unified with the +/- 58 acres (already within town limits) for a total of +/- 68 acres which are planned to be developed into a 114-lot, gated neighborhood.

Staff Analysis

COMPREHENSIVE PLAN - FUTURE LAND USE ELEMENT

Policy 1-2.1.1: Land Use Designations, and Maximum Intensity and Density. The Future Land Use Map Series shall designate areas for maximum density/intensity as depicted on Table 4.

Table 4 in Policy 1-2.1.1 of the Future Land Use Element allows Single Family Low Density, at 2 dwelling units per acre.

Policy 1-2.2.2: Interpretation of Residential Density and Intensity Designations. Maximum gross residential densities shall be construed to represent the maximum allowable units which may be constructed on the gross land area, determined by dividing the "maximum allowable units" by the "gross land area" (i.e., dwelling units / gross land area). Residential densities shown on the Future Land Use Map shall be construed as the maximum gross residential density permitted for development in that residential district.

Gross land area shall be construed to represent all land under common ownership proposed for residential development.

Density designations shall be restricted or reduced for the following circumstances:

- (a) Waters of the State shall not be included as gross land area.
- (b) No development shall be permitted in wetlands or floodplains other than passive recreation or conservation uses. Jurisdictional wetlands shall not be included as gross land area.



As of January 1, 2025, new construction Residential Intensity (Impervious Surface Area) shall be regulated on a parcel or lot-by-lot basis including within newly proposed subdivisions.

This policy allows residential densities shown on the Future Land Use Map to be construed as the maximum gross residential density permitted for development in that residential district. Gross land area shall be construed to represent all land under common ownership proposed for residential development.

LAND DEVELOPMENT CODE (LDC) Sec 10-13

- 1) Currently, LDC Sec 10-13 only allows for property that is annexed into the Town after March 7, 2000, to maintain a minimum residential lot size of one acre.
- 2) The proposed change will allow the Town to accommodate the annexation of nine properties, from Lake County into the Town of Montverde, for the purposes of expanding a portion of Bella Collina into the Town limits.
- 3) The proposed Future Land Use for the nine properties is Single Family Low Density Residential.

Town Council Motion Considerations

1. **Recommend approval** of Ordinance 2025-59.
2. **Recommend denial** of Ordinance 2025-59 on the following reasons inconsistent with the Comprehensive Plan and Land Development Code. [Provide specific reasons for recommendation of denial.]
3. **Continue action** on Ordinance 2025-59 pending additional information requested by the Town Council. [Provide specific additional information requested.]



NOTICE OF PUBLIC HEARINGS

The Town of Montverde Planning and Zoning Board will hold a public hearing on **Wednesday, November 12, 2025, at 6:30 p.m.**, and the Town Council will hold public hearings on **Tuesday, December 9, 2025, at 7:00 p.m.**, and **Tuesday, December 16, 2025 at 6:30 p.m.**, at the Town Hall Auditorium located at 17404 Sixth Street, Montverde, Florida to deliberate on the following:

ORDINANCE 2025-59

AN ORDINANCE OF THE TOWN OF MONTVERDE, FLORIDA, AMENDING SECTION 10-13 IN CHAPTER 10 OF THE TOWN OF MONTVERDE LAND DEVELOPMENT CODE RELATING TO MINIMUM LOT SIZE FOR PROPERTY ANNEXED INTO THE TOWN; PROVIDING FOR CODIFICATION AND SEVERABILITY; PROVIDING FOR THE REPEAL OF ORDINANCES IN CONFLICT HEREWITH; AND PROVIDING FOR AN EFFECTIVE DATE.

Interested parties may appear at the public hearings and be heard with respect to the proposed ordinance. Persons with disabilities needing assistance to participate in this proceeding should contact the Town Clerk at least 48 hours before the meetings at 407-469-2681.

This ordinance is available at the Town Clerk's Office, at Town Hall located at 17404 Sixth Street, Montverde, Florida, for inspection on Monday through Thursday, from 8:00 a.m. to 5:00 p.m.

Persons are advised that if they decide to appeal any decision made at this meeting, they will need a record of the proceeding, and for such purposes, they may need to ensure that a verbatim record of the proceeding is made which includes the testimony and evidence upon which the appeal is based, per Section 286.0105, Florida Statutes.

Paul Larino, Town Manager
Town of Montverde

ORDINANCE 2025-60

AN ORDINANCE OF THE TOWN COUNCIL OF THE TOWN OF MONTVERDE, LAKE COUNTY, FLORIDA, AMENDING THE TOWN OF MONTVERDE'S COMPREHENSIVE PLAN PURSUANT TO 163.3187, FLORIDA STATUTES, BY AMENDING THE COMPREHENSIVE LAND-USE PLAN DESIGNATION FROM LAKE COUNTY RURAL TRANSITION AND BELLA COLLINA TO TOWN OF MONTVERDE SINGLE FAMILY LOW DENSITY RESIDENTIAL ON THE FUTURE LAND-USE MAP FOR THE HEREIN DESCRIBED PROPERTY CONSISTING OF 9.47 +/- ACRES PROVIDING FOR SEVERABILITY AND SCRIVENER'S ERRORS; THE DIRECTING THE TOWN MANAGER TO AMEND SAID COMPREHENSIVE PLAN; REPEALING ALL ORDINANCES IN CONFLICT HERewith; PROVIDING FOR THE FORWARDING OF THIS ORDINANCE TO THE STATE OF FLORIDA DEPARTMENT OF COMMERCE; AND PROVIDING FOR AN EFFECTIVE DATE.

WHEREAS, the Town of Montverde desires to amend the Comprehensive Plan for the Town of Montverde by assigning a future land use designation to the property more particularly described below and amending the future land use map to reflect the assigned future land use designation; and

WHEREAS, the Planning and Zoning Board sitting as the Local Planning Agency of the Town of Montverde held a public hearing on this ordinance, which was advertised in accordance with law, and

WHEREAS, the Town Council of the Town of Montverde public hearing has been advertised as required by law for two public hearings with the first public hearing occurring at least 7 days after the first advertisement was published and the second public hearing for adoption of this ordinance occurring at least 5 days after the day of the second advertisement; and

WHEREAS, the Town Council of the Town of Montverde hereby finds and determines that the plan amendment is internally consistent with the Town's Comprehensive Plan; and

WHEREAS, it is in the best interests of the Town of Montverde to amend the Comprehensive Plan for the Town of Montverde as set forth herein.

Now, therefore, it be ordained by the Town Council of the Town of Montverde, Florida:

Section 1. Legislative Findings

The recitals set forth above are hereby adopted as legislative findings of the Town Council of the Town of Montverde.

Section 2. Future Land Use Designation Amendment.

- A. The Property is legally described in **Exhibit A** attached hereto. The location of the property is depicted in **Exhibit B** for visual reference.

The Property consists of 9.47 +/- acres.

- B. That portion of the Future Land Use Element referenced as the Future Land Use Map of the Town of Montverde Comprehensive Plan is hereby amended by changing the Town of Montverde Future Land Use Map designation of the property described in **Exhibit A** (the “Property”) from Lake County Rural Transition and Bella Collina and designating the Property on the Future Land Use Map to:

**TOWN OF MONTVERDE SINGLE FAMILY LOW DENSITY
RESIDENTIAL**

Section 3. Severability.

Upon a determination that by a court of competent jurisdiction that a portion of this ordinance or the comprehensive plan adopted hereby is void, unconstitutional or unenforceable, all remaining portions shall remain in full force and effect.

Section 4. Scrivener’s Errors.

Scrivener’s errors in the legal description may be corrected without a public hearing or at public meeting, by re-recording the original ordinance or a certified copy of the ordinance and attaching the correct legal description.

Section 5. Direction to the Town Manager

Upon the Effective Date of this ordinance, the town manager or designee is hereby authorized to amend the comprehensive plan and future land-use map as identified herein after compliance with F.S. 163.3187 and F.S. 163.3184(11).

Section 6. Repeal

All ordinances or parts of ordinances in conflict herewith are hereby repealed.

Section 7. Adoption

After adoption, a copy hereof shall be forwarded to the Department of Economic Opportunity.

Section 8. Effective Date

This ordinance shall become effective upon the 31st day after adoption unless timely challenged, and then will become effective upon the date a final order is issued by the Department of Economic Opportunities or Administration Commission finding the amendment in compliance in accordance with Section 163.3184, Florida Statutes. No development permits or land uses dependent on this amendment may be issued or commence before it has become effective.

BE IT ORDAINED at a meeting of the Town Council of the Town of Montverde, Lake County, Florida, this _____ day of _____, 2025.

Joe Wynkoop, Mayor

Attest:

Caroline Trepanier, Town Clerk

Approved as to form and legality:

Anita Geraci-Carver, Town Attorney

First Reading _____

Second Reading _____

Council Member _____ moved the passage and adoption of the above and foregoing Ordinance. Motion was seconded by Council Member _____ and upon roll call on the motion the vote was as follows:

	YEA	NAY
Councilmember Bryan Rubio		
Councilmember Grant Roberts		
Councilmember Joe Morganelli		
Vice Mayor Womack		
Mayor Joe Wynkoop		

EXHIBIT A

Legal Description of Property

Lake County Parcel Id No. 11-22-26-0004-000-10000, Alt. Key No. 1037247

Lake County Parcel Id Nos. 11-22-26-0004-000-04200, and 11-22-26-0004-000-02807; Alt. Key Nos. 3809249 and 1592020

Lake County Parcel Id Nos. 11-22-26-0004-000-02801, 11-22-26-0004-000-03600, 11-22-26-0004-000-02809, 11-22-26-0004-000-02802, and 11-22-26-0004-000-03500; Alt. Key Nos. 1592038, 1592054, 1592071, 1592089 and 1814120

Lake County Parcel Id No. 11-22-26-0004-000-02805, Alt. Key No. 1592101

EXHIBIT B
Map Depicting Property





STAFF REPORT

SMALL-SCALE COMPREHENSIVE PLAN AMENDMENT

Public Hearings: Planning & Zoning: November 12, 2025
Town Council (1st Hearing): December 9, 2025

Ordinance No.: 2025-60

Applicant/Owner: Wilmington Development Services, Inc.

Application No.: Z25-000004

Requested Action: The applicant is seeking to amend the Comprehensive Plan Future Land Use Map from Lake County Rural Transition and Bella Collina to Montverde Single Family Low Density Residential for nine parcels of land currently undergoing an annexation application.

Staff Determination: Approval is recommended for up to 19 units, the maximum number of units that would be allowed in the requested Future Land Use designation.

Subject Property Information

Size: Nine parcels, 9.47 acres

Location: 16819 Heatherwood Lane, Montverde, FL. 34756

Alternate Key No.'s:

Lake County Parcels: 1037247, 1592038, 1592054, 1592071, 1592089, 1814120, 3809249, 1592020, and 1592101.

Future Land Use Designation:

Existing: Lake County – Rural Transition & Bella Collina

Proposed: Single Family Low Density Residential (SFL)



Zoning Designation:

Existing: Lake County - Light Industrial (LM), Agriculture (A), and (PUD)

Adjacent Property Land Use

Direction	Zoning	Existing Use	Comments
North	R1M and R1L	Residential	Within Town Limits
East	Bella Collina	Residential	Lake County
South	Bella Collina	Residential	Lake County
West	Bella Collina	Residential	Lake County

R1M: Single Family Medium Density
R1L: Single Family Low Density

Background Information

On November 12, 2025, the Planning & Zoning Board recommended approval of this Ordinance 2025-60.

In April of 2025, Ordinances 2025-46, 2025-47, 2025-48, and 2025-49 were presented to P&Z and Town Council (first reading) for the annexation of these nine parcels from Lake County into the Town of Montverde.

The Second Reading of the annexation ordinance will be heard concurrently with the Second Reading of the proposed small scale comprehensive plan amendment. The applicant proposes to develop lots that are 2 units per gross acre. If approved, these nine parcels which total +/- 10 acres will be unified with the +/- 58 acres (already within town limits) for a total of +/- 68 acres which are planned to be developed into a 114-lot, gated neighborhood.

Staff Analysis

FUTURE LAND USE ELEMENT

Policy 1-2.1.1: Land Use Designations, and Maximum Intensity and Density. The Future Land Use Map Series shall designate areas for maximum density/intensity as depicted on Table 4.

Table 4 in Policy 1-2.1.1 of the Future Land Use Element allows Single Family Low Density, at 2 dwelling units per acre.



Policy 1-2.2.2: Interpretation of Residential Density and Intensity Designations. Maximum gross residential densities shall be construed to represent the maximum allowable units which may be constructed on the gross land area, determined by dividing the "maximum allowable units" by the "gross land area" (i.e., dwelling units / gross land area). Residential densities shown on the Future Land Use Map shall be construed as the maximum gross residential density permitted for development in that residential district.

Gross land area shall be construed to represent all land under common ownership proposed for residential development.

Density designations shall be restricted or reduced for the following circumstances:

- (a) Waters of the State shall not be included as gross land area.
- (b) No development shall be permitted in wetlands or floodplains other than passive recreation or conservation uses. Jurisdictional wetlands shall not be included as gross land area.

As of January 1, 2025, new construction Residential Intensity (Impervious Surface Area) shall be regulated on a parcel or lot-by-lot basis including within newly proposed subdivisions.

This policy allows residential densities shown on the Future Land Use Map to be construed as the maximum gross residential density permitted for development in that residential district. Gross land area shall be construed to represent all land under common ownership proposed for residential development.

LDC Sec. 2-52. - Comprehensive plan.

All developments must be consistent with the town's comprehensive plan which establishes the basis and general guidelines for guiding and regulating land uses. The future land use map of the comprehensive plan should be reviewed to determine if the land use shown would allow the type of development contemplated.

Staff has reviewed the future land use map and confirmed that Single-Family Low Density is an allowed designation, making the proposed SSCPA consistent with the Town's Comprehensive Plan.



LDC Sec 1-2 – Definitions and rules of construction

Density means a ratio of dwelling units per base site area.

Density, residential, means the number of residential dwelling units permitted per gross acre of land and is determined by dividing the number of units by the total area of land within the boundaries of a lot or parcel, preservation and undevelopable areas, or areas below the normal high-water line of a lake. In the determination of the number of residential dwelling units to be permitted on a specific parcel of land, a fractional unit shall not entitle the applicant to an additional unit.

Staff used these definitions in the analysis of this application.

Public Comment

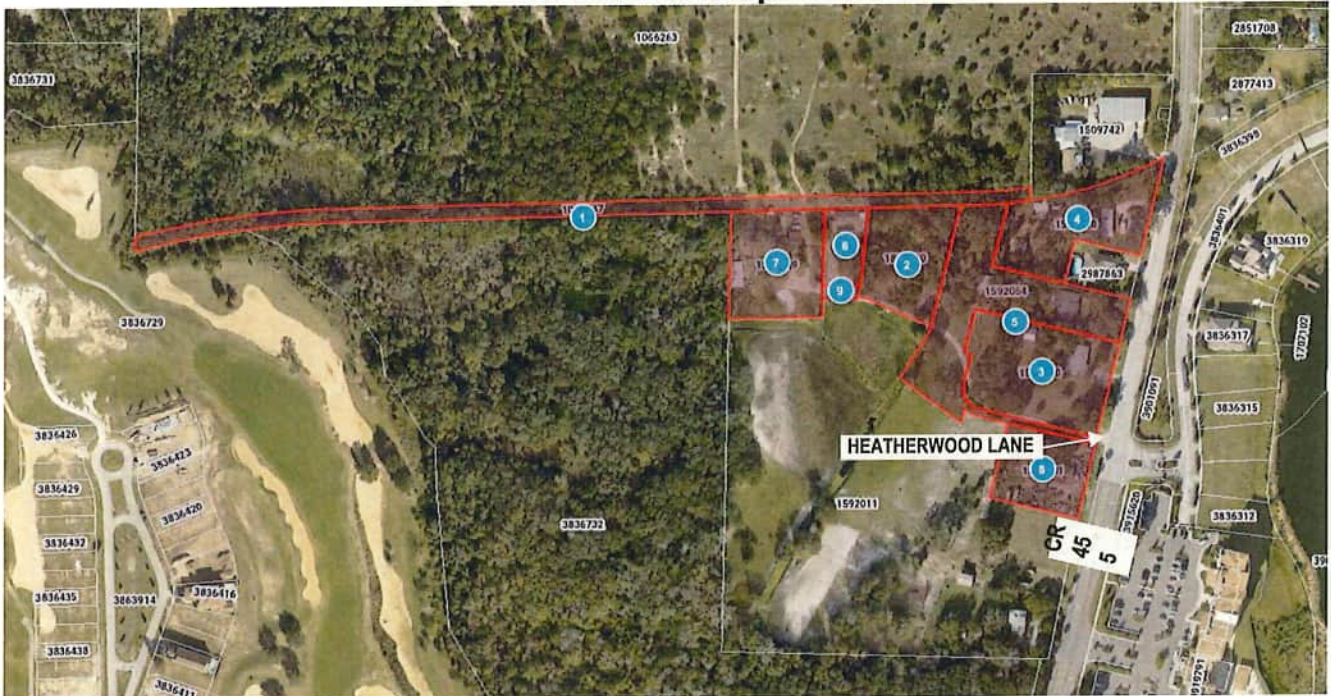
(1) Letter received from a Magnolia Terrace resident regarding the size of buffer.

Town Council Motion Considerations

1. **Recommend approval** of Ordinance 2025-60.
2. **Recommend denial** of Ordinance 2025-60. [Provide specific reasons for recommendation of denial.]
3. **Continue action** of Ordinance 2025-60 pending additional information requested by the Town Council. [Provide specific additional information requested.]

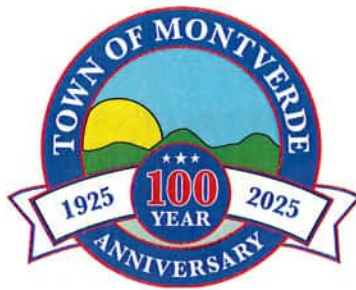


Location Map



Small-Scale Comprehensive Plan Amendment:
9.47 Acres

Alt Key Numbers: 1037247, 1592038, 1592054, 1592071,
1592089, 1814120, 3809249, 1592020, and 1592101.



APPLICATION

**SMALL SCALE COMPREHENSIVE PLAN AMENDMENT
AND REZONING
JUSTIFICATION STATEMENT
(Revised)
Montverde Estates**

1. General Data

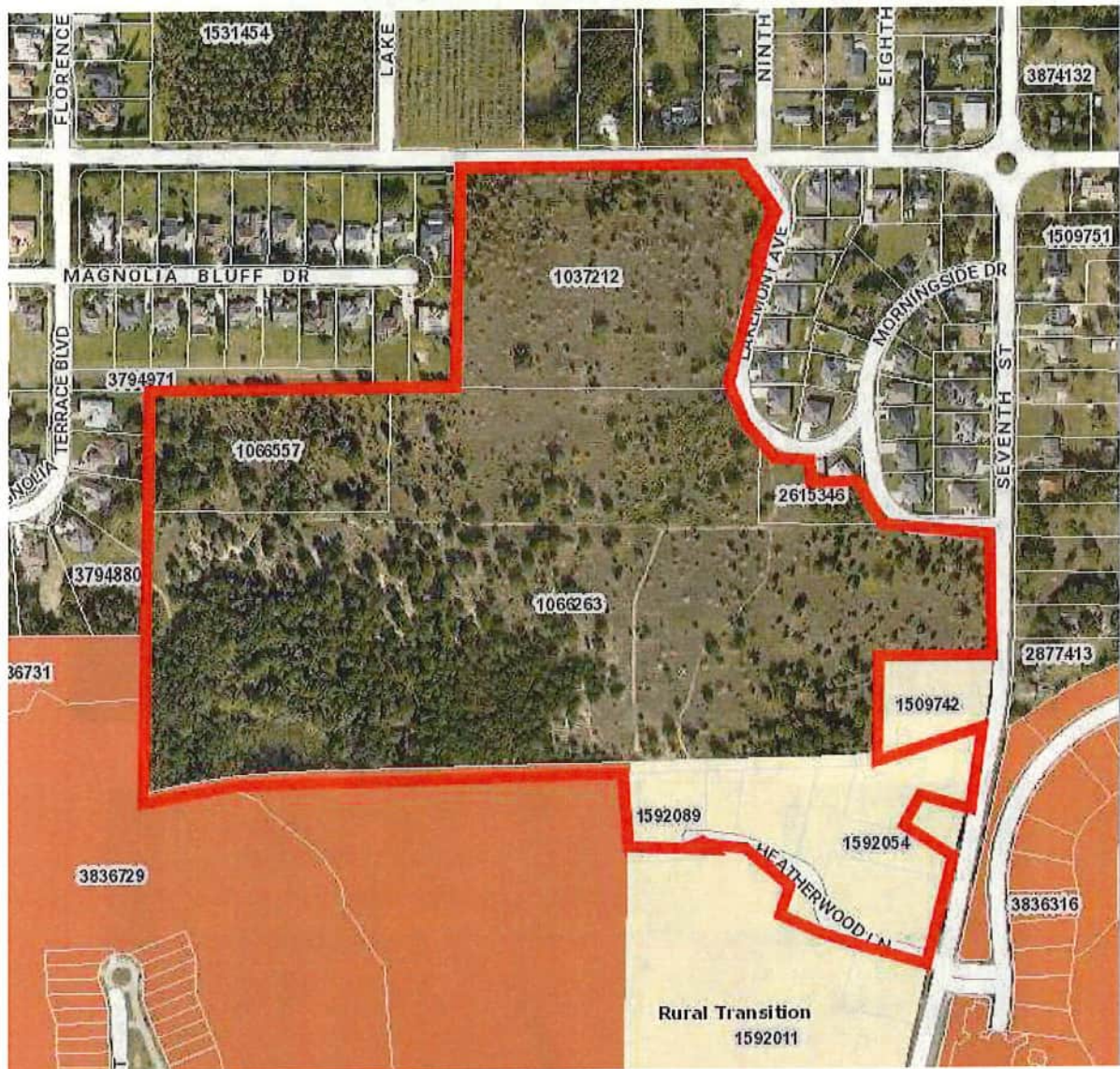
The Subject Property is located in the Town of Montverde, Florida containing approximately 67.78578 acres and generally located in the Montverde area south of Ridgewood Road and west of Seventh Street. An Annexation application has been filed for a portion of the Subject Property consisting of parcels identified as AltKey numbers 3809249, 1814120, 1592071, 1592089, 1592101, 15892020, 1592054, 1592038 and 1037247 (the "Annexation Property"). A Small Scale Comprehensive Plan Amendment is being filed for the Annexation Property (the "Comprehensive Plan Amendment"). Concurrently with the Comprehensive Plan Amendment, a Rezoning application is being filed for the Annexation Property and the following parcels that are currently within the jurisdictional boundaries of the Town identified by AltKey numbers 1037212, 1066557, 1066263, 2615346, (the "Town Property"; together with the Annexation Property, the "Subject Property").

The Comprehensive Plan Amendment and Rezoning will be processed so that they will become effective concurrent with the annexation of the Annexation Property within the jurisdictional boundaries of the Town.

2. Proposed Change

The Comprehensive Plan Amendment is requesting to change the future land use map to change the future land use designations of the Annexation Property from Lake County Rural Transition (RT) to Town of Montverde Planned Unit Development (PUD) (the "Comprehensive Plan Amendment").

LAKE COUNTY FUTURE LAND USE MAP

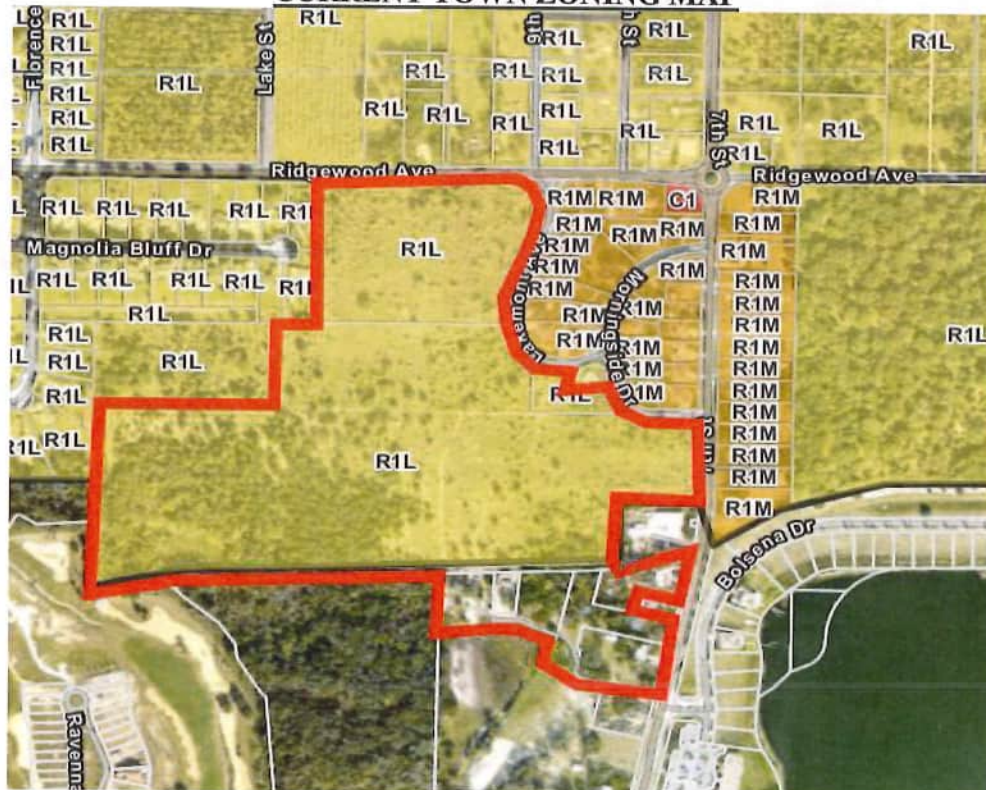


Concurrently with Comprehensive Plan Amendment, the Rezoning application is being submitted seeking to unify the zoning from R1L (Town Single Family Low Density) for the Town Property and LM (County Light Industrial) and A (County Agriculture) for the Annexation Property to PUD (Town Planned Unit Development).

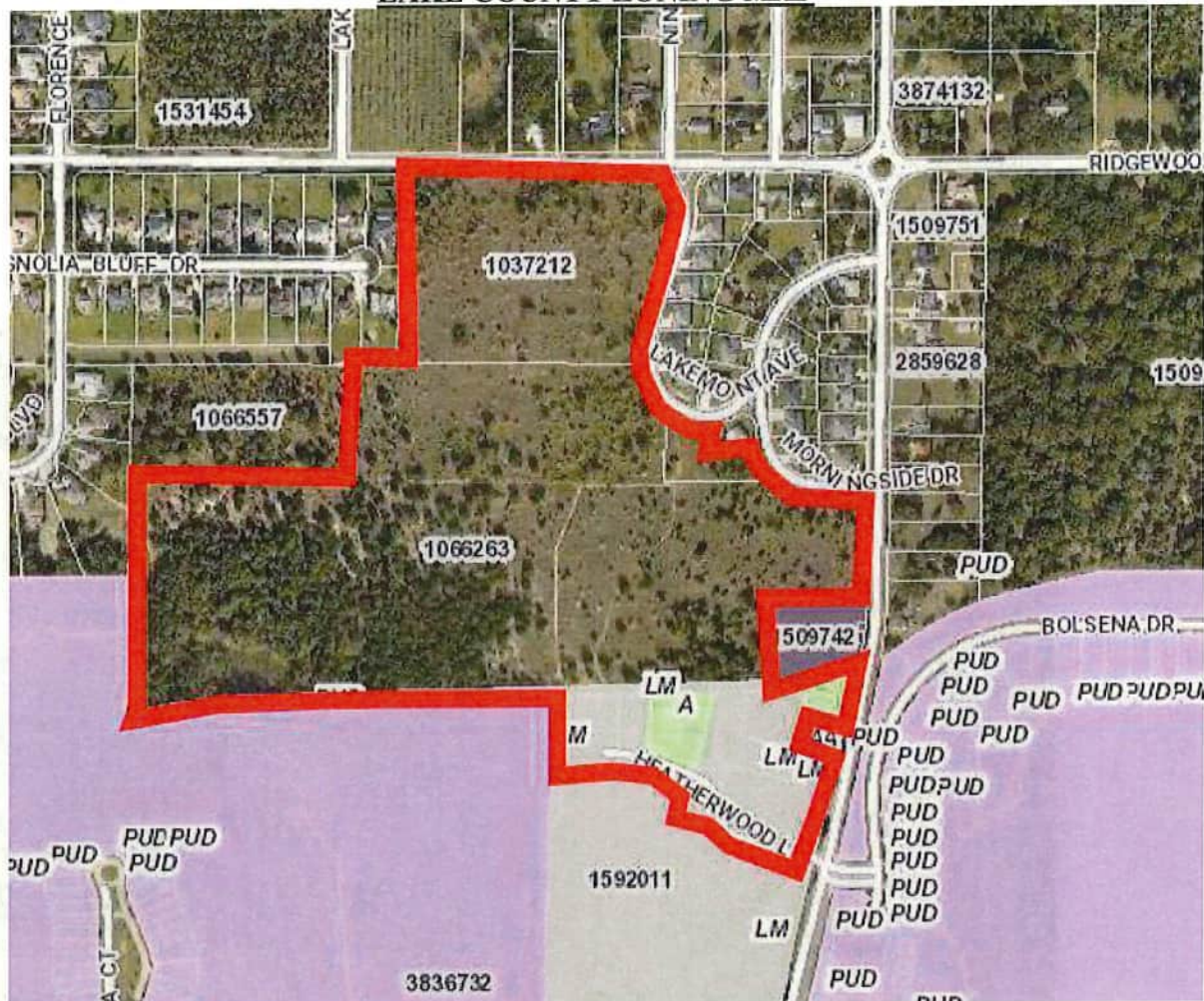
CURRENT TOWN LIMITS MAP



CURRENT TOWN ZONING MAP



LAKE COUNTY ZONING MAP



3. Benefit of Proposed Change

The Subject Property is currently vacant residential or undeveloped parcels located north and east of the Bella Collina. The proposed Comprehensive Plan Amendment and Rezoning would allow the Subject Property to be developed as a master planned single family residential community consisting of 114 homes with dedicated open space and amenities.

4. Compatibility with Land Use

The proposed Comprehensive Plan Amendment and Rezoning is compatible with the surrounding area. The proposed master planned residential community is consistent with the adjacent residential land uses including Magnolia Terrace and Morningside Park Subdivisions. The Bella Collina community lies adjacent property and south of Subject Property and includes residential and commercial uses.

5. Infrastructure and Services

Potable Water and Fire Protection Water: Upon approval of the annexation, the entire Subject Property will be within the Town Limits and the service area of the City of Montverde, the property will access existing water lines located on CR 455 and on Ridgewood Ave. The project will include a looped water line with interconnection to existing water mains on both Ridgewood Ave. and at the CR 455 / Morningstar Drive intersection. The property will receive wastewater service through a central wastewater plant located onsite.



Roads and Drainage: The roadways and drainage system within the Subject Property will be owned and maintained by the Private Homeowners / Property Owners Association.

Police and Emergency Services: The Subject property will be served by Lake County and / or City of Montverde Police and Emergency Services per existing areas of service and cooperative service agreements may require.

Schools: School age students within the community will be eligible for enrollment in Lake County Public Schools.

Impact on Natural Environment: Subject Property is currently partially wooded undeveloped pastureland and also includes existing rural residential homes that will be redeveloped consistent with design standards of the R1L zoning regulations and the Town of Montverde Neighborhood Standards & Guidelines Manual for New Subdivisions with minimal variances the comply with Florida Engergy Efficiency Code for Buildings the SJRWMD and the Bella Collina Property Owners Association Architectural Control Board ("ACB"). These new single-family homes will be connected to a central water / sewer system reducing contamination of nearby water bodies from agricultural runoff and leaking septic tanks. Open space with be provided with conservation easements, upland buffers and passive open space as well as stormwater ponds to ensure protection of the natural environment. Landscaping including trees, shrubs and grass with comply with materials and design specifications set forth in the ACB Guidelines, Rules and Regulations to safeguard wildlife habitats and the natural environment.

6. Conclusion

The Applicant requests an amendment to the Montverde Comprehensive Plan to change the existing FLU designations for the Annexation Property from County Rural Transition and a concurrent rezoning of the entire Subject Property to unify the zoning designations for the Annexation Property from County Light Industrial/Agriculture and the Town Property from Montverde R1L(single family low density) to Montverde PUD. The PUD will establish specific design and performance criteria for a master planned residential community consisting of 114 detached single-family homes with dedicated open space and amenities at a maximum density of 2 du/acre (gross) to ensure compatibility with the surrounding neighborhoods.

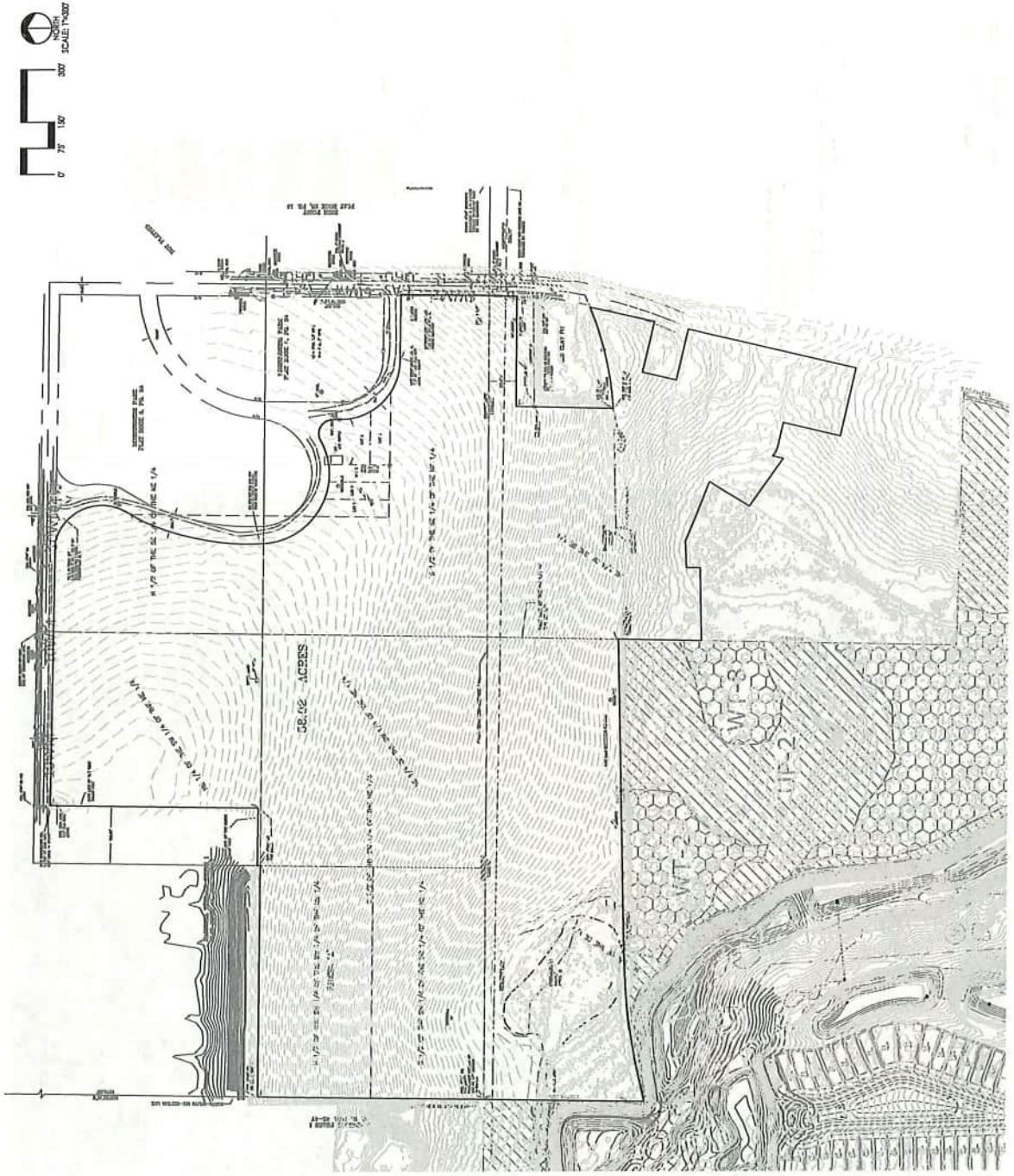
ΕΠΙΧΕΙΡΗΣΙΑΚΟ ΠΡΟΓΡΑΜΜΑ 2000-2006 - ΠΡΟΤΕΙΝΟΜΕΝΕΣ ΠΡΟΒΛΕΨΕΙΣ ΕΣΟΔΩΝ ΚΑΙ ΕΞΟΔΩΝ

Rev.	Date	Description	Check By

MONTVERDE ESTATES
 PREPARED FOR: DCM REAL ESTATE INVESTMENTS, L.P.
 DCM OF HOUSTON
EXISTING CONDITIONS PLAN

Date: 5/15/25
 Scale: AS SHOWN
 Project: 1014-998
 Drawing: 1014-998
 Designer: RT
 Checker: RT
 Checker: SNB

SHEET NO.
1 OF 3



Rev.	Date	Description	By

PD MASTER SITE PLAN
MONTERDE ESTATES
PREPARED FOR: CCA REAL ESTATE INVESTMENTS, LLC
SUBMITTAL FOR: 40 LOTS

Date:	5/15/25
Scale:	AS SHOWN
Project No.:	101-4-998
Drawn By:	ET
Designed By:	ET
Checked By:	SNB



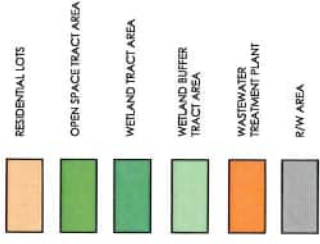
Total Area	67.82	Percent of Site	6%
Minimum Required Common Open Space	10.17	Percent of Site	15%
Open Space Provided	27.56	Percent of Site	41%
Conservation Area	4.03	Percent of Site	6%
Upland Buffer	1.10	Percent of Site	2%
Upland Open Space Area	14.12	Percent of Site	21%
Shrubland and RIB Area	8.61	Percent of Site	13%
Total	27.56	Percent of Site	41%
Total Residential Lots Area	29.32	Percent of Site	43%
Wastewater Facility Area	0.67	Percent of Site	1%
Road Right of Way	9.97	Percent of Site	15%
Maximum Number of Residential Lots	114 Units		
Maximum Gross Density	1.68 DU / Acre		
Maximum Impervious Area (over entire PD)	43%		

Retaining Walls:
Site will include retaining walls of varying height. retaining walls may be located within 10 ft. of the project perimeter and / or within setback areas. Wall heights will be determined at final engineering.

Walls within residential lots shall be decorative split face interlocking block walls.

Tract	Type	Area (ac.)
A	Open Space	5.45
B	Wetland	4.03
C	50' Wetland Buffer	1.10
D	Open Space	8.61
E	Wastewater Treatment Plant	0.67
F	Open Space	1.25
G	Open Space	0.52
H	Open Space	0.42
I	Open Space	0.43
J	Open Space	0.27
K	Open Space	0.28
L	Open Space	0.75
M	Open Space	0.33
N	Open Space	0.16
O	Open Space	0.43
P	Open Space	2.62
Q	Open Space	0.52
R	Open Space	0.29
Residential	N/A	29.32
R/W Area	N/A	9.97
Total	N/A	67.82

LEGEND



VARIANCES FROM THE TOWN OF MONTVERDE NEIGHBORHOOD STANDARDS & GUIDELINES MANUAL FOR NEW SUBDIVISIONS

SECTION IV(B): HOUSING MODEL / STYLE VARIETY

- Each development of 50 or more homes shall have at least seven (7) models with at least three (3) variations and material treatments for each model. Each development of 30 or more homes shall have at least four (4) models with three (3) variations and material treatments for each model which will be individually approved by the Bella Collina Architectural Control Board (the "ACB").
- No street block should have more than two consecutive single-family homes with the same house model. Home elevations, roof style & color and main house body color schemes shall not be duplicated within four (4) homes of each other, both on the same side of the street and across the street.

E. ARCHITECTURAL STANDARDS

- General Architectural Standards for all Homes
 - Overhangs and eavings shall be no less than two (2) feet deep to function as an energy conservation measure and protect people and the house from bright sunlight. Overhangs and eavings shall be no less than 18 inches in addition to all homes meeting the 2023 Florida Energy Efficiency Code for Buildings.

F. ARCHITECTURAL STANDARDS

- General Architectural Standards for all Homes
 - Garages
 - Where lots are 50 ft or less in width, garages must be alley-loaded.
 - A front-loaded lot with side-facing door(s) must incorporate windows and trim on the wall facing the front street.
 - Front-loaded garage lots must randomly alternate the location of driveways in relation to front facade to avoid repetition.
 - Where more than 25 percent of the lots in proposed subdivision (all phases) are permitted to contain front-loaded garages:

v. Garages must be at a minimum 27 ft x 20 ft interior size.

All residential dwellings shall include a garage adequate to park at least two (2) large-sized automobiles. All garages shall be constructed of the same exterior materials and colors as the main structure. Garages shall not be used for any purposes which may prevent the daily use of the garage for the primary purpose of parking at least two (2) operating automobiles. On larger lots as defined by the ACB, garage doors facing the front street will be highly discouraged. Garage doors that face the street shall be of unique design, finish, and material, as specifically submitted to and approved by the ACB. All garage doors must be decorative including the use of glass inserts. Full glass garage doors are permitted with ACB approval. Any garage windows in garage walls visible from the street, public right-of-way or adjoining property shall have interior coverings that are consistent with the window coverings inside the house and plantings that are a minimum of 3' tall at maturity for screening from the view of the street and adjacent lots.

- Internal Sidewalks - A minimum six (6) foot wide sidewalk shall be constructed along each side of all streets. Each sidewalk shall be located within and in parallel alignment with the street right-of-way; the back of the sidewalk shall be found contiguous with the right-of-way and property line boundary. Standard right-of-way grade shall provide a maximum elevation of three-quarters inch rise per one-foot run; beginning from the back of the curb to the intersection point at the front of the sidewalk. All sidewalks shall have handicapped access at all intersections and be ADA compliant. A minimum five (5) foot wide sidewalk shall be constructed in Old Castle Appian Napoli shall be constructed in Old Castle Appian Napoli concrete pavers along each side of all streets within the gated section of the development. All sidewalks outside of the gated section of the development will require a minimum six (6) foot wide concrete sidewalk.

f. Water Conservation

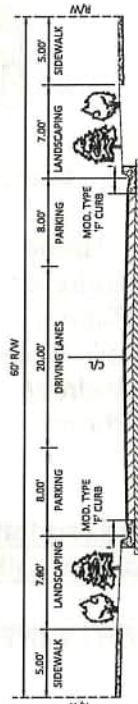
Consistent with the Town's Comprehensive Plan for any proposed subdivision having more than 25 lots, non-potable sources for landscape irrigation must be provided. All Owners, Builders and subcontractors are required to abide by the water restrictions when planning, planting and modifying landscaping or irrigation systems. The total area of irrigation may not exceed the allowable area per the consumptive use permit issued by St. Johns River Water Management District ("SJRWMD"). Each Home will have an automatic irrigation system that is monitored and controlled by the Bella Collina Property Owners Association (the "POA"). In an effort to conserve water, SJRWMD has established water conservation requirements for all water usage within the development, which will be enforced by the POA. In order to enforce these water conservation requirements, the POA has developed a list of conditions and restrictions for water usage by owners. If an owner fails to comply with these conditions and restrictions, then the water service to that owner's property shall be terminated and shall remain terminated until owner complies with all conditions and restrictions. All plans and specifications submitted for final approval whether new construction or modification shall include evidence of compliance with the provision. Low volume toilets and showerheads must be incorporated into all residential plumbing systems. In the event that SJRWMD declares a water shortage, all Owners must adhere to the water shortage restrictions issued by SJRWMD. The soil amendments such as Profile and Command soil, or equivalent, shall be incorporated into the cleared portion (plantings and sod) of all residential lots. The application of soil amendments shall conform to the manufacturer's recommendation. St. Augustine grass shall not be planted. Owners shall use drought tolerant Zoysia or Bahia grass. Micro-irrigation techniques shall be tried in locations where irrigation systems shall be zoned according to plant water requirements. Irrigation systems shall be designed to prevent over-spraying onto impervious surfaces (such as driveways and sidewalks). Irrigation systems shall incorporate an automatic shut-off rain sensor. All residential landscape plans must be certified upon delivery by a Florida registered landscape architect and must be submitted to the ACB for review. All residential landscape plans must be approved by the ACB before commencement of work. All residential landscaping shall comply with the Landscape Materials List and Guidelines and Lot Landscape Specifications set forth in the ACB Guidelines, Rules, and Regulations.

Rev.	Date	Description	Check by

Montverde Estate PD Zoning Standards:

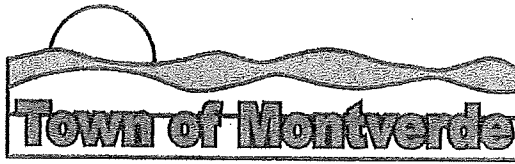
- Permitted uses. The following are permitted uses in this zoning district:
 - (1) Single-family dwelling units having a minimum living area of 2,500 square feet exclusive of garages, and exterior covered or screened areas.
 - (b) Lot development standards:

	Lots 1-100	Lots 101-114
Minimum lot size for buildings	9,800 square feet	7,800 square feet
Minimum lot width at building setback	70 feet	60 feet
Minimum street frontage lot width (lots on a corner)	50 feet	50 feet
Maximum lot coverage	65%	65%
Front yard minimum building setback	20 feet	20 feet
Adjacent to SR 455, minimum building setbacks	35 feet	35 feet
Side yard minimum building setback	7 1/2 feet	7 1/2 feet
Side yard at Corner minimum setback	17 1/2 feet	17 1/2 feet
Rear yard minimum setback	20 feet	20 feet
Pool, screen enclosure and / or decking	7 1/2 feet from any property line	7 1/2 feet from any property line
Driveway	3 feet from property line.	3 feet from property line.
Accessories Structures (Rear Yard Only)	7 1/2 feet	7 1/2 feet
AC Pads / pool equipment	7 1/2 feet from any property line	7 1/2 feet from any property line
Maximum building height	Two stories or 35 feet	Two stories or 35 feet
Parking, residential	Minimum of two off-street spaces	Minimum of two off-street spaces



60' TYPICAL STREET R/W

SCALE: NTS



TOWN OF MONTVERDE
Concurrency Management Review System

1. Owner's Name: Wilmington Development Services, Inc./DCS Real Estate Investments, LLC
Address: 505 S. Flagler Dr., Ste. 900, West Palm Beach, FL 33401
Phone: _____
2. Applicant's Name: Jonathan P. Huels, Esq., Lowndes
Address: 215 N. Eola Dr., Orlando, FL 32801
Phone: 407-418-6483

(A notarized letter of authorization to act on the behalf of the owner must be submitted if the applicant is not the owner.)

PROPERTY INFORMATION

Project Name: Montverde Estates
Project Address: See attached parcel list.
Tax Identification Number: See attached parcel list.

In addition, attach a copy of the site's legal description.

Gross Acreage: 67.78574 ac. Area of Development: 9.47 acres
Existing Zoning: LM and SFL (County) Existing Land Use: Vacant residential; non-agricultural
Proposed Zoning: PUD Proposed Land Use: R1L
Existing Use on Site: Undeveloped land
Proposed Use on Site: Single family detached houses

Is concurrency application related to a specific project? xx YES NO

Have plans been submitted for this project? YES xx NO

Please indicate what type of project is being submitted:

[] Conceptual Review:

<u> </u> Plan Amendment	<u> </u> Rezoning
<u> </u> Preliminary Subdivision	<u> </u> Preliminary Site Plan
<u> </u> Amendment to Future Land Use	<u> </u> Conditional Use
<u> </u> Preliminary Development Plan	

[X] Preliminary Development Review:

<u>xx</u> Plan Amendment *	<u> </u> Rezoning
<u> </u> Preliminary Subdivision	<u> </u> Preliminary Site Plan

* Proposed text amendment to allow for the development of 136 single family residential homes at a maximum density of 2 du/acre (gross).

xx Amendment to Future Land Use _____ Conditional Use
_____ Preliminary Development Plan

_____Final Site Plan

 DRI

_____Final Plan & Plat

 YES XX NO

If YES, what is the project name? _____

Expiration Date

RESIDENTIAL PROJECTS ONLY:

Total Acreage of Project: 67.785 ac Total Number Dwelling Units: 114 SF units

Total No SF
Units

Total No MF
Units

Phase I:

Use #1

Use #2

Use #3

Phase II:

Use #1

Use #2

Use #3

TRANSPORTATION

All projects must submit a transportation impact study with this application. The methodology for the study must be approved by the Town prior to submittal with the application

The applicant must reapply for this test if a completed plan application is not submitted within sixty (60) days of these test results.

The applicant understands that there are no express, no implied, vested rights granted by the submission of or acceptance by the Town of this application, and only after all of the requirements of this application have been met will the Town of Montverde review this application.

Signature of Applicant

Date

Small Scale Comprehensive Plan

Parcel List

ALTKEY	ACREAGE	PARCEL ID	PARCEL ADDRESS	OWNER	CURRENT FLU:	CURRENT ZONING:	PROPOSED ZONING
3809249	0.05497565	11-22-26-0004-000-04200	Heatherwood Lane	Wilmington Development Services, LLC	Lake Co.-RT	Lake Co.-LM	R1L
1814120	1.0093033	11-22-26-0004-000-03500	16819 Heatherwood Lane	Wilmington Development Services, LLC	Lake Co.-RT	Lake Co.-LM	R1L
1592071	0.35616099	11-22-26-0004-000-02809	16801 Heatherwood Lane	Wilmington Development Services, LLC	Lake Co.-RT	Lake Co.-LM	R1L
1592089	1.14460929	11-22-26-0004-000-02802	16739 Heatherwood Lane	Wilmington Development Services, LLC	Lake Co.-RT	Lake Co.-LM	R1L
1592101	0.78333324	11-22-26-0040-000-02805	16309 C.R. 455	Wilmington Development Services, LLC	Lake Co.-RT	Lake Co.-LM	R1L
1592020	1.57905314	11-22-26-0004-000-02807	16333 C.R. 455	Wilmington Development Services, LLC	Lake Co.-RT	Lake Co.-LM	R1L
1592054	1.92180506	11-22-26-0004-000-03600	16345 C.R. 455	Wilmington Development Services, LLC	Lake Co.-RT	Lake Co.-LM	R1L
1592038	1.24362147	11-22-26-0004-000-02801	16411 C.R. 455	Wilmington Development Services, LLC	Lake Co.-RT	Lake Co.-LM	R1L
1037247	1.378578	11-22-26-0004-000-10000	Old Railroad Site	DCS Real Estate Investments, LLC	RT/PUD	Lake Co.-LM	R1L
	9.47144014	TOTAL COUNTY ACREAGE					



ADVERTISING INFORMATION



NOTICE OF PUBLIC HEARINGS

You are receiving this notice because you own property within 300-feet of a property requesting a Small-Scale Comprehensive Plan Amendment (see below). The Town of Montverde is required by law to notify you of the upcoming public meetings. If you have no questions, or do not wish to attend these meetings, you may disregard this notice. No action is required of you.

The Town of Montverde Planning and Zoning Board will hold a public hearing on **Wednesday, November 12, 2025, at 6:30 p.m.**, and the Town Council will hold public hearings on **Tuesday, December 9, 2025, at 7:00 p.m.**, and **Tuesday, December 16, 2025 at 6:30 p.m.**, at the Town Hall Auditorium located at 17404 Sixth Street, Montverde, Florida to deliberate on the following:

ORDINANCE 2025-60

AN ORDINANCE OF THE TOWN COUNCIL OF THE TOWN OF MONTVERDE, LAKE COUNTY, FLORIDA, AMENDING THE TOWN OF MONTVERDE'S COMPREHENSIVE PLAN PURSUANT TO 163.3187, FLORIDA STATUTES, BY AMENDING THE COMPREHENSIVE LAND-USE PLAN DESIGNATION FROM LAKE COUNTY RURAL TRANSITION AND BELLA COLLINA TO TOWN OF MONTVERDE SINGLE FAMILY LOW DENSITY RESIDENTIAL ON THE FUTURE LAND-USE MAP FOR THE HEREIN DESCRIBED PROPERTY CONSISTING OF 9.47 +/- ACRES, PROVIDING FOR SEVERABILITY AND SCRIVENER'S ERRORS; THE DIRECTING THE TOWN MANAGER TO AMEND SAID COMPREHENSIVE PLAN; REPEALING ALL ORDINANCES IN CONFLICT HERewith; PROVIDING FOR THE FORWARDING OF THIS ORDINANCE TO THE STATE OF FLORIDA DEPARTMENT OF COMMERCE; AND PROVIDING FOR AN EFFECTIVE DATE

Interested parties may appear at the public hearings and be heard with respect to the proposed ordinance. Persons with disabilities needing assistance to participate in this proceeding should contact the Town Clerk at least 48 hours before the meetings at 407-469-2681.

This ordinance is available at the Town Clerk's Office, at Town Hall located at 17404 Sixth Street, Montverde, Florida, for inspection on Monday through Thursday, from 8:00 a.m. to 5:00 p.m.

Persons are advised that if they decide to appeal any decision made at this meeting, they will need a record of the proceeding, and for such purposes, they may need to ensure that a verbatim record of the proceeding is made which includes the testimony and evidence upon which the appeal is based, per Section 286.0105, Florida Statutes.

Paul Larino, Town Manager
Town of Montverde

LOCATION MAP



Heatherwood Lane & CR 455 – Montverde, FL
Alt Keys: 1037247, 3809249, 1592020, 1592038, 1592054, 1592071,
1592089, 1592101, 1814120

A Small-Scale Comprehensive Plan Amendment has been requested to support a proposed 67.57-acre residential neighborhood near Heatherwood Lane. The proposed project includes 114 single-family homes within a gated community. The amendment would allow the property—currently a mix of land in Lake County and within Montverde—to be brought under the Town's Future Land Use Map for coordinated planning.

ADAMS MICHAEL J & SHELLEY R
16735 RIDGEWOOD AVE
MONTVERDE, FL 34756

ALLAN M DE LA CONCHA INTER
VIVOS REVOCABLE TRUST
16615 SEVENTH ST
MONTVERDE, FL 34756

ALTMAN DAVID W & SHERRY W
16406 MAGNOLIA BLUFF DR
MONTVERDE, FL 34756

ANGELA M HAMILTON REVOC TRUST
16430 MAGNOLIA BLUFF DR
MONTVERDE, FL 34756

BAKER KEVIN J & CHERYL D
16716 MAGNOLIA TERRACE BLVD
MONTVERDE, FL 34756

BARISANO JONATHAN & JESSICA
16550 MORNINGSIDE DR
MONTVERDE, FL 34756

BELLA COLLINA PROPERTY OWNERS
ASSN INC
1631 E VINE ST STE 300
KISSIMMEE, FL 34744

BLOSSOMS INVESTMENT
PROPERTIES LLC
PO BOX 560619
MONTVERDE, FL 34756-0619

BLUE WATER MINING LLC
7410 30TH CT
VERO BEACH, FL 32967

BOSWORTH BRUCE A & JO ANN
LIFE ESTATE
16625 MORNINGSIDE DR
MONTVERDE, FL 34756

BOYD RICHARD L & CHERYL L
16830 RIDGEWOOD AVE
MONTVERDE, FL 34756

BURDEN ALLEN M & MELODY P
PO BOX 560163
MONTVERDE, FL 34756-0163

BURDEN TERRY A ET AL
PO BOX 560163
MONTVERDE, FL 34756-0163

BWJ LLC
11030 ULLSWATER LN
WINDERMERE, FL 34786

CARROLL JOHN B
17638 GLADYS ST
MONTVERDE, FL 34756

CHABERT BARRETO ASTRID M &
ENRIQUE A SANTIAGO
16424 MAGNOLIA BLUFF DR
MONTVERDE, FL 34756

COLEMAN ANDREA
16546 SEVENTH ST
MONTVERDE, FL 34756

CORREY TIM & REGINA L MAZAK
16751 RIDGEWOOD AVE
MONTVERDE, FL 34756-3429

DAVID L BOSTWICK & SUAN D
THOMPSON JOINT REVOC TRUST
16816 LAKEMONT AVE
MONTVERDE, FL 34756

DCS CAPITAL INVESTMENTS LLC
505 S FLAGLER DR STE 900
WEST PALM BEACH, FL 33401

DCS REAL ESTATE INVESTMENTS LLC
217 PERUVIAN AVE STE 2
PALM BEACH, FL 33480-4688

DCS REAL ESTATE INVESTMENTS LLC
505 S FLAGLER DR STE 900
WEST PALM BEACH, FL 33401-5948

DCS REAL ESTATE INVESTMENTS LLC
505 S FLAGLER DR STE 900
WEST PALM BEACH, FL 33401-5948

DE CLERCQ ANDREW & TINA
16540 MORNINGSIDE DR
MONTVERDE, FL 34756

DEBORAH J PERLET REVOCABLE
LIVING TRUST
16412 MAGNOLIA BLUFF DR
MONTVERDE, FL 34756

DELANEY DEBRA C TRUSTEE
16724 MAGNOLIA TER
MONTVERDE, FL 34756-3512

DELISLE ERIC B
16829 RIDGEWOOD AVE
MONTVERDE, FL 34756

ELDRIDGE JOHN & KERRY
16436 MAGNOLIA BLUFF DR
MONTVERDE, FL 34756-3507

FAITHS PROMISE LLC
203 MOHAWK RD
CLERMONT, FL 34715

GANT EBONI & DEVIN D
16528 BOLSENA DR
MONTVERDE, FL 34756

GONZALEZ HUGO & ANA MARIA
700 GRISHAM ST
WINTER GARDEN, FL 34787

GUSTINO JAMES A & WENDY L
16632 MORNINGSDR
MONTVERDE, FL 34756

HEATHMAN DALE J & DEBRA A
PO BOX 560186
MONTVERDE, FL 34756-0186

HERON BARRY & LOUISE
16356 MAGNOLIA BLUFF DR
MONTVERDE, FL 34756-3510

HILL JAMES M
16824 RIDGEWOOD AVE
MONTVERDE, FL 34756

HORST JEFFREY LIFE ESTATE
16748 MAGNOLIA TERRACE BLVD
MONTVERDE, FL 34756

HUDDERS EUGENE S
16721 MAGNOLIA TERRACE BLVD
MONTVERDE, FL 34756

HUNT FREDDIE W & JANIE W
1630 PINE RIDGE DAIRY RD
FRUITLAND PARK, FL 34731

IRIZARRY ANGEL A & SANDRA
451 FREEMAN ST
LONGWOOD, FL 32750

JOHNSON JEFFREY Z JR & MELISSA C
16455 MAGNOLIA BLUFF DR
MONTVERDE, FL 34756

JOHNSON MATTHEW &
16401 COUNTY ROAD 455
MONTVERDE, FL 34756

KENNEDY THOMAS G LIFE ESTATE
PO BOX 560256
MONTVERDE, FL 34756-0256

LAKE APOPKA NAT GAS DISTRICT
PO BOX 771275
WINTER GARDEN, FL 34777-1275

LEONARD ANTHONY L & GRETCHEN
16442 MAGNOLIA BLUFF DR
MONTVERDE, FL 34756

LOPEZ-RAMIREZ CARMEN L
1535 HAWKESBURY CT
WINTER GARDEN, FL 34787

LORI S BRUCKHEIM REVOC TRUST
16629 MORNINGSDR
MONTVERDE, FL 34756

MAGNOLIA TERRACE HOA INC
PO BOX 560252
MONTVERDE, FL 34756-0252

MATHUR ADESH & RUCHIKA
16524 BOLSENA DR
MONTVERDE, FL 34756

MC CORMACK SHANE A &
ALEXANDRA M BARKER
16449 MAGNOLIA BLUFF DR
MONTVERDE, FL 34756

MC NEES SCOTT & MARY
16732 MAGNOLIA TERRACE BLVD
MONTVERDE, FL 34756

MORNINGSDR PARK PROPERTY
OWNERS
UNKNOWN
UNKNOWN, UU 99999

MORTON SHANNON M
16836 RIDGEWOOD AVE
MONTVERDE, FL 34756

OYOLA JUANA
16546 MORNINGSDR
MONTVERDE, FL 34756

PERDUE JERRY & LIZZA
16800 LAKEMONT AVE
MONTVERDE, FL 34756

PERGRAM KIERA A & MICAH J
16443 MAGNOLIA BLUFF DR
MONTVERDE, FL 34756

PHIRI GERALD & KHRYSTAL L
16820 LAKEMONT AVE
MONTVERDE, FL 34756

POMPEO JOHN D & TISHA
CHRISTOPHER
16400 MAGNOLIA BLUFF DR
MONTVERDE, FL 34756-3507

PRICE JOHN S & NANCY J
16796 LAKEMONT AVE
MONTVERDE, FL 34756

PRICE MARGARET A & ELVIS
16808 LAKEMONT AVE
MONTVERDE, FL 34756

RITTENBERG JONATHAN S & MARIA J
16448 MAGNOLIA BLUFF DR
MONTVERDE, FL 34756

ROBERT T J BOND REVOC TRUST
16418 MAGNOLIA BLUFF DR
MONTVERDE, FL 34756

RODRIGUEZ COLLADO JONATHAN &
SHARON MIRANDA
16817 RIDGEWOOD AVE
MONTVERDE, FL 34756

ROOT SAMUEL ET AL
16649 MORNINGSIDE DR
MONTVERDE, FL 34756

ROSS KATHLEEN A & CHARLES F
16812 LAKEMONT AVE
MONTVERDE, FL 34756

SALBER ZANE M & KAEA Y
16450 COUNTY ROAD 455
MONTVERDE, FL 34756

SIENA AT BELLA COLLINA
CONDOMINIUM ASSN INC
505 S FLAGLER DR STE 900
WEST PALM BEACH, FL 33401

STECKELBERG WILLIAM
16619 7TH ST
MONTVERDE, FL 34756

TARVER ANDREW A & PAMELA D H
16454 MAGNOLIA BLUFF DR
MONTVERDE, FL 34756

TORRES JUAN J & GRICELDA
499 PICWOOD CT
OCOE, FL 34761

TOWN OF MONTVERDE
PO BOX 560008
MONTVERDE, FL 34756-0008

TUCKER LUCAS M & KACI E
16804 LAKEMONT AVE
MONTVERDE, FL 34756

VANDERWILL WILLIAM C LIFE ESTATE
PO BOX 560032
MONTVERDE, FL 34756-0032

WESTLUND JEREMY J & KIMBERLY D
16611 SEVENTH ST
MONTVERDE, FL 34756

WILMINGTON DEVELOPMENT
SERVICES INC
505 S FLAGLER DR STE 900
WEST PALM BEACH, FL 33401-5948

WLADYCZKA JAROSLAW S & MARTA
16632A MORNINGSIDE DR
MONTVERDE, FL 34756



PUBLIC COMMENTS

October 15, 2025

Town of Montverde
17404 Sixth Street
Montverde FL 34756

Attn: Joe Wynkoop, Mayor
Copy: Paul Larino, Town Manager
Planning & Zoning Board

Dear Mr. Wynkoop,

We would like to address the development of Plat 4 which is located directly behind our property at 16418 Magnolia Bluff Drive, per the notification received in mid-September.

My husband and I had been looking for the 'just right' location and home for several months during 2024 and even prior to that, all during increasing prices and people buying homes as quickly as they came onto the market. When this property became available we immediately went to view it, absolutely fell in love with the Montverde area, and with the stunning view from our back yard. This view was the deciding factor to purchase immediately. We bought it with the surety that it would be our 'final/last' home since we are both in our 80's. We weren't concerned about any changes in our probable lifetime.

It is difficult to oppose development and certainly the Town of Montverde is anxious to add tax-paying properties as well. That is progress.

As you can understand, we and other neighbors are deeply concerned about losing our beautiful view. We are asking that our Mayor and the Town Council, as well as the Planning and Zoning Board, consider our request as follows.

"We are desperately pleading that a 20-25 foot border of the current trees and undergrowth be left as is. This would provide a barrier between our homes and the Plat 4 development."

I, and others, did attempt to attend the first scheduled Planning and Zoning meeting on September 23, 2025 at 6:30pm. Upon arrival we found a sign on the door stating that the meeting had been cancelled. I've been following the Town online postings and have not seen notice of another such meeting. Someone I spoke with did say that the Planning and Zoning Board would need to be first in line to discuss a re-zoning so I'll keep watching for their meeting.

Is there anything else that any of us could be doing to make ourselves heard on this subject? We can be reached at 352-552-1933 (call or text), as well as email: glhg39@yahoo.com

Thanks so much,



Gayle Bond and Robert Bond

Enclosure: picture of view



Save Our Trees



STAFF REPORT

RE-ZONING TO PLANNED UNIT DEVELOPMENT (PUD)

Public Hearings: Planning & Zoning: November 12, 2025
Town Council (1st Hearing): December 9, 2025

Ordinance No.: 2025-61

Applicant/Owner: Wilmington Development Services, Inc.

Application No.: Z25-000005

Requested Actions: The applicant is seeking a Re-Zoning from Lake County Agriculture, PUD, Light Industrial and Montverde Single Family Low Density to Montverde Single Family Residential PUD.

Staff Determination: The requested actions are consistent with the Comprehensive Plan and Land Development Code (LDC) once the LDC is amended to allow development of annexed lots less than one acre in size. The amendment will allow consistency with the Town's historic development pattern provided development does not exceed two (2) residential units per gross acre.

Subject Property Information

Size: Nine parcels (proposed to be annexed into the Town) will be added to four parcels currently in the Town limits, for a total project size of 67.57 acres.

Location: 16819 Heatherwood Lane, Montverde, FL. 34756

Alternate Key No.'s:

Lake County Parcels: 1037247, 1592038, 1592054, 1592071, 1592089, 1814120, 3809249, 1592020, and 1592101.

Montverde Parcels: 1066557, 1066263, 2615346, and 1037212.



Existing Future Land Use Designations:

Lake County – Rural Transition & Bella Collina

Town of Montverde – Single Family Residential (+/- 58 acres)

Proposed Future Land Use Designation:

Town of Montverde – Single Family Residential (+/- 68 acres)

Existing Zoning District:

Lake County – Light Industrial (LM), Agriculture (A), and (PUD)

Town of Montverde – Single Family Low Density (R1L)

Proposed Zoning District: Montverde Single Family Residential (PUD)

Adjacent Property Land Use

Direction	Zoning	Existing Use	Comments
North	R1M and R1L	Residential	Within Town Limits
East	Bella Collina	Residential	Lake County
South	Bella Collina	Residential	Lake County
West	Bella Collina	Residential	Lake County

R1M: Single Family Medium Density

R1L: Single Family Low Density

Existing and Proposed Development Standards - Zoning District

	Zoning District	Maximum Density/ Intensity	Maximum ISR	Minimum Open Space
Existing Lake County	LM & A	NA	70%	N/A
Proposed	Montverde Single Family Residential PUD	1.68 DU/Acre	40%	40%



Background Information

On November 12, 2025, the Planning & Zoning Board recommended approval of this Ordinance 2025-60.

In April of 2025, Ordinances 2025-46, 2025-47, 2025-48, and 2025-49 were presented to P&Z and Town Council (first hearing) for the annexation of nine parcels from Lake County into the Town of Montverde.

In 2005, Ordinance 2005-01 amended the Town of Montverde Zoning Map from Agriculture to Single Family Low Density for the +/- 58 acres identified in this report.

The Second Reading of the annexation ordinance will be heard concurrently with the Second Reading of the proposed Small-Scale Comprehensive Plan Amendment and the PUD zoning ordinance. In order to receive approval of Ordinance 2025-61 (PUD Zoning), a Town of Montverde LDC amendment must be approved to allow development of annexed lots that are less than one acre in size. If granted, the +/- 10 acres proposed for annexation will be unified with the +/- 58 acres (already within town limits) for a total of +/- 68 acres which are planned to be developed into a 114-lot, gated neighborhood.

Staff Analysis

- 1) LDC Sec. 10-9 Stipulates additional review criteria for a proposed rezoning application that the Town must consider in its evaluation for approval. Each of these are discussed below:
 - a) **The need and justification for the change-** The applicant has provided a conceptual plan that shows development consistent with Single-Family Low-Density land use.
 - b) **The effect of the change, if any, on the particular property and on surrounding properties-** the rezoning to Single Family Residential PUD for this property will enable the applicant to develop the property as set forth in the PUD ordinance. The proposed rezoning would provide a housing density that complements the surrounding residential R1L and R1M zoned properties. Please see the attached Rezoning Map that show the relationship of this property to the surrounding zoning districts.



- c) **The amount of undeveloped land having the same classifications as that requested in the general area and throughout the town-** there is limited land for PUDs in the Town. The historic area of the Town is developed with lots less than 0.5 acre in size. The rezoning provides the Town with the opportunity to be consistent or better with the type of residential properties available throughout the Town and negotiate the best possible outcome for a mutually beneficial community.
- d) **The relationship of the proposed amendment to the purposes of the Town's Comprehensive Plan, with appropriate consideration as to whether the proposed change will further the purposes of this LDC and the Plan-** as identified in c) above, the Rezoning is consistent with residential properties throughout the Town. It also is consistent with the Comprehensive Plan policies regarding residential development:
- e) **The availability and provision of adequate services and facilities-** the developer will build a new sewer system and will hook into the Town's potable water service.
- f) **The impact on the natural environment-** the Town's comprehensive plan requires a minimum 25% open space and the proposed amount of open space is 40%.
- g) **Other criteria as may be applicable-** Approval of the Rezoning and the Preliminary Development Plan allows the developer to move forward to the next stage of planning which is the Final Development Plan.

Sec. 10-56(c). PUD—Planned unit development district.

Site development standards. Unless modified as provided for herein, the standards of conventional zoning districts and the design standards of this LDC shall apply. Revised standards may be approved for a PUD project to encourage creative development when the development proposal demonstrates increased protection of natural resources, improved living environment or increased efficiency of service delivery.



- (1) The project meets the required minimum size of ten acres.
- (2) The project meets the site development standards established for planned unit developments in order to ensure adequate levels of light, air and density to maintain and enhance locally recognized values of community appearance and design, to promote functional compatibility of uses, to promote the safe and efficient circulation of pedestrian and vehicular traffic, to provide for the orderly phasing of development and otherwise protect the public health, environment, safety and general welfare.
- (3) Under current entitlements, the applicant had the option to develop the property under the Single Family Low-Density (R1L) zoning designation. In this scenario, they would not be required to install a landscape buffer, provide increased protection of natural resources, provide a minimum amount of open space, provide an improved living environment, and other mutually beneficial aspects of developing under the PUD designation.

Sec. 10-56(d). PUD—Planned unit development district.

Approval procedures. The review outlined in chapter 6 of this LDC shall be followed for first a preliminary development plan and then a final development plan, which shall be adopted by ordinance. The two steps are designed to allow the applicant to gain review and approval of general concepts prior to the preparation of detailed plans. Subdivision plans and/or site plans are required for each separate section of the PUD.

Preliminary development plan. The applicant has submitted a preliminary development plan with the applications for Small Scale Comp Plan Amendment and Rezoning/PUD. Staff has reviewed the preliminary development plan and provided comments to the applicant. The applicant has requested waivers from the Town's *Neighborhood Standards and Guidelines Manual for New Subdivisions*. These waivers and other requirements for approval have been addressed in Ordinance 2025-61 – Montverde Single Family Residential PUD.



LDC Sec 1-2 – Definitions and rules of construction

Density means a ratio of dwelling units per base site area.

Density, residential, means the number of residential dwelling units permitted per gross acre of land and is determined by dividing the number of units by the total area of land within the boundaries of a lot or parcel, preservation and undevelopable areas, or areas below the normal high-water line of a lake. In the determination of the number of residential dwelling units to be permitted on a specific parcel of land, a fractional unit shall not entitle the applicant to an additional unit.

Staff used these definitions in the analysis of this application.

Public Comment

(1) Letter received from a Magnolia Terrace resident regarding the size of buffer.

Town Council Motion Considerations **Quasi-Judicial Actions**

1. **Recommend approval** of Ordinance 2025-61.
2. **Recommend denial** of Ordinance 2025-61. [Provide specific reasons for recommendation of denial.]
3. **Continue action** of Ordinance 2025-61 pending additional information requested by the Town Council. [Provide specific additional information requested.]



Town of Montverde – Future Land Use Map

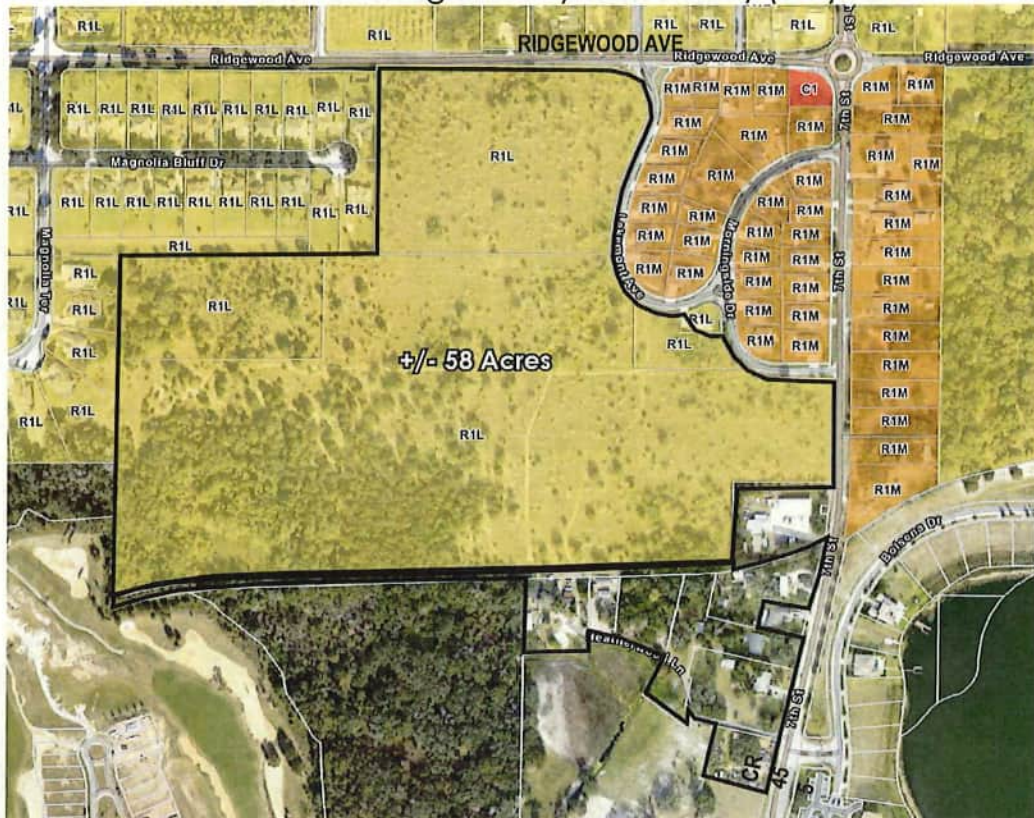
Current: Montverde Single Family Low Density (SFL)





Town of Montverde – Current Zoning Map

Montverde Single Family Low Density (R1L)





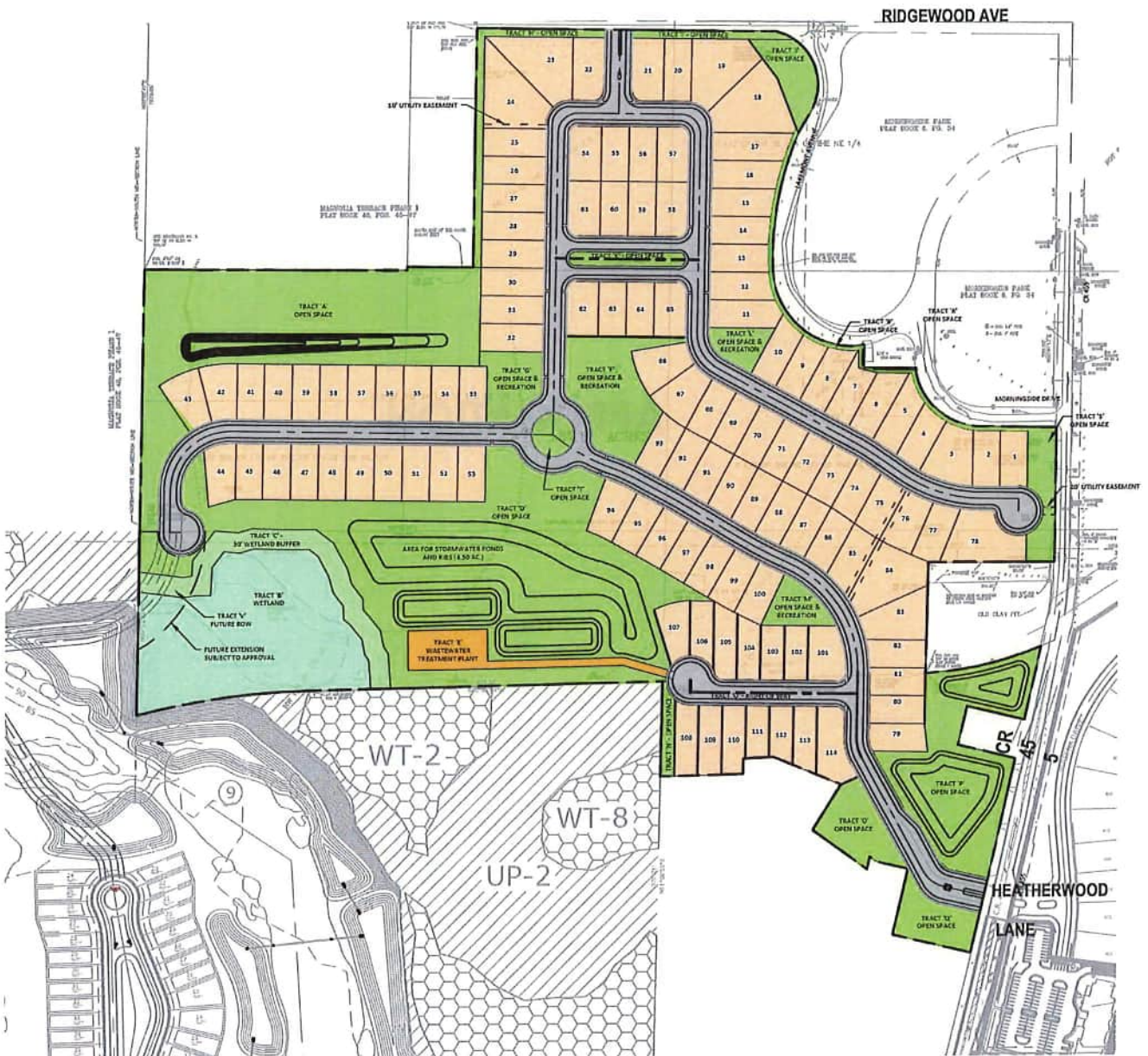
Town of Montverde – Proposed Zoning Map

Montverde Single Family Residential PUD





Proposed PUD Concept Plan



114 Lots – Gated Subdivision



APPLICATION

Town of Montverde Rezoning Process

Submittal Requirements

Five (5) initial copies of the following (additional copies will be required after the final review completed):

- Proof of ownership
- Owners Affidavit and of applicable Applicant Affidavit
- Completed application
- Survey, including legal description of property and street / road address
- Requested land use designation and zoning
- Method of providing services including water, sanitary sewer, roads, drainage, schools, and police protection
- A Concurrency Application
- Additional Studies or Information per Town request

Processing

- All applications are received by the Town Clerk and forwarded to the Planning Consultant, Town Attorney and Town Engineer for review of code compliance and completeness.
- At the time of review the Town may request additional information to analyze impacts.
- The Clerk must forward the consultant comments to the applicant.
- Once the application is complete and there are no major issues, the consulting planner will forward the information to Town Attorney for preparation of Ordinance.
- The Clerk shall inform the applicant of meeting dates.

Advertising/Notices

- Notice to surrounding property owners within 300 ft at least 2 weeks prior to P&Z through certified mail read receipt.
- 1st advertisement should run prior to P&Z and 7 days prior to first public hearing. The second ad must be placed at least 5 days prior to the second public hearing.
- Ads must contain location map.
- All cost incurred by notification/advertising/posting shall be paid by the applicant

Hearings

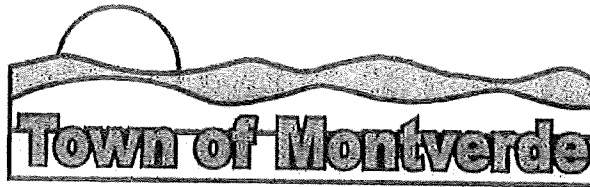
- P & Z Committee (4th Wednesday of each Month) – Recommendation to Council
- Town Council Meeting (2nd Tuesday of Month) – 1st Reading
- Town Council Meeting (2nd Tuesday of next Month) - 2nd Reading

Processing After Approval

- Record Ordinance

Fees

- The applicant will pay in full for cost incurred through consultant review, attorney's fees advertising and notification.



REZONING APPLICATION

Tax identification # List attached

1. Owner's Name: Wilmington Development Services, Inc. and DCS Real Estate Investments, LLC
Mailing Address: 505 S. Flagler Dr., Ste. 900, West Palm Beach, FL 33401
Telephone #: _____
2. Applicant's Name: Jonathan P. Huels, Esq., Lowndes
Mailing Address: 215 N. Eola Dr., Orlando, FL 32801
Telephone #: 407-418-6483
3. Applicant is: Owner ☐ Agent ☒ Purchaser ☐ Lessee ☐ Optionee ☐
(If other than the owner, please attach owner's affidavit)
4. Property Address/Location: See parcel list attached.
5. Legal Description of Property to be rezoned: See attached.
6. The property is located in the vicinity of the following streets:
West and North of C.R. 455, South of Ridgewood Ave. and East of Bella Collina West (Golf Course)
7. Area of Property: _____ Square feet 67.78 acres Acres
8. Utilities: Central Water ☐ Central Sewer ☐ Well ☒ Septic Tank ☒
9. Existing zoning of property: (City) SFL and (County) LM and A
10. Requested zoning of property: PUD
11. Number, square footage and present use of the existing structures on the property;
Vacant residential
12. Proposed use the property: Residential
13. Has any land use application been file within last year in connection with this property?
XX Yes ☐ No. If yes, briefly describe the nature of the request:
Annexation and small scale comprehensive plan amendment

Applications shall include a legal description of the property, sketch or survey of the property, Proof of ownership and authorization from If represented by an agent or contract purchaser. If the rezoning request is not consistent with the Future Land Use classification, a Comprehensive Plan Amendment must be approved prior to the rezoning.

I certify that the statements in this application are true to the best of my knowledge.

A handwritten signature in blue ink, appearing to read "David P. Mat", is written over a horizontal line.

Signature of Applicant

APPLICANT'S AFFIDAVIT


STATE OF FLORIDA
COUNTY OF ~~XXXX~~ ORANGE

Before me, the undersigned authority personally appeared
Jonathan P. Huels, Esq., who being by me first duly sworn on oath, deposes
and says:

- (1) That he affirms and certifies that he understands and will comply with all ordinances, regulations and provisions of the Town of Montverde, Florida, and that all statements and diagrams submitted herewith are true and accurate to the best of his/her knowledge and belief, and further, that this application and attachments shall become part of the Official Records of the Town of Montverde, Florida, and are not returnable.
- (2) That the submittal requirements for the application have been completed and attached hereto as part of this application.
- (3) That the applicant desires approval of:
annexation, small scale comprehensive plan amendment and rezoning


Affiant (Applicant's Signature)

The foregoing instrument was acknowledged before me this 14th day of MAY, 2025,
by Jonathan P. Huels, who is personally known to me or who has produced
_____ as identification and who did (did not) take an oath.


Notary Public



KATHRYN E. JOHNSTON
Notary Public
State of Florida
Comm# HH454552
Expires 11/13/2027

OWNER'S AFFIDAVIT

**STATE OF FLORIDA
COUNTY OF LAKE**

Before me, the undersigned authority personally appeared Wilmington Development Services, Inc. who being by me first duly sworn on oath, deposes and says:

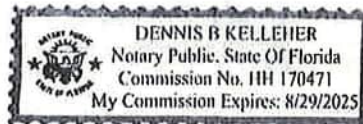
- (1) That he is the fee-simple owner of the property legally described on page one of this application.
- (2) That he desires approval for
Annexation, Large Scale Comprehensive Plan Amendment and Rezoning
- (3) That he has appointed Jonathan P. Huels, Esq. and Lowndes to act as agent in his behalf to accomplish the above. The Owner is required to complete the APPLICANT'S AFFIDAVIT of this application if no agent is appointed to act in his stead.

WILMINGTON DEVELOPMENT SERVICES, INC.,
a Delaware corporation

[Signature] PRESIDENT
Affiant (Owner's Signature)
By: Paul G. Simonson, President

The foregoing instrument was acknowledged before me this 12TH day of MARCH, 2025, by Paul G. Simonson, who is personally known to me or who has produced _____ as identification and who did (did not) take an oath.

[Signature]
Notary Public



NOTE

All applications shall be signed by the owner of the property, or some person duly authorized by the owner to sign. This authority authorizing a person other than the owner to sign must be attached.

OWNER'S AFFIDAVIT

**STATE OF FLORIDA
COUNTY OF LAKE**

Before me, the undersigned authority personally appeared DCS Real Estate Investments, LLC who being by me first duly sworn on oath, deposes and says:

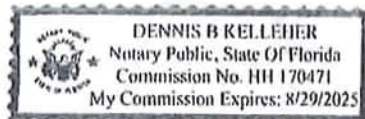
- (1) That he is the fee-simple owner of the property legally described on page one of this application.
- (2) That he desires approval for
Annexation, Large Scale Comprehensive Plan Amendment and Rezoning
- (3) That he has appointed Jonathan P. Huels, Esq. and Lowndes to act as agent in his behalf to accomplish the above. The Owner is required to complete the APPLICANT'S AFFIDAVIT of this application if no agent is appointed to act in his stead.
DCS REAL ESTATE INVESTMENTS, LLC
By: DCS INVESTMENT HOLDINGS GP II, LLC

[Signature] MANAGER
Affiant (Owner's Signature)
By: Paul G. Simonson, Manager

The foregoing instrument was acknowledged before me this 12th day of MARCH, 2025, by Paul G. Simonson, who is personally known to me or who has produced _____ as identification and who did (did not) take an oath.

DK

Notary Public



NOTE

All applications shall be signed by the owner of the property, or some person duly authorized by the owner to sign. This authority authorizing a person other than the owner to sign must be attached.

TOWN OF MONTVERDE
REZONING
PARCEL LIST

CITY PARCELS

ALTKEY	ACREAGE	PARCEL ID	PARCEL ADDRESS	OWNER	CURRENT #	CURRENT ZONING:	PROPOSED ZONING
1037212	11.1809	11-22-26-0001-000-00700	Lakemont Ave.	DCS Real Estate Investments, LLC		R1L	PUD
1066557	4.996	11-22-26-0001-000-00900	Magnolia Terrace Blvd.	DCS Real Estate Investments, LLC		R1L	PUD
1066263	41.0748	11-22-26-0001-000-01000	Morningside Dr.	DCS Real Estate Investments, LLC		R1L	PUD
2615346	1.0626	11-22-26-0200-00C-00100	Morningside Dr.	DCS Real Estate Investments, LLC		R1L	PUD
	58.3143	TOTAL CITY ACREAGE					

TOWN OF MONTVERDE
COMPREHENSIVE PLAN AMENDMENT AND REZONING
PARCEL LIST

ALTKEY	ACREAGE	PARCEL ID	PARCEL ADDRESS	OWNER	CURRENT FLU:	CURRENT ZONING:	PROPOSED ZONING
1037212	11.1809	11-22-26-0001-000-00700	Lakemont Ave.	DCS Real Estate Investments, LLC		R1L	PUD
1066557	4.996	11-22-26-0001-000-00900	Magnolia Terrace Blvd.	DCS Real Estate Investments, LLC		R1L	PUD
1066263	41.0748	11-22-26-0001-000-01000	Morningside Dr.	DCS Real Estate Investments, LLC		R1L	PUD
2615346	1.0626	11-22-26-0200-00C-00100	Morningside Dr.	DCS Real Estate Investments, LLC		R1L	PUD
	58.3143	TOTAL CITY ACREAGE					
3809249	0.054976	11-22-26-0004-000-04200	Heatherwood Lane	Wilmington Development Services, Inc.	Lake Co.-RT	Lake Co-LM	PUD
1814120	1.009303	11-22-26-0004-000-03500	16819 Heatherwood Lane	Wilmington Development Services, Inc.	Lake Co.-RT	Lake Co-A	PUD
1592071	0.356161	11-22-26-0004-000-02809	16801 Heatherwood Lane	Wilmington Development Services, Inc.	Lake Co.-RT	Lake Co-LM	PUD
1592089	1.144609	11-22-26-0004-000-02802	16739 Heatherwood Lane	Wilmington Development Services, Inc.	Lake Co.-RT	Lake Co-LM	PUD
1592101	0.783333	11-22-26-0040-000-02805	16309 C.R. 455	Wilmington Development Services, Inc.	Lake Co.-RT	Lake Co-LM	PUD
1592020	1.579053	11-22-26-0004-000-02807	16333 C.R. 455	Wilmington Development Services, Inc.	Lake Co.-RT	Lake Co-LM	PUD
1592054	1.921805	11-22-26-0004-000-03600	16345 C.R. 455	Wilmington Development Services, Inc.	Lake Co.-RT	Lake Co-LM	PUD
1592038	1.243621	11-22-26-0004-000-02801	16411 C.R. 455	Wilmington Development Services, Inc.	Lake Co.-RT	Lake Co-LM	PUD
1037247	1.378578	11-22-26-0004-000-10000	Old Railroad Site	DCS Real Estate Investments, LLC	RT/LM	Lake Co-LM	PUD
	9.47144	TOTAL COUNTY ACREAGE					
	67.78574	TOTAL COMBINED ACREAGE					

**SMALL-SCALE COMPREHENSIVE PLAN AMENDMENT
AND REZONING
PROPOSED INFRASTRUCTURE AND SERVICE
Montverde Estates**

Potable Water and Fire Protection Water:

As the property is within the City Limits and the service area of the City of Montverde, the property will access existing water lines located on CR 455 and on Ridgewood Ave. The project will include a looped water line with interconnection to existing water mains on both Ridgewood Ave. and at the CR 455 / Morningstar Drive intersection.

Wastewater Service:

Proposed development will be serviced by an onsite central sewer facility.

Roads and Drainage:

The roadways and drainage system within the property will be owned and maintained by the Private Homeowners / Property Owners Association.

Police and Emergency Services:

The property will be served by Lake County and / or City of Montverde Police and Emergency Services per existing areas of service and cooperative service agreements may require.

Schools:

School age students within the community will be eligible for enrollment in Lake County Public Schools.

**SMALL SCALE COMPREHENSIVE PLAN AMENDMENT
AND REZONING
JUSTIFICATION STATEMENT
(Revised)
Montverde Estates**

1. General Data

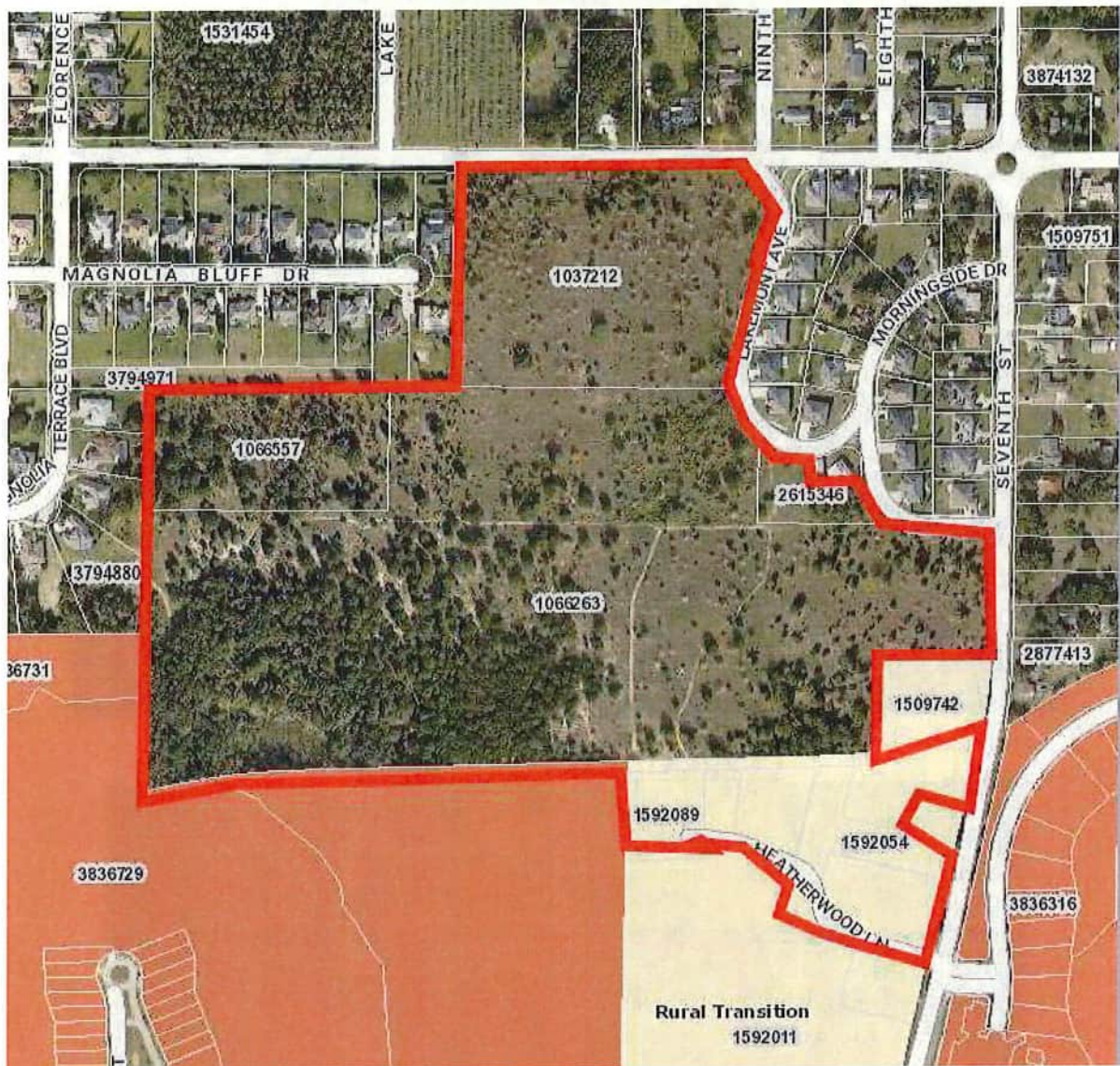
The Subject Property is located in the Town of Montverde, Florida containing approximately 67.78578 acres and generally located in the Montverde area south of Ridgewood Road and west of Seventh Street. An Annexation application has been filed for a portion of the Subject Property consisting of parcels identified as AltKey numbers 3809249, 1814120, 1592071, 1592089, 1592101, 15892020, 1592054, 1592038 and 1037247 (the "Annexation Property"). A Small Scale Comprehensive Plan Amendment is being filed for the Annexation Property (the "Comprehensive Plan Amendment"). Concurrently with the Comprehensive Plan Amendment, a Rezoning application is being filed for the Annexation Property and the following parcels that are currently within the jurisdictional boundaries of the Town identified by AltKey numbers 1037212, 1066557, 1066263, 2615346, (the "Town Property"; together with the Annexation Property, the "Subject Property").

The Comprehensive Plan Amendment and Rezoning will be processed so that they will become effective concurrent with the annexation of the Annexation Property within the jurisdictional boundaries of the Town.

2. Proposed Change

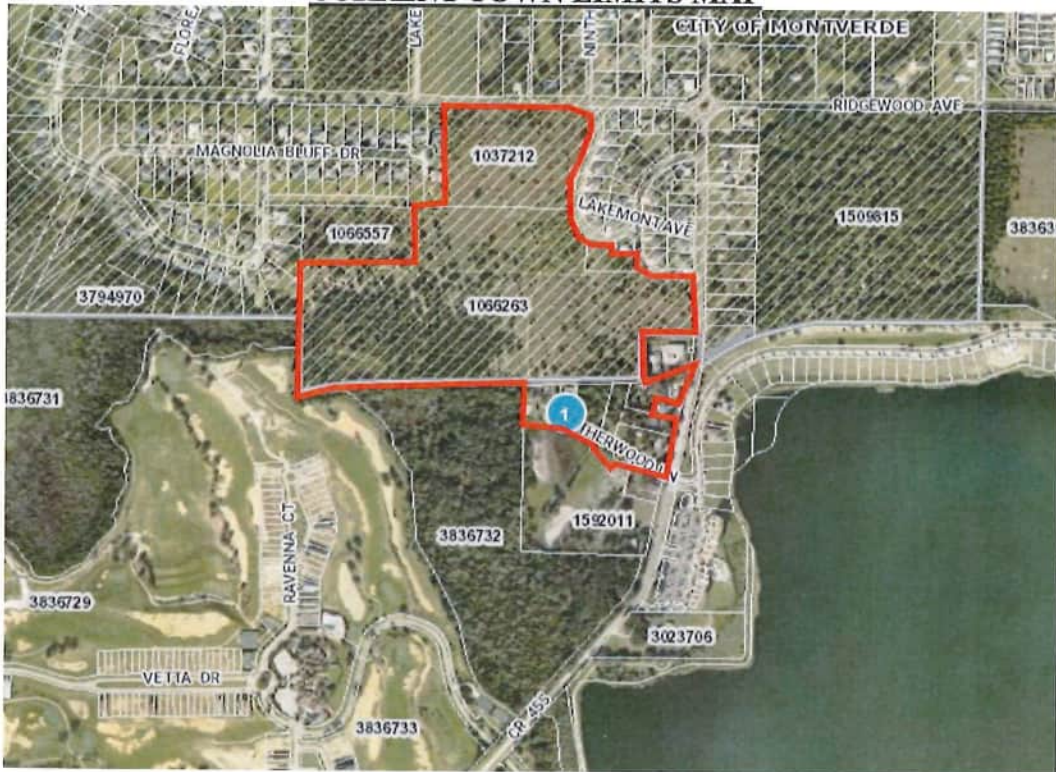
The Comprehensive Plan Amendment is requesting to change the future land use map to change the future land use designations of the Annexation Property from Lake County Rural Transition (RT) to Town of Montverde Planned Unit Development (PUD) (the "Comprehensive Plan Amendment").

LAKE COUNTY FUTURE LAND USE MAP

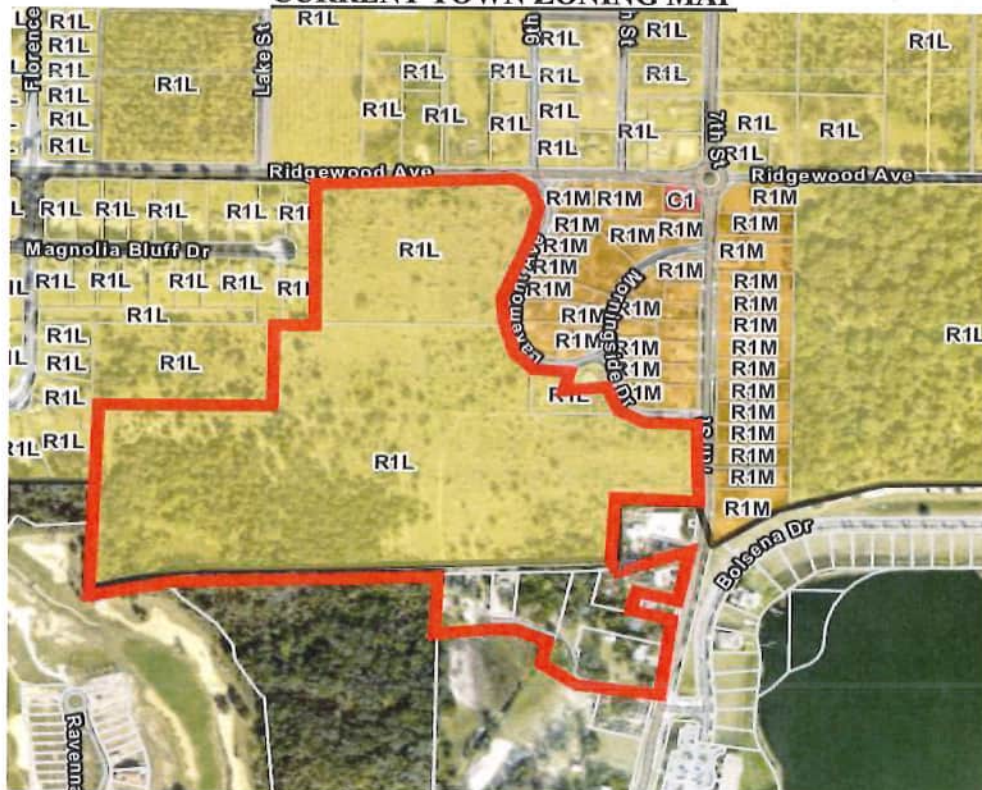


Concurrently with Comprehensive Plan Amendment, the Rezoning application is being submitted seeking to unify the zoning from R1L (Town Single Family Low Density) for the Town Property and LM (County Light Industrial) and A (County Agriculture) for the Annexation Property to PUD (Town Planned Unit Development).

CURRENT TOWN LIMITS MAP



CURRENT TOWN ZONING MAP



LAKE COUNTY ZONING MAP



3. Benefit of Proposed Change

The Subject Property is currently vacant residential or undeveloped parcels located north and east of the Bella Collina. The proposed Comprehensive Plan Amendment and Rezoning would allow the Subject Property to be developed as a master planned single family residential community consisting of 114 homes with dedicated open space and amenities.

4. Compatibility with Land Use

The proposed Comprehensive Plan Amendment and Rezoning is compatible with the surrounding area. The proposed master planned residential community is consistent with the adjacent residential land uses including Magnolia Terrace and Morningside Park Subdivisions. The Bella Collina community lies adjacent property and south of Subject Property and includes residential and commercial uses.

5. Infrastructure and Services

Potable Water and Fire Protection Water: Upon approval of the annexation, the entire Subject Property will be within the Town Limits and the service area of the City of Montverde, the property will access existing water lines located on CR 455 and on Ridgewood Ave. The project will include a looped water line with interconnection to existing water mains on both Ridgewood Ave. and at the CR 455 / Morningstar Drive intersection. The property will receive wastewater service through a central wastewater plant located onsite.



Roads and Drainage: The roadways and drainage system within the Subject Property will be owned and maintained by the Private Homeowners / Property Owners Association.

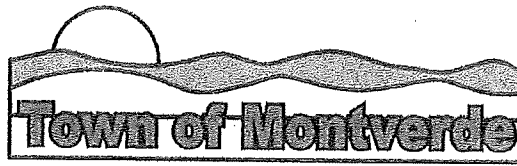
Police and Emergency Services: The Subject property will be served by Lake County and / or City of Montverde Police and Emergency Services per existing areas of service and cooperative service agreements may require.

Schools: School age students within the community will be eligible for enrollment in Lake County Public Schools.

Impact on Natural Environment: Subject Property is currently partially wooded undeveloped pastureland and also includes existing rural residential homes that will be redeveloped consistent with design standards of the R1L zoning regulations and the Town of Montverde Neighborhood Standards & Guidelines Manual for New Subdivisions with minimal variances the comply with Florida Engergy Efficiency Code for Buildings the SJRWMD and the Bella Collina Property Owners Association Architectural Control Board ("ACB"). These new single-family homes will be connected to a central water / sewer system reducing contamination of nearby water bodies from agricultural runoff and leaking septic tanks. Open space with be provided with conservation easements, upland buffers and passive open space as well as stormwater ponds to ensure protection of the natural environment. Landscaping including trees, shrubs and grass with comply with materials and design specifications set forth in the ACB Guidelines, Rules and Regulations to safeguard wildlife habitats and the natural environment.

6. Conclusion

The Applicant requests an amendment to the Montverde Comprehensive Plan to change the existing FLU designations for the Annexation Property from County Rural Transition and a concurrent rezoning of the entire Subject Property to unify the zoning designations for the Annexation Property from County Light Industrial/Agriculture and the Town Property from Montverde R1L(single family low density) to Montverde PUD. The PUD will establish specific design and performance criteria for a master planned residential community consisting of 114 detached single-family homes with dedicated open space and amenities at a maximum density of 2 du/acre (gross) to ensure compatibility with the surrounding neighborhoods.



TOWN OF MONTVERDE
Concurrency Management Review System

1. Owner's Name: Wilmington Development Services, Inc./DCS Real Estate Investments, LLC
Address: 505 S. Flagler Dr., Ste. 900, West Palm Beach, FL 33401
Phone: _____
2. Applicant's Name: Jonathan P. Huels, Esq., Lowndes
Address: 215 N. Eola Dr., Orlando, FL 32801
Phone: 407-418-6483

(A notarized letter of authorization to act on the behalf of the owner must be submitted if the applicant is not the owner.)

PROPERTY INFORMATION

Project Name: Montverde Estates
Project Address: See attached parcel list.
Tax Identification Number: See attached parcel list.
In addition, attach a copy of the site's legal description.
Gross Acreage: 67.78574 ac. Area of Development: 9.47 acres
Existing Zoning: LM and SFL (County) Existing Land Use: Vacant residential; non-agricultural
Proposed Zoning: PUD Proposed Land Use: R1L
Existing Use on Site: Undeveloped land
Proposed Use on Site: Single family detached houses

Is concurrency application related to a specific project? xx YES _____ NO

Have plans been submitted for this project? _____ YES xx NO

Please indicate what type of project is being submitted:

[] Conceptual Review:

_____ Plan Amendment	_____ Rezoning
_____ Preliminary Subdivision	_____ Preliminary Site Plan
_____ Amendment to Future Land Use	_____ Conditional Use
_____ Preliminary Development Plan	

[X] Preliminary Development Review:

<u>xx</u> Plan Amendment *	_____ Rezoning
_____ Preliminary Subdivision	_____ Preliminary Site Plan

* Proposed text amendment to allow for the development of 136 single family residential homes at a maximum density of 2 du/acre (gross).

XX Amendment to Future Land Use _____ Conditional Use

 Conditional Use

[] Final Development Review:

Final Site Plan

DRI

_____ Change in Use

Final Plan & Plat

Building Permits

Is there a parent project with a previously issued Certificate of Capacity?

_____ YES xx NO

If YES, what is the project name? _____

Certificate Number _____ Expiration Date _____

RESIDENTIAL PROJECTS ONLY:

Total Acreage of Project: 67.785 ac Total Number Dwelling Units: 114 SF units

Proposed.
Month/Year

Total No SF
Units

Total No MF
Units

Phase I:

Use #1

Use #2

Use #3

Phase II:

Use #1

Use #2

Use #3

TRANSPORTATION

All projects must submit a transportation impact study with this application. The methodology for the study must be approved by the Town prior to submittal with the application

The applicant must reapply for this test if a completed plan application is not submitted within sixty (60) days of these test results.

The applicant understands that there are no express, no implied, vested rights granted by the submission of or acceptance by the Town of this application, and only after all of the requirements of this application have been met will the Town of Montverde review this application.

Signature of Applicant

Date

Small Scale Comprehensive Plan

Parcel List

ALTKEY	ACREAGE	PARCEL ID	PARCEL ADDRESS	OWNER	CURRENT FLU:	CURRENT ZONING:	PROPOSED ZONING
3809249	0.05497565	11-22-26-0004-000-04200	Heatherwood Lane	Wilmington Development Services, LLC	Lake Co.-RT	Lake Co-LM	R1L
1814120	1.00930333	11-22-26-0004-000-03500	16819 Heatherwood Lane	Wilmington Development Services, LLC	Lake Co.-RT	Lake Co-LM	R1L
1592071	0.35616099	11-22-26-0004-000-02809	16801 Heatherwood Lane	Wilmington Development Services, LLC	Lake Co.-RT	Lake Co-LM	R1L
1592089	1.14460929	11-22-26-0004-000-02802	16739 Heatherwood Lane	Wilmington Development Services, LLC	Lake Co.-RT	Lake Co-LM	R1L
1592101	0.78333324	11-22-26-0040-000-02805	16309 C.R. 455	Wilmington Development Services, LLC	Lake Co.-RT	Lake Co-LM	R1L
1592020	1.57905314	11-22-26-0004-000-02807	16333 C.R. 455	Wilmington Development Services, LLC	Lake Co.-RT	Lake Co-LM	R1L
1592054	1.92180506	11-22-26-0004-000-03600	16345 C.R. 455	Wilmington Development Services, LLC	Lake Co.-RT	Lake Co-LM	R1L
1592038	1.24362147	11-22-26-0004-000-02801	16411 C.R. 455	Wilmington Development Services, LLC	Lake Co.-RT	Lake Co-LM	R1L
1037247	1.378578	11-22-26-0004-000-10000	Old Railroad Site	DCS Real Estate Investments, LLC	RT/PUD	Lake Co-LM	R1L
	9.47144014	TOTAL COUNTY ACREAGE					

Sunshine811.com

BOYD CIVIL
ENGINEERING

4816 Hanging Moss Road
Orlando, Florida 32807
Office (407) 943-2493
Cell (407) 943-2493

DATE: 5/15/25
BY: AS SHOWN
PROJECT: 1014.978
DRAWN BY: DOWN BT
CHECKED BY: RT
CHECKED BY: SNB

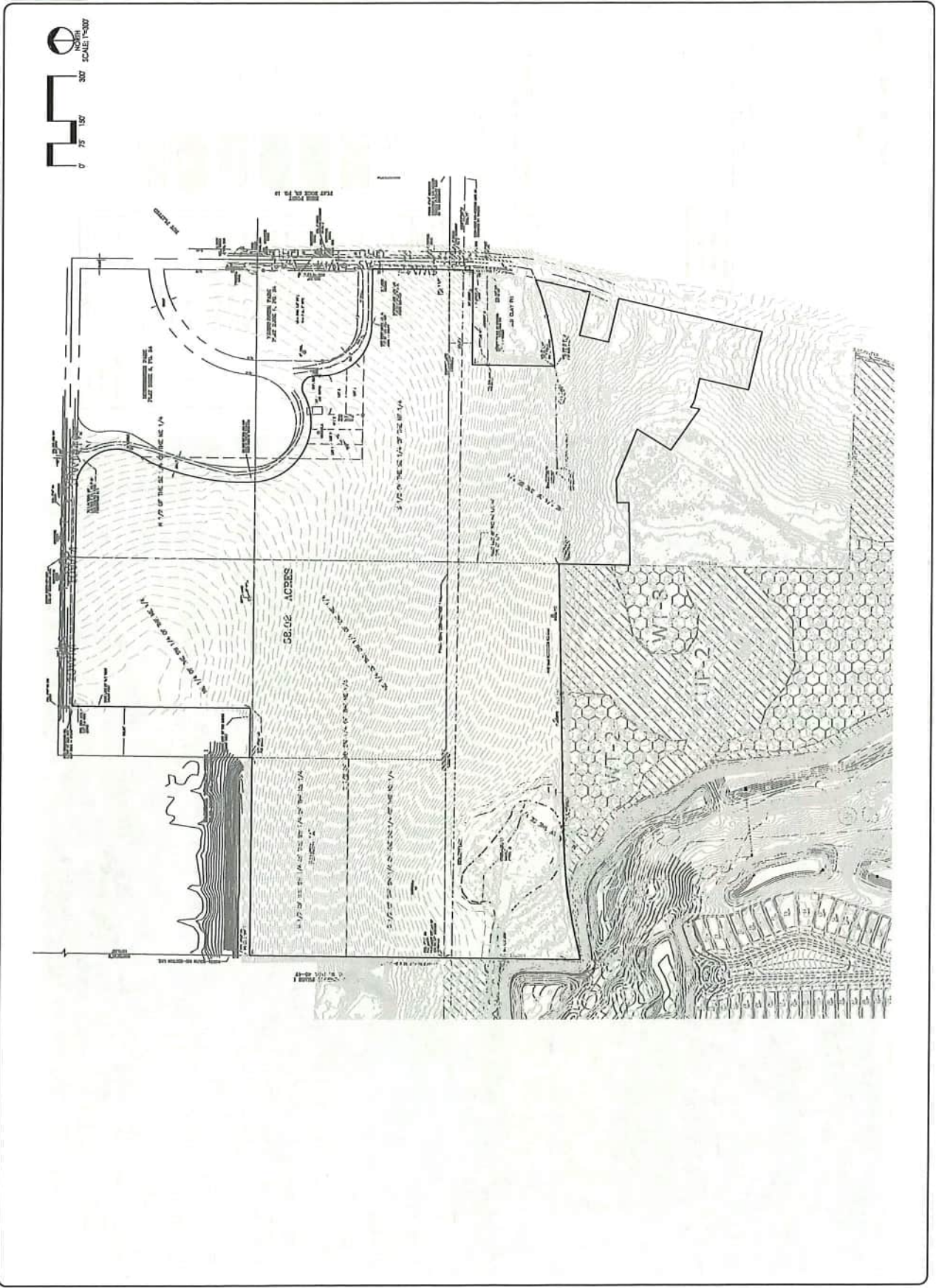
Rev.	Date	Description	Check by

EXISTING CONDITIONS PLAN

MONTVERDE ESTATES

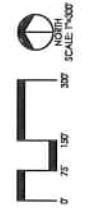
PREPARED FOR: DCI REAL ESTATE INVESTMENTS, LLC
CITY OF MONTVERDE

DATE: 5/15/25
BY: AS SHOWN
PROJECT: 1014.978
DRAWN BY: DOWN BT
CHECKED BY: RT
CHECKED BY: SNB



REV.	DATE	DESCRIPTION
1	05/15/2017	Initial Design
2	06/01/2017	Revised Design
3	06/15/2017	Final Design

PD MASTER SITE PLAN
MONTVERDE ESTATES
 PREPARED FOR: GCS REAL ESTATE INVESTMENT, LLC
 PROJECT NO.: 1014-998
 SCALE: AS SHOWN
 DATE: 5/15/2017
 DESIGNED BY: JET
 CHECKED BY: SJB



Total Area	67.82
Minimum Required Common Open Space	10.17
Open Space Provided	27.66
Conservation Area	4.03
Upland Buffer	1.10
Upland Open Space Areas	14.12
Stormwater and RIB Areas	8.61
Total	27.66
Total Residential Lot Area	29.22
Wastewater Facility Area	0.67
Road Right of Way	9.97
Maximum Number of Residential Lots	114 Units
Maximum Gross Density	1.68 DU / Acre
Maximum Impervious Area (over entire PD)	47%

Retaining Walls:
 Site will include retaining walls of varying height. retaining walls may be located within 10 ft. of the project perimeter and / or within lot/back areas. Wall heights will be determined of final engineering.

Walls within residential lots shall be decorative spill face interlocking block walls.

Area Tabulations		
Tract	Type	Area (ac.)
A	Open Space	5.45
B	Wetland	4.03
C	50' Wetland Buffer	1.10
D	Open Space	8.61
E	Wastewater Treatment Plant	0.67
F	Open Space	1.25
G	Open Space	0.52
H	Open Space	0.42
I	Open Space	0.43
J	Open Space	0.27
K	Open Space	0.28
L	Open Space	0.75
M	Open Space	0.33
N	Open Space	0.16
O	Open Space	0.43
P	Open Space	2.62
Q	Open Space	0.52
R	Open Space	0.29
Residential	N/A	29.22
R/W Area	N/A	9.97
Total	N/A	67.82

LEGEND

- RECREATIONAL LOTS
- OPEN SPACE TRACT AREA
- WETLAND TRACT AREA
- WETLAND BUFFER TRACT AREA
- WASTEWATER TREATMENT PLANT
- R/W AREA



VARIANCES FROM THE TOWN OF MONTVERDE NEIGHBORHOOD STANDARDS
& GUIDELINES MANUAL FOR NEW SUBDIVISIONS

- SECTION IV(B): HOUSING MODEL / STYLE VARIETY
- Each development of 50 or more homes shall have at least seven (7) models with at least three (3) variations and material treatments for each model. Each development of 50 or more homes shall have at least four (4) models with three (3) variations and material treatments for each model which will be individually approved by the Santa Collina Architectural Control Board (the "ACB").
 - No street block should have more than two consecutive single-family homes with the same house model. Home elevations, roof style & color and main house body color schemes shall not be duplicated within four (4) homes of each other, both on the same side of the street and across the street.

ARCHITECTURAL STANDARDS

- General Architectural Standards for all Homes
 - a. Gables and wings shall be no less than two (2) feet deep to function as an energy conservation measure and protect people and the house from bright sunlight. Overhangs and awnings shall be no less than 18 inches in addition to all homes meeting the 2023 Florida Energy Efficiency Code for Buildings.

ARCHITECTURAL STANDARDS

- General Architectural Standards for all Homes
 - e. Garages
 - i. Where lots are 50 ft or less in width, garages must be alley-loaded.
 - ii. A front-loaded lot with side-facing doors must incorporate windows and trim on the wall facing the front street.
 - iii. Front-loaded garage lots must randomly alternate the location of doors (front, side, or rear) to avoid repetition.
 - iv. No more than 25 percent of the lots in proposed subdivision (all phases) are permitted to contain front-loaded garages.
 - v. Garages must be at a minimum 27 ft x 20 ft interior size.

All residential dwellings shall include a garage adequate to park at least two (2) large-sized automobiles. All garages shall be constructed of the same exterior materials and colors as the main structure. Garages shall not be used for any purposes which may prevent the daily use of the garage for the primary purpose of parking at least two (2) operating automobiles. On larger lots as defined by the ACB, garage doors facing the front street will be highly discouraged. Garage doors that face the street shall be of unique design, finish, and material, as specifically submitted to and approved by the ACB. All garage doors must be decorative including the use of glass inserts. Full glass garage doors are permitted with ACB approval. Any garage windows in a garage with visible from the street public right-of-way or adjoining property shall have interior coverings that are consistent with the window coverings inside the house and plantings that are a minimum of 36" tall at maturity for screening from the view of the street and adjacent lots.

- F. STAYING CONNECTED - WALKABLE NEIGHBORHOODS
- Internal Sidewalks - A minimum six (6) foot-wide concrete sidewalk shall be constructed along each side of all streets. Each sidewalk shall be located within and in parallel alignment with the street right-of-way. The back of the sidewalk shall be found contiguous with the right-of-way and property line boundary. Standard right-of-way grade shall provide a maximum elevation of three-quarters inch rise per one foot run, beginning from the back of the curb to the intersection point of the front of the sidewalk. All sidewalks shall have handicapped access at all intersections and be ADA compliant. A minimum five (5) foot-wide sidewalk shall be constructed in Old Castle Applan Napoli concrete pavers along each side of all streets within the gated section of the development. All sidewalks outside of the gated section of the development will require a minimum six (6) foot-wide concrete sidewalk.

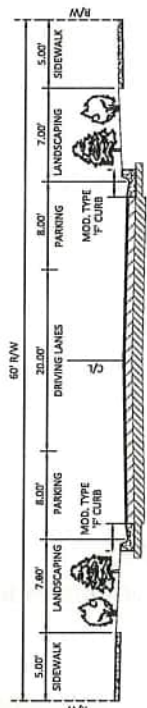
Water Conservation

Consistent with the Town's Comprehensive Plan, for any proposed subdivision having more than 25 lots, non-potable sources for landscape irrigation must be provided. All Owners, Builders and subcontractors are required to abide by the water restrictions when planning, planning and modifying landscaping or irrigation systems. The total area of irrigation may not exceed the allowable area set by the consumptive use permit issued by St. Johns River Water Management District ("SJRWMD"). Each home will have an automatic irrigation system that is monitored and controlled by the Santa Collina Property Owners Association (the "POA"). In an effort to conserve water, SJRWMD has established water conservation requirements for all water usage within the development, which will be enforced by the POA. In order to enforce these water conservation requirements, the POA has developed a list of conditions and restrictions for water usage by owners. If an owner fails to comply with these conditions and restrictions, then the water service to that owner's property shall be terminated and shall remain terminated until owner complies with all conditions and restrictions. All plans and specifications submitted for final approval whether new construction or modification shall include evidence of compliance with the provision. Low volume toilets and showerheads must be incorporated into all residential plumbing systems. In the event that SJRWMD declares a water shortage, all Owners must adhere to the water shortage restrictions issued by SJRWMD. The soil amendments such as Profile and Command soil, or equivalent, shall be incorporated into the cleared portion (plantings and sod) of all residential lots. The application of soil amendments shall conform to the manufacturer's recommendation. St. Augustine grass shall not be planted. Owners shall use drought tolerant Zoyaia or Bahia grass. Micro-irrigation techniques shall be tried in locations where they can be used efficiently, such as in planting bed areas. Irrigation systems shall be zoned according to plant water requirements. Irrigation systems shall be designed to prevent over-irrigating onto impervious surfaces (such as driveways and sidewalks). Irrigation systems shall incorporate an automatic shut-off rain sensor. All residential landscape plans must be certified upon delivery by a Florida registered landscape architect and must be submitted to the ACB for review. All residential landscape plans must be approved by the ACB before commencement of work. All residential landscaping shall comply with the Landscape Materials List and Guidelines and Lot Landscape Specifications set forth in the ACB Guidelines, Rules, and Regulations.

Montverde Estate PD Zoning Standards:

- Permitted uses. The following are permitted uses in this zoning district:
 - Single-family dwelling units having a minimum living area of 2,500 square feet exclusive of garages, and exterior covered or screened areas.
- Lot development standards:

	Lots 1-100	Lots 101-114
Minimum lot size for buildings	9,800 square feet	7,800 square feet
Minimum lot width at building setback	70 feet	60 feet
Minimum street frontage lot width (lot on a corner)	50 feet	50 feet
Maximum lot coverage	65%	65%
Front yard minimum building setback	20 feet	20 feet
Adjacent to SR 455, minimum building setbacks	35 feet	35 feet
Side yard minimum building setback	7 1/2 feet	7 1/2 feet
Side yard at Corner minimum setback	17 1/2 feet	17 1/2 feet
Rear yard minimum setback	20 feet	20 feet
Pool, screen enclosure and / or decking	7 1/2 feet from any property line	7 1/2 feet from any property line
Driveway	3 feet from property line.	3 feet from property line.
Accessory Structures (Rear Yard Only)	7 1/2 feet	7 1/2 feet
AC Pads / pool equipment	7 1/2 feet from any property line	7 1/2 feet from any property line
Maximum building height	Two stories or 35 feet	Two stories or 35 feet
Parking, residential	Minimum of two off-street spaces	Minimum of two off-street spaces



60' TYPICAL STREET R/W

SCALE: NTS

Date	Description	Check By

Date:	5/12/25
Scale:	AS SHOWN
Project:	Montverde Estates
Sheet:	101-A-998
Drawn by:	Boyd
Designed by:	Boyd
Checked by:	Boyd



LOGAN J. OPSAHL

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MAIN NUMBER: 407-843-4600



July 22, 2025

Mr. Paul Larino
Town of Montverde
17404 Sixth Street
Montverde, FL 34756
Email: PaddyD@mymontverde.com

**Re: Z25-000004 – Small Scale Comprehensive Plan – Montverde Estates Expansion
Z25-000005 – Rezoning – Montverde Estates Expansion**

Dear Paul:

With regard to the above referenced applications, we are in receipt of comments dated June 3, 2025 and provide the following responses for your review and consideration:

I. Regarding Small Scale Comprehensive Plan Application Z25-000004 at Heatherwood Lane:

1. The minimum lot size of 9,800 square feet listed on Page 2 of the proposed Montverde Estates Master Plan is inconsistent with the minimum lot size requirement of the Land Development Code (LDC) which requires:

Sec. 10-13. - Lot size.

(a)Minimum. All property annexed into the town after March 7, 2000, that is subsequently used for residential purposes, shall maintain a minimum residential lot size of one acre, except as provided herein. Right-of-way, utility easements and easements of a similar nature, including right-of-way and easements dedicated to the town or other political subdivisions for public purpose, may be included when calculating the size of a lot upon the approval of the town council. All property annexed into the town after March 7, 2000, that is subsequently used for residential purposes and which is located in areas accessible to employment and commercial



areas as well as being located north and west of Blackstill Lake Road may develop residential lots at less than one acre in size, but may not exceed two residential units per gross acre.

This Section of the LDC will need to be revised to remove the minimum lot size of one acre, if the other provisions of the section are not met by this application, before the proposed Comprehensive Plan amendment and Montverde Estates Master Plan/ rezoning application can be formally considered and approved.

RESPONSE: The Land Use Amendment and PUD Zoning allow for standards that differ from the LDC without the need to amend the LDC. The plan clusters lots in a manner that the overall density does not exceed 2 units per acre, per below:

Proposed Density of Entire Project
(including annexation Area):

Area:	67.69 ac.
Units	114 Lots
Density	1.68 DU/ ac.

Density of Area Being Annexed:

Area:	9.2 ac.
Units	9.5 Lots
Density	1.03 DU/ ac.

There are 100 lots that have a minimum width of 70 ft. and minimum depth of 140ft. resulting in a minimum lot area of 9,800 SF.

There are 14 lots that have a minimum width of 60 ft. Of these lots all but two have a minimum depth of 140 ft. All of these lots are located on the southern boundary of the proposed development and are not adjacent to any existing residential properties. The minimum lot area of the 60ft. lots is 7,800 SF.

Additionally, the 55 +/- acre parcel of the Property has been annexed into the Town prior to March 2000 and has vested rights, therefore rendering the above-referenced portion of the LDC inapplicable to the Property.

2. The LDC in Sec. 10-81. - Measurement and determination of setbacks, requires that retaining walls constructed in accordance with Chapter 4, LDC, must adhere to a minimum five-foot side-yard, rear-yard and front-yard setback from the property line. A waiver may be requested for any retaining walls over 6-feet and/or within 5-feet of property lines. Sec 4-52(e) and Sec 10-81. The final proposed height and location of retaining walls must be approved by Town Manager prior to construction.

RESPONSE: Acknowledged. A waiver for a reduction of the minimum setback for placement of retaining walls is being requested. Retaining walls to support overall site development will be located within maintenance easements with the Property Owner Association responsible for maintenance.

Any supplemental walls which may or may not be required to accommodate a building permit on a specific lot that is not included in the infrastructure drawings and approved as part of the infrastructure construction plans, will be designed and permitted by the individual lot builder, as applicable, and will conform to the required 5 ft. setback.

An Additional waiver is being requested for retaining wall heights. The Property has unique topography, with an approximate elevation drop of 100 ft. from north to south with existing slopes of up to 10%. In order to create fully-engineered roads and lots on the Property, retaining walls will be required, with the potential for some walls being up to 20-feet in height. In some locations the elevation change will be accomplished by mechanically stabilized earth slopes in lieu of retaining walls. Engineering designs and plans will be provided with the final site construction plans.

3. A waiver has been requested for sidewalks less than 6-feet in width. Please provide justification of this waiver request.

RESPONSE: Acknowledged. A waiver for a reduction of the minimum sidewalk width has been requested to 5-feet and will be constructed of concrete pavers inside the subdivision as a neighborhood design standard. The Project is a gated subdivision. All sidewalks outside of this subdivision will adhere to the Montverde Neighborhood Design Standards & Guidelines.

4. Maximum lot coverage, minimum lot widths and building setbacks need to be revised to be consistent with the R1L zoning district standards. The lot size will also need to be revised to be consistent with the R1L standards once the LDC is changed as noted in 1 above.

RESPONSE: The intent of the rezoning of the Property to a Planned Development is to allow for the best efficiency and use of the Property. One of the stated purposes of the PUD development

district is to "[p]rovide the maximum opportunity for the application of innovative concepts of site planning." The PUD will allow for lots to be clustered in a manner that the overall density does not exceed 2 units per acre, per below:

**Proposed Density of Entire Project
(including annexation Area):**

Area:	67.69 ac.
Units	114 Lots
Density	1.68 DU/ ac.

Density of Area Being Annexed:

Area:	9.2 ac.
Units	9.5 Lots
Density	1.03 DU/ ac.

There are 100 lots that have a minimum width of 70 ft. and minimum depth of 140ft. resulting in a minimum lot area of 9,800 SF.

There are 14 lots that have a minimum width of 60 ft. Of these lots all but two have a minimum depth of 140 ft. All of these lots are located on the southern boundary of the proposed development and are not adjacent to any existing residential properties. The minimum lot area of the 60ft. lots is 7,800 SF.

The PUD zoning should provide for approval of revised specific standards only applicable to the Project, and as mutually agreeable with Town Staff – without the need for amending the LDC.

5. Pool/Deck/Screen Enclosure/ (Sheet 2 of 2): Please change both side and rear yard setbacks to 7.5'.

RESPONSE: This change is shown on the revised Sheet 2 of 2.

6. Please provide location and detail of a swale to protect the wetland area.

RESPONSE: Tract "C" on Site Plan page 1 of 2 illustrates the 50 ft. buffer created between Tract "B" wetland and Tract "C" open space areas. The final drainage plans and calculations will provide calculations showing that the wetland will be protected from erosion and that all State water quality, quantity, and wetland protection criteria have been met.

7. Identify how the proposed PUD is consistent with the following: Sec. 10-56. – PUD-Planned unit development district.

(a)Description of district. This district is established to:

(1)Provide for planned residential communities containing a variety of residential structures and a diversity of building arrangements, with complimentary and compatible commercial uses. Planned commercial centers with complimentary and compatible residential uses or with complimentary and compatible residential or commercial uses or both, developed in accordance with an approved final development plan.

(2)Allow diversification of uses, structures and open spaces in a manner compatible with existing and permitted land uses on abutting properties.

(3)Reduce improvement costs through a more efficient use of land and a smaller network of utilities and streets than is possible through the application of other zoning districts.

(4)Ensure that development will occur according to the limitations of use, design, density, coverage and phasing stipulated on an approved final development plan. (5)Preserve the natural amenities and environmental assets of the land by encouraging the preservation and improvement of scenic and functional open areas. (6)Encourage an increase in the amount of usable open space areas by permitting a more economical and concentrated use of building areas than would be possible through conventional subdivision practices.

(7)Provide the maximum opportunity for the application of innovative concepts of site planning in the creation of aesthetically pleasing living, shopping, and working environments on properties of adequate size, shape and location. The planned unit development district is permitted within all land use categories shown on the Future Land Use Map of the comprehensive plan.

RESPONSE:

1 and 2 - The proposed development provides for a diversity of lot sizes and product type while maintaining high architectural and site development standards.

3 – The plan creates an efficient site plan, minimizing the route and length of utilities. The plan also provides an interconnected water main loop between CD 455 and Ridgewood Avenue.

4- The plan will be developed in a single phase and in accordance with a final development plan, as required by the LDC.

5- The plan preserves existing conservation areas, provides the required 50' undisturbed upland buffer, and provides an additional 13.9 acres of upland open space.

6-The plan has been developed to cluster lots in smaller concentrated areas allowing larger contiguous open spaces to remain.

7- As outlined above and below the Project provides for innovative concepts that afford maximized open space, clustering of lots and efficient use of the Property. The plans have been revised to reflect these standards.

8. Please provide details of buffers and landscaping as required by LDC Sec. 10-56 (d) (1)(e) for the preliminary plan stage, consistent with LDC Chapter 4, Article VIII.

RESPONSE: Although Section 4-180 does not establish a minimum landscape buffers for PUD's but does require that buffers be addressed within the PUD. Where proposed lots are adjacent to existing residential development, a minimum 10 ft. landscape buffer will be provided.

Open space and buffers are provided on PUD Master Site Plan Sheet 1 of 2 with required and proposed acreages. Proposed buffers have been incorporated into Sheet 2.

9. Please provide the name, location map, legal description, acreage, type of planned unit development, identification of the present ownership and the developers of the project as required by LDC Sec. 10-56 (d) (1) (a);

RESPONSE: The proposed subdivision is an expansion of Montverde Estates with information required by LDC Section 10-56(d)(1)(a) on the revised PUD Master Site Plan.

10. Please provide the existing topography and other features including lakes, marshes or swamps, USGS map-acceptable watercourses, soils, and a general description of the vegetation, as required by LDC Sec. 10-56 (d) (1) (c) for the preliminary plan stage.

RESPONSE: The topographical, soils and vegetation map are provided with the revised PUD Master Site Plan.

11. Please identify if there is one phase of development. If there are multiple, please identify phasing plan.

RESPONSE: This development will be constructed in one phase.

12. Please provide projected arterial and collector roadway traffic generation data and analysis as required by LDC Sec. 10-56 (d) (1) (g) for the preliminary plan stage.

RESPONSE: A Traffic Study is included with this resubmittal.

13. Maximum Impervious Surface Ratio (ISR) of 50% is required. Please add a notation indicating this ISR is measured on a per lot basis.

RESPONSE: Maximum ISR notation has been added to the PUD Master Site Plan.

14. Page1 of the Montverde Estates Master Plan lists an incorrect open space requirement of 15%. This should be 25%. Please revise.

RESPONSE: The minimum open space requirement shown on the PUD Master plan has been corrected to show the 25% requirement. The plan exceeds the minimum requirement, providing a total open space area of 41%

15. Please add to the proposed development standards that AC pads and pool equipment shall not be located within easements.

RESPONSE: The note that AC pads and pool equipment shall not be located within easements has been added to the PUD Master Site Plan and will comply with the Property Owners Association Architectural Control Board ("ACB"). If this note was intended to say "shall not be located within setbacks" the site plan will be further revised.

16. Revise all references to PUD to say PUD consistent with Montverde LDC terminology.

RESPONSE: References to PUD have been changed to PUD for consistency with Montverde LDC terminology.

17. On-Site Recreation Areas: The Comprehensive Plan requires new residential subdivisions to provide recreation space for residents (Policy 1-1.14.1(C) of the Future Land Use Element Please indicate what neighborhood parks, playgrounds, trails, or similar amenities are

proposed. Identify the size and location of these recreation areas on the plan, and ensure they satisfy the policy requirement for on-site recreation space.

RESPONSE: The PUD Plan depicts the anticipated neighborhood parks and other amenities. There are approximately 3.5+ acres of Upland Open Space areas designated as passive parks on the PUD Plan. Specifics as to the types of parks, playgrounds and other amenities will be provided at the Site Plan submittal stage.

18. Transition to Adjacent Neighborhoods: The application asserts the project is compatible with surrounding subdivisions like Magnolia Terrace and Morningside.

RESPONSE: Acknowledged.

19. Please explain in detail how the plan achieves compatibility. Describe any perimeter buffers, larger lot sizes, or open space along the edges adjoining existing homes to provide a gradual transition. Also, address how the design will minimize potential impacts (e.g. lighting, noise) on the Bella Collina property to the south. This information is needed to demonstrate consistency with Comprehensive Plan policies on compatible development.

RESPONSE: The PUD Plan has utilized the existing housing types within the adjacent Magnolia Terrace and Morning side neighborhoods into consideration for compatibility purposes. The Project will be part of the Bella Collina HOA and the product and development are consistent with Bella Collina's lot sizes and architectural requirements.

20. Wastewater Treatment Facility Impacts: The proposal includes a central wastewater treatment plant on-site. This facility is essentially a utility located within a residential PUD. What setbacks and buffering (landscaping or walls) will be provided around the plant to screen it from new and existing homes? Please also describe odor and noise control measures. Ensuring that this utility is inconspicuous and does not adversely affect nearby properties is required for land use compatibility under the Town's codes.

RESPONSE: The plant will meet Florida Department of Environmental Protection requirements for odor control and noise. Placement of the plant was purposeful to place as far as reasonably possible from existing residential lots. The closest residential lot is more than 320 ft. away from the plant, which is sufficient for noise and odor concerns. The perimeter of the plant will include a screen wall, landscape plantings and trees along the perimeter for visual screening.

21. Road Improvements and Traffic: Provide information on traffic volumes expected from 114 homes and any traffic study results. What improvements will be made to Ridgewood Avenue and intersections with CR 455 to handle additional traffic safely? The Town will likely require the developer to pave or widen substandard roads to meet a 24-foot width local standard and install sidewalks where needed. Please outline any off-site roadway improvements (e.g. pavement widening, turn lanes, signage) that you will undertake on Ridgewood or other impacted streets to mitigate traffic from the project.

RESPONSE: Traffic Study is included in this resubmittal. The Traffic Study reveals that off-Site improvements or turn lanes are not required.

22. Pedestrian & Bicycle Connectivity: The Town's subdivision guidelines mandate that new neighborhoods promote internal walking/biking and connect to surrounding areas. Describe the pedestrian and bicycle facilities to be provided. This should include sidewalks (minimum 5–6 ft width) along the internal streets and a sidewalk or trail connection from the subdivision to CR 455 or other nearby public walkways. If a Montverde town trail is planned nearby, land or easement for a trail connection should be provided. Confirm that internal sidewalks will meet ADA standards and that the project will link with schools, parks, or the Town's trail network consistent with policy.

RESPONSE: The Project is designed as a gated community and as an extension of the Bella Collina Development, with a future internal cart path connection planned (subject to additional environmental permitting) to the Bella Collina Clubhouse and other amenities. The development will include 5 ft. sidewalks. Sidewalks outside of the Project will adhere to Town guidelines.

23. Internal Street Design and Traffic Calming: The Neighborhood Standards Manual requires traffic calming measures in all new subdivisions. Please illustrate how the internal street layout will discourage speeding and cut-through traffic. For example, note the inclusion of any traffic circle at the entry, intersection landscaping (which must use low groundcovers under 3 ft for visibility) use of bike-friendly street markings, on-street parking, or other calming features (chicanes, chokers, etc.). All such measures should comply with Town guidelines for residential street design and public safety access.

RESPONSE: The site plan includes changes in alignment and grade along with a central traffic circle. These elements together will promote traffic calming while meeting visibility requirements.

24. School Capacity Coordination: Confirm that you have initiated a school concurrency review with Lake County Schools. While not a Town code requirement per se, the Montverde Comprehensive Plan (Intergovernmental Coordination Element) requires coordination to ensure adequate school facilities. Provide any correspondence or findings from the School District regarding Capacity for new students from this project, or describe the status of obtaining a school Capacity determination.

RESPONSE: A school Capacity determination has been requested from Lake County Schools and responses to Capacity has not yet been received. The Applicant will provide proportionate share mitigation payments if any deficiency in student stations is determined to provide resources to accommodate for school planning.

25. Environmental Assessment: Please provide a current environmental survey or assessment of the property. This report should identify any wetlands, surface waters, floodplain areas, and protected wildlife or habitats on site. Consistency with the Comprehensive Plan's Conservation Element must be demonstrated by showing how significant environmental features will be preserved or impacts mitigated. If gopher tortoise, sandhill crane, or other protected species are known or likely, a management plan and FWC coordination will be required.

RESPONSE: Any environmental impacts (habitat, wetlands or floodplain) will be mitigated consistent with the Montverde Comprehensive Plan Conservation Element and coordinated with FWC and all other applicable agencies. A prior SJRWMD permit was issued for the site not included in the annexation. The Environmental Resource Permit (ERP) will be updated for the current plan and will include the annexation area. Environmental Resource Permitting will address, wildlife, wetland areas, wetland buffers, and stormwater management. This documentation will be provided to the Town at the time final construction plans are prepared. An environmental report has been completed and is included with this resubmittal.

26. Wetlands and Upland Buffers: The master plan shows a designated wetland conservation area and a 50-foot upland buffer (Tract C, "50' Wetland Buffer") around on-site wetlands. Confirm that this 50 ft buffer meets the minimum buffer width required by Town code (it appears consistent with Section 10-90 of the LDC). The buffer must remain undisturbed aside from approved passive uses. Please clarify how this wetland and buffer will be protected in perpetuity (e.g. conservation easement or platted common area). Any stormwater outfalls or infrastructure encroaching into the buffer will need justification, as generally only passive recreation or essential utilities are allowed in buffer zones.

RESPONSE: The required 50 ft. buffer is shown on the PUD Plan and will be identified on the construction plans and final plat, as required by the LDC. Accordingly, the restrictions and

maintenance requirements will be specified on the final plat. The stormwater ponds, outfalls, and wetland buffers will meet State standards through the Environmental Resource Permitting process. The 50ft buffer shown on the PUD Plan is consistent with Lake County requirements and the SJRWMD requirements for the Lake Apopka Basin.

27. Stormwater Management (Low Impact Development): Montverde strongly encourages Low Impact Development (LID) techniques for stormwater management mymontverde.com. Rather than solely using conventional retention ponds, the design should mimic natural hydrology by using distributed micro-retention, swales, pervious pavement, etc. Please describe what LID strategies will be implemented on this site to reduce runoff and increase infiltration. For example, will you incorporate bio-swales or rain gardens in common areas, use pervious pavers for walkways, or preserve natural pervious surfaces beyond the required open space? Demonstrating incorporation of LID will show consistency with the Town's Water Resource Protection guidelines. Also confirm that the stormwater system will meet St. Johns River Water Management District criteria and Town Level-of-Service standards for drainage.

RESPONSE: The stormwater plan will use a combination of swales and stormwater ponds in order to preserve natural runoff conditions and rates. Where possible, LID elements will be included in the final plan. The drainage design will meet water quality and quantity standards for the St. Johns River Water Management District. The final drainage design and report will be submitted to the Town in conjunction with the final subdivision engineering plans.

28. Water Conservation and Irrigation: Montverde's Comprehensive Plan and subdivision standards require large developments to conserve potable water. For any subdivision over 25 lots, a non-potable water source for irrigation must be provided. Please confirm your plan for irrigation of lawns and common areas – e.g., utilizing reclaimed water from the on-site plant, a community irrigation well, or reuse of pond water – rather than using Town drinking water for irrigation. Additionally, all homes must be Florida Water StarSM certified per Town policy. Outline how the project will comply with Water Star standards (for efficient plumbing fixtures, irrigation systems, etc.). These measures are required to satisfy the Town's water conservation objectives.

RESPONSE: Acknowledged. Applicant will work with Town Staff to identify the appropriate water source for irrigation.

29. Open Space Allocation: The PUD master plan indicates approximately 28.4 acres of open space, which is about 42% of the site. This appears to exceed the Town's minimum 25% open space requirement (Comprehensive Plan Policy 1-1.1.2) Please provide a breakdown of

open space types (wetland conservation, upland green space, stormwater areas, recreation areas, etc.) and confirm the total % of upland open space. Ensure that the calculations exclude road rights-of-way and lots, and demonstrate at least 20% of the site is retained as common open space outside of wetlands (since wetland preservation alone may not count fully toward upland open space requirements). Any discrepancy (such as the plan listing a 15% requirement) must be corrected to meet the minimum standard.

RESPONSE: The Open Space tract and areas have been updated and clarified on the Table included with the PUD Master Plan. The Project will meet the requirements for 25% overall, and 20% not including wetland preservation areas.

30. Open Space Ownership & Maintenance: Describe how the substantial open spaces will be owned and managed. Consistent with Town requirements, all common open space should be platted as HOA tracts and protected via deed restrictions or conservation easements. Per the Neighborhood Standards Manual, for subdivisions of 20 or more units the HOA must have a mechanism to fund maintenance of conservation areas and common open space in perpetuity. Please confirm that a homeowners' association will be established and will be responsible for maintaining the parks, stormwater areas, wetlands/buffers, and the private roads and utilities. Outline any planned endowment, escrow or HOA dues structure that will ensure these shared amenities are maintained long-term.

RESPONSE: The Open Space will be owned and managed by the Bella Collina Property Owners Association ("POA"). The POA has more than adequate mechanisms and procedures for funding the maintenance of conservation areas and common open space. All above-referenced areas, as applicable will be maintained by the POA.

31. The requested variances from the Town of Montverde Neighborhood Standards and Guidelines Manual for New Subdivisions are not substantiated nor is it expressed how they will benefit the Town of Montverde. Instead it appears to replace the land development code authority of the Town with the authority of a subdivision architectural review board and property owner's association. The Town of Montverde Neighborhood Standards and Guidelines Manual for New Subdivisions are required to be met.

RESPONSE: The requested variances or waivers, justifications for same, and the additional performance standards which will accompany the requested variances are provided in line with Town Staff's direction, feedback and guidance. The requested waivers were requested following a thorough review of the Town of Montverde Neighborhood Standards and Guidelines Manual for New Subdivisions and work towards closely matching those standards

as much as reasonably possible given the unique circumstances of the Property. Outside of the limited and specifically described variances requested, all other performance criteria will meet or exceed the LDC regulations and the Town of Montverde Neighborhood Standards and Guidelines Manual for New Subdivisions.

32. Architectural Design Standards: The development must comply with the Town's adopted architectural standards for new homes. Please confirm your commitment to these standards and provide example renderings or elevations. In particular, each front street-facing façade must include at least 15% window area to avoid blank walls. The design should reflect Montverde's traditional character: acceptable exterior materials are predominantly fiber-cement siding (Hardie board), brick, stone, or other masonry, with stucco only if it fits an approved style. Decorative veneers (e.g. faux brick or stone panels) are prohibited. The Town will require design review of models for compliance. Please also note that per the guidelines, front entries should feature porches or overhangs for sun protection and visual interest, and the overall massing should incorporate offsets or recesses to avoid featureless walls.

RESPONSE: Architectural designs will comply with the Town's adopted architectural standards and guidelines manual. Elevations and specific building materials are provided in the POA documents.

33. Color Palette and Style: Montverde mandates historic or earth-tone color palettes for home exteriors. High-intensity or fluorescent paint colors, stark black/white extremes, or patterns without historic precedent are not allowed. The HOA/Developer will need to submit proposed exterior color schemes for Town approval. Please acknowledge this requirement and ensure the architectural guidelines for the subdivision will enforce the use of muted, traditional colors in keeping with the Town's aesthetic standards.

RESPONSE: Acknowledged. Architectural designs will comply with the Town's adopted architectural standards and guidelines manual.

34. Garage Orientation and Driveways: To prevent garage-dominated streetscapes, the Neighborhood Standards Manual places limits on front-loading garages. No more than 50% of the homes may have a front-facing garage door, and those that do must be designed with variations – for example, side-entry garages on some lots, and staggering of driveway placement so it's not repetitive adjacent to neighbors. Additionally, any front-facing garage on a corner or with side-oriented doors must include windows and trim on the street-facing side to add visual interest. Please explain how the subdivision will comply with these rules. Will narrower lots (50 feet or less) use alley access or rear garages as required on such lot widths? Provide a lot-by-lot garage plan or typical lot types to show the mix of garage orientations. Also note, each garage

must have at least a 27' x 29' interior to meet the Town's minimum size (ample room for two cars)mymontverde.com.

RESPONSE: *All residential dwellings shall include a garage adequate to park at least two (2) large sized automobiles. All garages shall be constructed of the same exterior materials and colors as the main structure. Garages shall not be used for any purposes which may prevent the daily use of the garage for the primary purpose of parking at least two (2) operating automobiles. On larger lots as defined by the Architectural Control Board (ACB) of the POA, garage doors facing the front street will be highly discouraged. Garage doors that face the street shall be of unique design finish and material as specifically submitted to and approved by the ACB. All garage doors must be decorative, including the use of glass inserts. Full glass garage doors are permitted with ACB approval. Any garage windows and garage walls visible from the street, public right of way, or adjoining property, shall have interior coverings that are consistent with the window coverings inside the house and plantings that are a minimum of 36" inches tall at maturity for screening from the view of the street and adjacent lots.*

35. Fencing and Walls: Any fences or walls in the development must adhere to Town standards. Chain-link, stockade-style privacy fences, barbed wire, chicken wire, and similar opaque or wire fences are prohibited. Acceptable styles include Montverde-style three-board fencing, picket fences, or ornamental wrought-iron types. If you plan to install a perimeter fence or entry gate feature, provide details on the design and materials for Town review. Front yard fences, if used, should not exceed 4 feet in height and are discouraged in favor of open frontages. All fence placements and heights will need to comply with LDC Article XI – please incorporate these restrictions into the project's architectural guidelines.

RESPONSE: *Guidelines for fencing and walls are provided in the POA documents attached for your review. The Project will comply with Article XI of the LDC and as mutually-agreed by Town Staff.*

36. Lighting and Signage: Although not detailed in your submittal, please be aware that all outdoor lighting (street lights, entrance lighting) and any subdivision signage must comply with Montverde's Land Development Code and the Neighborhood Standards Manual. Lighting should be dark-sky friendly and of a pedestrian scale, and any subdivision entry sign will require a permit and must meet size/height restrictions. We may issue separate comments on these at the construction plan stage, but early consideration is advised.

RESPONSE: *Acknowledged. A dark sky friendly lighting plan will be provided with the site plan submittal application.*

37. Solid Waste and Services: Finally, clarify how garbage collection will be handled since roads are private – will the Town’s waste hauler have access or will a private collection be arranged? Ensure there is adequate clearance and turning radius for service and emergency vehicles throughout the neighborhood (cul-de-sac design, etc.). This is to confirm practical infrastructure operation in compliance with Town specifications (fire code, waste service agreements, etc.). If any common dumpster or yard-waste area is planned (unlikely in a single-family subdivision), it would need to meet enclosure standards in the Code.

RESPONSE: Solid waste and recycling collection will be provided by Lake County. The Project will provide appropriate clearance and turning radius for service and emergency vehicles.

II. Reviewer: Anita Geraci-Carver, Town Attorney

1. Draft ordinance changing the FLU designation to Town of Montverde Single Family Low Density Residential of 9.47 acres was prepared and provided to the Town May 17, 2025 for review.

RESPONSE: Acknowledged. We would greatly appreciate a copy of the ordinance for our review at your convenience.

III. Regarding Rezoning Application Z25-000005 at Heatherwood Lane:

Reviewer: Anita Geraci-Carver, Town Attorney

1. Once the conceptual site plan is in final form I will draft a PUD ordinance for review and comment.

RESPONSE: Acknowledged.

IV. Regarding Small Scale Comprehensive Plan Application Z25-000004 and Rezoning Application Z25-000005 at Heatherwood Lane:

Reviewer: Brett Tobias, Engineer

1. The PUD plan and justification lists 114 units. The concurrency application lists 136 units.

RESPONSE: The concurrency application has been updated to 114 units and is attached for your review.

2. Traffic study not submitted.

RESPONSE: A Traffic Study is being submitted herewith.

3. Trees/landscaping are shown between the sidewalk and back of curb. Is the intent to plan these on top of proposed utilities? This will lead to potential issues with future operation of utilities. Would prefer a landscaping tract or easement behind the sidewalk.

RESPONSE: A revised typical section is provided with the PUD Plan. Utilities will not be in conflict with street trees.

4. Southeastern portion of site does not appear to be within town limits. Application appears to be for small scale comprehensive plan amendment and rezoning. Is annexation also a part of this application? Was an annexation application submitted?

RESPONSE: Yes, an annexation application was submitted and approved on April 2, 2025

5. The dimensions specified for on-street parking are not sufficient for that use. Florida Greenbook specifies 8-feet in width for local streets less than 35mph. It does allow for reduction to 7-feet in width for residential areas less than 25mph, however, that measurement is to face of curb, not back of curb. As shown, on-street parking width is only 5-feet.

RESPONSE: A revised typical section, consistent with the FDOT Green book requirements for travel lanes and on-street parking is included in the resubmittal of the PUD plan set.

6. PUD plan states that Wall heights shall be determined at final engineering. Recommend that applicant is familiar with Town Wall standard in case they want to request variances be a part of the PUD.

RESPONSE: An Additional waiver is being requested for retaining wall heights. The site is a unique hill side site, with an approximate elevation drop of 100 ft. from north to south with existing slopes of up to 10%. In order to create roads and lots on this hillside retaining walls will be required, with some walls being up to 20ft. in height. In some locations the elevation change will be accomplished by mechanically stabilized earth slopes in lieu of retaining walls. Engineering designs and plans will be provided with the final site construction plans.

7. Variance is requested for irrigation water to use potable water. If granted, irrigation mains should be required and then charged from the potable main so that the line can be transferred at such time that reclaimed water becomes available.

RESPONSE: Acknowledged.

8. Stormwater retention and the RIBs for the wastewater plan are shown occupying the same space. At final engineering, proper separation will be required to be shown.

RESPONSE: Acknowledged.

9. What is the intended phasing (if any) of the plan?

RESPONSE: The Project will be developed in one phase.

V. Regarding Annexation Application Z25-000001 at Heatherwood Lane:

10. From Section 2-51(1), the existing town limits should be referenced on an exhibit to determine if the parcel is contiguous to the town.

RESPONSE: Justification statement has been revised to illustrate contiguous limits to the Town of Montverde pursuant to LDC Section 2-51(1).

11. From Section 2-51(2), the future land use map of the comprehensive plan should be shown/referenced to determine if the parcel is within the town's planning area.

RESPONSE: Justification statement has been revised to illustrate that Subject property is located in Lake County's Wellness Way Area Plan and adjacent and abutting to the Magnolia Terrace subdivision in the Montverde R1L zoning district.

12. From Section 2-51(3), town staff should be consulted to determine service capabilities, permitted land uses and the role of the county and other cities. Have any such meetings taken place?

Response: Concurrency application has been submitted with SMALL SCALE COMPREHENSIVE PLAN AMENDMENT Z25-000004 and REZONING Z25-000005 applications. Applicant has met with Town Staff on numerous occasions to discuss.

13. From Section 2-51(4)(c), a survey including legal description should be provided.

RESPONSE: The Legal description and survey have been submitted under SMALL SCALE COMPREHENSIVE PLAN AMENDMENT Z25-000004 and Rezoning Z25-000005 applications.

14. The submitted application documents did not reference central water / central sewer / well / septic. How will services be provided. This is required from Section 2-51(4)(e).

RESPONSE: Justification statement has been revised to include a map with discussion of connecting to the existing water lines located on CR 455 and Ridgewood Avenue including a looped water line with interconnection to existing water mains on both Ridgewood Avenue and at the CR 445 / Morningstar Drive intersection. Wastewater will be provided through a central wastewater plan located onsite.

15. Section 2-51(4)(f) requires justification for the proposal in relation to the comprehensive plan.

RESPONSE: A justification statement has been provided

16. What will be the intended use of the property? Application states single family low density (R-1L). is the intent to subdivide the property?

RESPONSE: Intended use of the property is 114 single family detailed homes with dedicated open space and amenities as shown on the site plan.

VI. Regarding Small Scale Comprehensive Plan Application Z25-000004 at Heatherwood Lane:

Reviewer: Town Planner, Pending Completion of Rev

1. Sec. 10-9. - Review criteria. (1) The need and justification for the change; (2) The effect of the change, if any, on the particular property and on surrounding properties; (3) The amount of undeveloped land having the same classifications as that requested in the general area and throughout the town; (4) The relationship of the proposed amendment to the purposes of the town's comprehensive plan, with appropriate consideration as to whether the proposed change will further the purposes of this LDC and the plan; (5) The availability and provision of adequate services and facilities; (6) The impact on the natural

environment; and (7) other criteria as may be applicable.

2. (1) Satisfied; the applicant has provided the need and justification for the change. The applicant is seeking to unify the proposed annexation property (currently County RT) with the property already in Town of Montverde limits (R1L) to create a master-planned PUD.

RESPONSE: Acknowledged

3. (2) Satisfied; the Comp Plan Amendment will have a positive effect on the property as it will allow the property to be developed as a well thought out, master-planned, single-family residential community consisting of 114 homes with dedicated open space and amenities.

RESPONSE: Acknowledged

4. (3) Satisfied; the property proposed for the Amendment is compatible with the surrounding area. The proposed master-planned residential community is consistent with the adjacent residential land uses including Magnolia Terrace and Morningside Park Subdivisions. The Bella Collina community is south of the of the property and includes residential and commercial uses.

RESPONSE: Acknowledged

5. (4) Satisfied; the proposed Amendment is consistent with the town's comprehensive plan and will further the purposes of the plan and the LDC. An amendment to the LDC regarding annexation is required to be adopted prior to final approval of the comp plan amendment.

RESPONSE: Acknowledged

6. (5) Satisfied; the applicant has sufficiently addressed this requirement. Potable Water & FP Water: Once the annexation is approved, the entire property will be within town limits and in the service area of the Town. The property will access existing water lines located on CR 455 and on Ridgewood Ave. The project will include a looped water line with interconnection to existing water mains on both Ridgewood Ave and at the CR455/Morningstar Dr intersection. The property will receive wastewater service through a central wastewater plant located onsite. Roads & Drainage: The roadways and drainage system within the Subject Property will be owned and maintained by the Private Homeowners and Property Owners Association. Police & Emergency: The

subject property will be served by Lake County and/or the Town per existing areas of service and cooperative service agreements that may be required. Schools: Students will be eligible to enroll in LC Public Schools.

RESPONSE: Acknowledged

7. (6) Impact on natural environment: Please provide a statement about how the amendment will impact the natural environment.

RESPONSE: An updated justification statement is attached for your review regarding impact on the natural environment.

8. Open Space (Sheet 1 of 2): Please change the note regarding Minimum Required Common Open Space to 25% (instead of 15%) Section IV D (Town of Montverde Neighborhood Standards & Guidelines Manual for New Subdivisions revised March 2025 and approved by Town Council in May 2025 with Comp Plan Update). The proposed 41% meets and exceeds the open space requirement.

RESPONSE: The note on the PUD Plan has been changed to show that the minimum requirement is 25%.

9. Retaining Walls (Sheet 1 of 2): A waiver may be requested for any retaining walls over 6-feet and/or within 5-feet of property lines. Sec 4-52(e) and Sec 10-81. The final proposed height and location of retaining walls must be approved by Town Manager prior to construction.

RESPONSE: Yes, A Waiver is required. A justification statement was included in the response to a prior comment on this same item.

10. Sidewalks (Sheet 2 of 2 - Sec F6): A waiver has been requested for sidewalks less than 6-feet in width. The town places no conditions on this request as long as the sidewalks are a minimum width of 5-feet as specified.

RESPONSE: ACKNOWLEDGED.

11. Min Lot Size for Buildings (Sheet 2 of 2): Please change minimum lot size to 21,780 SF (instead of 9,800 SF) per Sec 10-51.

RESPONSE: Please see above comments, Applicant is clustering lots, to maximize open space while the overall gross density remains at 2DU/ acre.

12. Min Lot Width at Building Setback (Sheet 2 of 2): Please change to 100-feet (instead of 70-feet).

RESPONSE: Please see above comments, Applicant is clustering lots, to maximize open space. All performance criteria will be mutually agreed upon and specifically outlined in the PUD ordinance.

13. Min Street Frontage (Sheet 2 of 2): Please change to 60-feet (instead of 50-feet).

RESPONSE: Minimum Street frontage for pie shaped lots should remain 50 ft., allowing for a 70' lot dimension at the building setback.

14. Max Lot Coverage (Sheet 2 of 2): Please change to 50% (rather than 65%). This will be the same for the development as a whole as well as the individual lots.

RESPONSE: In order to achieve the intent of this comment, Applicant will provide max lot coverage at 65% and lower the overall site as a whole to 41%

15. Garages (Sheet 2 of 2 - Sec E3e): The town places one condition on this waiver request. Condition: The developer shall ensure a maximum of 25% lots with front loaded garages while encouraging the majority of the lots (especially larger lots) to have side-loaded garages.

RESPONSE: See Response to Comment #34 on pages 13 and 14.

16. Setbacks (Sheet 2 of 2): Please change to: 20' front, 7.5' sides, 20' rear. 35' setback on CR 455. 50' setback on wetland. Accessory structures and pool decks shall be allowed 7.5' from rear and side property lines.

RESPONSE: This change will be made on sheet 2.

17. A/C pads / Pool equipment (Sheet 2 of 2): May be within the rear or side yard setback, but shall not be located within any Drainage & Utility Easement.

RESPONSE: Acknowledged.

18. Pool/Deck/Screen Enclosure/ (Sheet 2 of 2): Please change both side and rear yard setbacks to 7.5'.

RESPONSE: This change will be made on sheet 2.

19. Landscaping & Irrigation: Please provide Landscaping & Irrigation Plans illustrating how the development will be in compliance with LDC Sec 4-178.

RESPONSE: We do not have landscape and irrigation plans to provide at this time as those items are not required at rezoning. However, the landscape and irrigation plans will be submitted with final engineering and will conform to the requirements of LDC Sec 4-178.

20. Housing Model & Style Variety (Sheet 2 of 2 - Sec IV(B): The town places two conditions on this waiver request. Condition 1: The developer shall create a tracking mechanism (such as a spreadsheet or map) which shows adherence to the agreed upon variety of models/styles in order to avoid monotony issues. This tracking mechanism must be communicated to and utilized by sales team members. Condition 2: In addition to meeting the requirement for front facades, where rear and side elevations face any public street, the same requirement specified herein shall be applicable.

RESPONSE: Acknowledged.

21. Architectural Standards (Sheet 2 of 2 - Sec E3a) - The town places one condition on this waiver request. Condition: Should any home have less than the required 24" eaves, then 18" eaves shall be permitted if they meet the HERS (Home Energy Rating System) calculation of 75 or below.

RESPONSE: Acknowledged.

22. Water Conservation (Sheet 2 of 2 - Sec f) - The town places one condition on this waiver request. Condition: Turf grass (sod) shall not exceed 55 percent of the total landscape coverage of any lot. The sod footprint can be reduced by creating mulched areas planted with Cordgrass (*Spartina bakeri*), a tall, massing grass that is drought tolerant.

RESPONSE: Acknowledged.

23. Property Owners Association (POA) Manual - The developer must provide a copy of the manual that will be distributed to property owners to ensure compliance with requirements and conditions set forth herein and in the final ordinance. The town may require additional language to be added to the manual if deemed necessary.

RESPONSE: POA manual is provided for Town review.

We appreciate your review of these responses. Please let us know if you have any questions or need additional information.

Very truly yours,



Logan J. Opsahl

LO/lak
Attachments



TRAFFIC STUDY

Dated July 2025

https://drive.google.com/file/d/1tE7dpC9HWW_zfGqIRKiu9d5HHmj4D9O/view?usp=sharing

New Traffic Study Requested



DATE: September 24, 2025

FROM: James Taylor, P.E.

SUBJECT: Montverde Estates/Bella Collina (Z25-000004 and Z25-000005)
Traffic Impact Study (Lake County comment response)

Kimley-Horn has received comments from the Town of Montverde (dated August 27, 2025) regarding the TIA (dated July 2025) provided for the proposed Montverde Estates development. In regard to these review comments, please see our responses below:

LAKE COUNTY TRAFFIC COMMENT: Lake County does not concur with the findings of the submitted traffic study, particularly the conclusion on page 23. The County requires both left and right turn lanes at the site access points on Ridgewood Avenue and CR 455. The traffic study references national highway standards, which do not align with Lake County's standards. These roads are not highways and function differently, requiring evaluation based on local criteria.

RESPONSE: Lake County's Transportation Planning, Design and Construction Standards appear to require consideration of turn lanes at driveways with 500 or more vehicle trips per day or 50 or more vehicle trips in any hour. Based on this understanding, the analysis provided in the Montverde Estates TIA dated July 2025 would indicate the following:

- **Ridgewood Avenue & Project Driveway Turn Lane Assessment**
 - Of 1,138 daily project trips, 37% or 421 daily trips, are anticipated to utilize this driveway. This quantity is less than 500 daily trip threshold for driveway turn lane consideration by the County.
 - Of 84 AM peak hour trips, 37% or 31 AM peak hour trips, are anticipated to utilize this driveway. This quantity is less than 50 hourly trip for driveway turn lane consideration by the County.
 - Of 112 PM peak hour trips, 37% or 41 PM peak hour trips, are anticipated to utilize this driveway. This quantity is less than 50 hourly trip for driveway turn lane consideration by the County.
 - In addition to the results of the TIA showing no need for turn lanes at the driveway [not for operational needs, no warrant for NCHRP cost-benefit guidance, low speed of the road (30 MPH posted), and low volumes anticipated at the driveway], the volumes indicated for consideration of turn lanes by the County are also not met.
- **CR 455 & Project Driveway Turn Lane Assessment**
 - Of 1,138 daily project trips, 63% or 717 daily trips, are anticipated to utilize this driveway. This quantity is more than 500 daily trip threshold for driveway turn lane consideration by the County.
 - Of 84 AM peak hour trips, 63% or 53 AM peak hour trips, are anticipated to utilize this driveway. This quantity is more than 50 hourly trip for driveway turn lane consideration by the County.
 - Of 112 PM peak hour trips, 63% or 71 PM peak hour trips, are anticipated to utilize

this driveway. This quantity is more than 50 hourly trip for driveway turn lane consideration by the County.

- o No project southbound right turns are anticipated at this driveway due to site access configuration and a very low quantity of trips anticipated north of Ridgewood Avenue. Therefore, a right turn lane is not recommended.
- o A northbound left turn lane can be provided by restriping existing pavement.

Based on this assessment, no turn lanes are recommended at the future intersection of Ridgewood Avenue & Project Driveway. Additionally, at the intersection of CR 455 & Project Driveway, a southbound right turn lane is not recommended. A northbound left turn meets the consideration threshold of Lake County's Transportation Planning, Design and Construction Standards, and can be provided by restriping existing pavement.

We believe this comment response adequately address Lake County's comments from the Montverde Estates review. If you have any questions or need additional information, please feel free to contact me at 407-409-7006 or by email at James.Taylor@kimley-horn.com.

Sincerely,



James Taylor, P.E.
Project Manager



ADVERTISING INFORMATION

V4 11/3/2025

ORDINANCE 2025-61

AN ORDINANCE OF THE TOWN COUNCIL OF THE TOWN OF MONTVERDE, FLORIDA, TO CHANGE THE ZONING FROM LAKE COUNTY PUD, AGRICULTURE AND LIGHT INDUSTRIAL AND TOWN OF MONTVERDE SINGLE FAMILY LOW DENSITY TO TOWN OF MONTVERDE SINGLE-FAMILY RESIDENTIAL PUD FOR THE HEREIN DESCRIBED PROPERTY OWNED BY DCS REAL ESTATE INVESTMENTS, LLC AND WILMINGTON DEVELOPMENT SERVICES INC.; THE REAL PROPERTY IS LOCATED SOUTH OF RIDGEWOOD AVENUE, WEST OF COUNTY ROAD 455 AND EAST OF BLACK STILL LAKE ROAD, MONTVERDE FLORIDA; APPROVING WAIVERS; DIRECTING THE TOWN MANAGER TO AMEND THE ZONING MAP AS HEREIN PROVIDED AFTER THE PASSAGE OF THIS ORDINANCE; APPROVING VARIANCES FROM TOWN CODE WITH CONDITIONS; PROVIDING FOR SEVERABILITY; REPEALING ALL ORDINANCES IN CONFLICT HERewith; PROVIDING FOR SCRIVENER'S ERRORS, AND PROVIDING FOR AN EFFECTIVE DATE.

WHEREAS, Jonathan P. Huels, Esq., as applicant on behalf of the owner, DCS Real Estate Investments, LLC., requested a rezoning from Lake County PUD, Agriculture and Light Industrial, and Town of Montverde Single-Family Low Density to Town of Montverde Single-Family Residential PUD; and

WHEREAS, the subject properties consist of 67.79+/- acres located, and is more particularly described in **Exhibit "A"** attached hereto; and

WHEREAS, the property has a future land use designation of Single-Family Low Density Residential as shown on the Town of Montverde Comprehensive Plan Future Land Use Map; and

WHEREAS, the proposed zoning is consistent with the future land use designation; and

WHEREAS, all property owners within 300 feet of the Property were provided written notice of requests for this PUD ordinance inclusive of waivers from the Town's Land Development Code; and

WHEREAS, the Town of Montverde Planning and Zoning Board held a public hearing on this ordinance and made a recommendation to the Town Council; and

WHEREAS, the Town has held such public hearing, and the records of the Town provide that the owners of the land affected have been notified as required by law; and

WHEREAS, this Ordinance has been advertised in a newspaper of general circulation in the town no less than 10 days prior to the public hearing.

NOW, THEREFORE, BE IT ORDAINED by the Town Council of the Town of Montverde, Florida, as follows:

V4 11/3/2025

Section 1: Zoning Classification.

That the Property shall be designated as Town of Montverde Single-Family Residential PUD in accordance with Land Development Code of the Town of Montverde, Florida, and this Ordinance.

See attached legal description attached hereto as **Exhibit A.** (the "Property").

The Property is more particularly depicted in **Exhibit B** attached hereto and incorporated herein.

Section 2: Terms.

The uses of the Property will be limited to those uses specified in this Ordinance and generally consistent with the Preliminary Development Plan attached as **Exhibit C.** To the extent there are conflicts between **Exhibit C** and this Ordinance, this Ordinance will take precedence.

A. Permitted Land Uses.

1. Residential –
 - a. Maximum of 114 single-family dwelling units having a minimum living area of 2,500 square feet exclusive of garages, and exterior covered or screened areas.
 - b. Maximum gross density: 1.68 DU/Acre
 - c. Maximum Impervious Area over entire PUD: 40%
2. Accessory uses directly associated with the single-family dwelling units may be approved by the town manager or designee.
3. Open Space – Minimum 10.17 acres (25%)
4. Any other use of the Property not specified within this PUD will require approval of an amendment to this Ordinance by the Town Council.

B. Lot Development Standards. Lot development shall be as follows:

	Lots 1 – 100	Lots 101-114
Minimum lot size for dwelling units	9,800 square feet	7,800 square feet
Minimum lot width at building setback	70 feet	60 feet
Minimum street frontage lot width (Lots on a corner)	50 feet	50 feet
Maximum lot coverage	65%	65%
Front yard minimum building setback	20 feet	20 feet
Adjacent to SR 455, minimum building setbacks	35 feet	35 feet
Side yard minimum building setback	7 ½ feet	7 ½ feet

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Side yard at corner minimum setback	17 ½ feet	17 ½ feet
Rear yard minimum setback*	20 feet	20 feet
Pool, screen enclosure and/or dwelling	7 ½ feet from any property line	7 ½ feet from any property line
Driveway**	3 feet from side yard property line	3 feet from side yard property line
Accessory Structures (Rear Yard Only)*	7 ½ feet from any property line	7 ½ feet from any property line
AC Pads/pool equipment***	7 ½ feet from any property line	7 ½ feet from any property line
Maximum building height	Two stories or 35 feet	Two stories or 35 feet
Parking, residential	Minimum of two off-street spaces, excluding garage	Minimum of two off-street spaces, excluding garage

***Waterfront and wetland lots.** 50' setback for waterfront and wetland lots. All development, including but not limited to fences, sheds, and accessory structures, excluding permitted docks shall adhere to a minimum setback of 50 feet from the delineation of the seasonal high-water elevation or jurisdictional wetland line (whichever line is higher). The seasonal high-water elevation and jurisdictional wetland line shall be established by a qualified professional using soil conditions and vegetative indicators. In ground concrete or fiber glass pools and associated pool decking are permitted within the 50-foot setback but must be at least 25-feet from the seasonal high-water elevation or wetland jurisdictional line (whichever line is higher). Sec. 10-90, Art. III, Ch. 10, LDC.

**** Driveway:** There shall be no development such as hardscape or gravel within this setback. Landscape and sod are the only permissible uses within 3-ft of each property line pursuant to Town code.

***** A/C pads/pool equipment:** May be located either at the rear of the house or within the side setback, excluding side corner setback. May be located within utility easements provided there are no Town underground utilities located within the easement.

Setback not specified: Any setback not specified must be in accordance with the Town of Montverde Land Development Code, as amended.

C. Environmental Requirements.

1. Prior to any development, a current environmental assessment must be submitted to identify impacts to wetlands, habitat, wildlife corridors, flora, and fauna. The environmental assessment must identify the location of nuisance and/or exotic plant species (According to UF-IFAS) and proposed methods to remove these plant species.
2. Development must adhere to all Comprehensive Plan requirements, and except as otherwise specified in this PUD, all Land Development Code regulations, as amended.
3. A 50-ft. buffer created between Tract "B" wetland and Tract "C" open space areas as depicted on Exhibit "C" must be provided. The final drainage plans and calculations must demonstrate the wetland will be protected from erosion and will meet all State water quality, quantity, and wetland protection criteria.

D. Stormwater Management. The stormwater management system shall be designed in accordance with all applicable Town of Montverde and St. Johns River Water Management District (SJRWMD) requirements; as amended. It is the responsibility of the Bella Collina Property Owners Association ("POA") to maintain all stormwater systems inclusive of drainage easements in perpetuity.

E. Utilities.

1. The provision of potable water must be permitted in accordance with Florida Department of Health, Florida Department of Environmental Protection, Town of Montverde Comprehensive Plan and Town of Montverde Code of Ordinance regulations. The developer must design, permit and construct at its expense connection to the Town of Montverde's potable water utility.
2. The provision of wastewater service must be permitted in accordance with Florida Department of Health, Florida Department of Environmental Protection, Town of Montverde Comprehensive Plan and Town of Montverde Code of Ordinance regulations. In lieu of constructing dry utility lines as required by Town code, the developer must design, permit and construct at its expense a Florida DEP approved central wastewater treatment plant that will be turned over to the Town of Montverde to own, operate and maintain.
3. The perimeter of the wastewater treatment plant must include a screen wall, landscape plantings and trees for visual screening.
4. The parties will enter into a utility agreement, if required by the Town, before or simultaneously with preliminary plat approval by Town Council.
5. Each lot must include utility easements in favor of the Town – 5-ft. side, 10-ft. front, and 10-ft. rear.

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6. A 10-ft. utility easement between Lots 24-25 for construction of the potable water line shall be provided in favor of the Town to allow the potable water utility to be looped and interconnected between CR 455 and Ridgewood Avenue.
7. Separate meters for irrigation and potable water are required.
8. All homes must be Water Star Certified.

F. Recreation areas.

1. Recreation areas must be allocated on the site in accordance with Policy 1-1.14.1 (C), Montverde Comprehensive Plan.

G. Open space/Impervious Surface Ratio.

1. Minimum open space standard is 25 percent in accordance with Policy 1-1.1.2, Montverde Comprehensive Plan.
2. Maximum area of each individual lot to be covered by impervious surface is strictly limited to 50 percent in accordance with the Town's Comprehensive Plan and LDC.

H. Parking.

1. Parking shall be accomplished in accordance with the Town of Montverde Neighborhood Standards and Guidelines Manual for New Subdivisions.

I. Transportation.

1. Transportation including roads, trails, sidewalks, and access shall be constructed in accordance with the Town of Montverde Neighborhood Standards and Guidelines Manual for New Subdivisions, the "Montverde Walks" Plan, and in coordination with Lake County Public Works and Trails, except as otherwise provided in this PUD.
2. All roads within the Property must be designed and constructed in accordance with City of Mount Dora standard providing 2-travel lanes, minimum 11 ft wide travel lanes of asphalt totaling no less than 22-ft with Miami Curb or other curbing approved by the Town's Engineer.
3. Access to and from Ridgewood Avenue is limited to residents only and emergency services via a transponder system, or similar technology.
4. Developer shall be responsible for preparing an updated traffic study at the time of submittal of the Phase I preliminary site plan for review and determination of any necessary improvements and dedication of right-of-way required by Lake County, and shall further be responsible for designing and constructing all transportation improvements based on such study and Lake County requirements, consistent with Florida law. The traffic study methodology must be approved by Lake County and the Town of Montverde. Developer shall be responsible for providing sufficient access for the provision of fire protection and

emergency services as required by the Florida Fire Prevention Code and the jurisdiction(s) having authority.

J. Phasing. The project will be developed in one phase.

K. Lighting.

1. Lighting shall be constructed in accordance with the Town of Montverde Neighborhood Standards and Guidelines Manual for New Subdivisions and must be consistent with "Dark Sky" criteria per the International Dark Sky Association (IDA) standards.
2. HOA is responsible for the costs of the lighting, electrical and maintenance.

L. Signage.

1. Signage shall be constructed in accordance with the Town of Montverde Neighborhood Standards and Guidelines Manual for New Subdivisions.

M. Sidewalks.

1. Developer must construct, at its expense, a continuous 6-ft. wide sidewalk along the south side of Ridgewood Avenue commencing at Lake Street and continuing to the existing sidewalk at Lakemont Avenue, and also along the west side of CR 455 from the existing sidewalk's termination at Alt. Key 1531713 and continuing to the intersection of CR 455 and Vetta Drive. Developer is not required to remove and replace existing sidewalks. All sidewalks outside of the development must adhere to the Montverde Neighborhood Design Standards & Guidelines.
2. Cross walks need to be constructed at Lake and Ridgewood, and from condos to entrance of new property.
3. Sidewalks must be constructed inside the development. Internal sidewalks must be no less than 5' in width and constructed of concrete pavers.

N. Driveways and Road Aprons.

Driveways and road aprons must be constructed in accordance with Section 4-84 of the Montverde Land Development Code.

O. Retaining Walls.

The site is a unique hill side site, with an approximate elevation drop of 100 ft. from north to south with existing slopes of up to 10%. In order to create roads and lots on this hillside retaining walls will be required, with some walls being up to 20ft. in height. In some locations the elevation change will be accomplished by mechanically stabilized earth slopes in lieu of retaining walls. Engineering designs and plans will be provided with the final site construction plans. Approval of the Town's engineer is required, and will not be unreasonably withheld.

Retaining walls must be located within maintenance easements with the POA responsible for maintenance and need not adhere to the minimum 5 ft. setback set forth by Code, provided approval is obtained from the town manager during construction plan review process.

Any walls which may or may not be required to accommodate a building permit on a specific lot that is not included in the development's infrastructure (construction) plans and approved as part thereof, must be designed and permitted by the individual lot builder, as applicable, and must conform to the required 5-ft. setback.

P. Landscaping.

1. Historic/Heritage trees on the Property must be preserved unless approved for removal by Town Council.
2. Where lots are adjacent to existing residential development, a minimum 10-ft. landscape buffer must be provided. All other landscape buffers must adhere to Exhibit "C".
3. Landscaping shall be accomplished in accordance with the Town of Montverde Neighborhood Standards and Guidelines Manual for New Subdivisions, and shall also include:
 - i. Within each residential lot, no more than 55 percent of the total landscape coverage is permitted to contain turfgrass.
 - ii. All landscape materials throughout the subdivision shall be Florida Friendly landscape materials.
 - iii. Landscape perimeter buffers and landscape in common areas must be comprised of 100 percent Florida native plants.
 - iv. In accordance with Town LDC, the minimum number of trees and shrubs on each lot shall be as follows except as provided below. (1) Florida native canopy tree in the front yard with 4" caliper minimum; (2) Florida native canopy trees in the rear yard 4" caliper minimum; and one more accent tree from the Florida Friendly TM list such as crepe myrtle 2" caliper. Shrubs must be 18" tall at the time of planting. The number of shrubs required in the front yard is based on 50% of the lot width (for example a 60-ft wide lot requires 30 shrubs, a 70-ft wide lot requires 35 shrubs planted in the front yard or within 15' of the front building line of the residence in the side yard. These are intended to be foundational shrubs. The Town Planner shall have flexibility in approving the location of trees and shrubs on a lot, using reasonable professional judgment, as long as each lot contains the required minimum number of trees and shrubs. The POA shall be responsible for ensuring the minimum number of trees required on each lot per the PUD is maintained.

- v. All trees installed for canopy coverage in areas including Right-of-Way, Open Space, and Common Areas must be comprised of 100% Florida native plants. This does not prevent the use of specimen fruit trees in appropriate areas. Trees that grow up to 30' should be planted at least 4' from any sidewalk. Canopy trees that are planted closer than 4' from a sidewalk shall require root barriers, as approved by the Town Planner. Any trees planted in addition to the minimum number of 100 percent Florida Native Florida trees must be classified as Florida Friendly per UF-IFAS.
- vi. Invasive Plant Species (as identified by the USDA Federal Noxious Weed List or UF-IFAS) are prohibited and must be removed from the entire Property prior to construction.
- vii. Irrigation *during first year of landscape plantings*. All landscaping must be irrigated during the first year of being planted to encourage healthy growth of the root system and establishment of the landscaping. The POA shall be responsible for keeping landscaping maintained in the Right-of-Way, Open Space and Common Areas.
- viii. Outreach Materials Landscaping - The developer/builder shall provide an educational brochure as part of the homeowners manual to each homeowner indicating to the homeowner acceptable landscape materials as defined by the Neighborhood Standards and Guidelines Manual for New Subdivisions. The brochure shall include information concerning the use of fertilizers pursuant to the Town's code and proper use recommendations from UF-IFAS.
- ix. Low Impact Development techniques will be used for swales and revegetation throughout the stormwater collection system. The revegetation will focus on establishing native habitats throughout the community.
- x. POA documents must include provisions for maintaining in perpetuity all common area features, stormwater system, and LID elements. The town must review and approve POA documents. Documents must provide a mechanism, such as mandatory reserve accounts to ensure financial sustainability for maintenance as required herein.

Q. Neighborhood Standards and Guidelines Manual for New Subdivisions.

- 1. The development must adhere to all other design criteria within the Neighborhood Standards and Guidelines Manual for New Subdivisions including, but not limited to:
 - i. Low Impact Development (LID) principles in accordance with the Neighborhood Standards and Guidelines Manual for New Subdivisions must be incorporated into the site plan and construction plans prior to the Town's Final Plat approval.

- ii. Fences. Acceptable fencing includes wrought iron or aluminum, picket fences (wood or vinyl), and "Montverde Style" fence. Prohibited fence styles include chain link, wire mesh, wood or vinyl stockade style fences of any size, barbed wire, chicken wire (or similar), field fences, and wire fences of any type or construction with opaque fabric. Fences of any type are discouraged in front yards but permitted so long as they are 4 ft in height or less. Privacy fences are permitted around pools and spas but not on property boundaries.
- iii. Outreach Materials LID – In order for a development to successfully sustain LID and Landscaping techniques planned for installation, it is important for all stakeholders in a project to understand the LID measures and use of native landscapes and each individual's role to protect the water and landscape environment. Contractors should understand the proper installation methods; builders should understand the value of proper installation and maintenance of the LID measures; and future/ potential property purchasers and owners should be made aware of the value that inclusion of LID in the site design has for the owner, as well as understand the importance of, and ensuring that future maintenance and operation occur.

P. POA Responsibilities for a Conservation Oriented Neighborhood.

1. A printed, bounded, color manual shall be given to each homeowner. The manual shall describe the natural resources within and adjacent to the residential subdivision. At a minimum, but not limited to, the manual shall provide the following. This information must be included in the final plat provided then included in POA documents as an exhibit to the recorded declarations.
 - i. The manual shall inform the homeowners regarding the ecological and hydrologic importance of the buffer areas and easements and the requirement for these areas to remain passive, free from structures and vehicles, and non-native plants. The subdivision's LID design and intent shall be discussed in this manual.
 - ii. The manual shall provide a list of preferred and prohibited plant and tree species and graphically depict the limits of sod use to a maximum of 55 percent coverage.
 - iii. The manual shall graphically (in color) depict permitted fence types.
 - iv. The manual shall provide information on fertilizer restrictions.
2. Signs shall be installed noting the limits and restrictions of the easements. The signs shall be visible to each lot and shall contain language noting the area as a conservation easement and that no structures or landscaping shall be installed beyond the point of the sign. The signs shall also note that the area is to be maintained by the POA and not the homeowner.

3. A management plan for the open space, shoreline areas and conservation easements must be provided to the Town prior to construction activities. The management plan must be prepared by a qualified conservation biologist who is experienced in managing conservation easements. The plan must provide assurances that perpetual management activities include the on-going removal of any nuisance/exotic vegetative species that may occur.

Section 3: Waivers approved with conditions.

1. Waiver from: Section V.B. Housing Model/Style Variety.

Each development of 50 or more homes shall have at least seven (7) models with at least three (3) variations and material treatments of each model.

No street block should have more than two consecutive single-family homes with the same house model.

Granted with the following conditions:

- a) Each development of 50 or more homes shall have at least four (4) models with three (3) variations and material treatments for each model which will be individually approved by the Bella Collina Architectural Control Board (the "ACB").
 - b) Home elevations, roof style & color and main house body color schemes shall not be duplicated within four (4) homes of each other, both on the same side of the street and across the street.
 - c) The developer shall create a tracking mechanism (such as a spreadsheet or map) which shows compliance. This tracking mechanism must be communicated to and utilized by sales team members.
 - d) Where rear and side elevations face any public street, the same requirements applicable to front facades shall be applied.
- 2. Waiver from: Section V.E. Architectural Standards. General Architectural Standards for all Homes. a. Overhangs and awnings shall be no less than two (2) feet deep to function as an energy conservation measure and to protect people and the house from bright sunlight..**

Granted with the following conditions:

- a) Overhangs and awnings shall be no less than eighteen (18) inches in addition to all homes meeting the 2023 Florida Energy Efficiency Code for Buildings and the HERS (Home Energy Rating System) calculation of 75 or below.
- 3. Waiver from: Section V.E. Architectural Standards. General Architectural Standards for all Homes. e. Garages. i) Where lots are 50 ft. or less in width, garages must be alley-loaded; ii)**

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A front-loaded lot with side-facing door(s) must incorporate windows and trim on the wall facing the front street; iii) Front-loaded garage lots must randomly alternate the location of driveways in relation to front façade, to avoid repetition; iv) No more than 50 percent of the lots in proposed subdivision (all phases) are permitted to contain front loaded garages; v) Garages must be at a minimum 27 ft x 29 ft interior size.

Granted with the following conditions:

- a) All residential dwellings shall include a garage adequate to park at least two (2) large-sized automobiles. All garages shall be constructed of the same exterior materials and colors as the main structure. The declarations of covenants, conditions and restrictions for the community must include the following language and also provide that it cannot be changed without the Town's written consent: *Garages shall not be used for any purposes which may prevent the daily use of the garage for the primary purpose of parking at least two (2) operating automobiles.* On larger lots as defined by the ACB, garage doors facing the front street will be highly discouraged. Garage doors that face the street shall be of unique design, finish, and material, as specifically submitted to and approved by the ACB. All garage doors must be decorative including the use of glass inserts. Full glass garage doors are permitted with ACB approval. Any garage windows in garage walls visible from the street, public right-of-way or adjoining property shall have interior coverings that are consistent with the window coverings inside the house and plantings that are a minimum of 36" tall at maturity for screening from the view of the street and adjacent lots.

- 6. **Waiver from:** Section V.F. Staying Connected – Walkable Neighborhoods. Internal Sidewalks A minimum of six (6) foot wide concrete sidewalks shall be constructed along each side of all streets. Each sidewalk shall be located within and in parallel alignment with the street right-of-way. The back of the sidewalk shall be found contiguous with the right-of-way and property line boundary. Standard right-of-way grade shall provide a maximum elevation of three quarters inch rise per one foot run; beginning from the back of the curb to the intersection point at the front of the sidewalk. All sidewalks shall have handicapped access at all intersections and be ADA compliant.

Granted with the following condition:

- a) A minimum five (5) foot-wide sidewalk shall be constructed in Old Castle Appian Napoli concrete pavers along each side of all streets within the gated section of the development. All sidewalks outside of the gated section of the development will require a minimum six (6) foot-wide concrete sidewalk and in adhering to the Montverde Neighborhood Design Standards & Guidelines. All sidewalks, including those internal to the project and constructed of pavers, must comply with ADA requirements.

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9. **Waiver from:** Water Conservation. Consistent with the Town's Comprehensive Plan, for any proposed subdivision having the more than 25 lots; non-potable sources for landscape irrigation must be provided.

Granted with the following conditions:

- a) All Owners, Builders and subcontractors are required to abide by the water restrictions when planning, planting and modifying landscaping or irrigation systems. The total area of irrigation may not exceed the allowable area per the consumptive use permit issued to the Town by St. Johns River Water Management District ("SJRWMD"). All plans and specifications submitted for final approval whether new construction or modification shall include evidence of compliance with the provision. Low volume toilets and showerheads must be incorporated into all residential plumbing systems. In the event that SJRWMD declares a water shortage, all Owners must adhere to the water shortage restrictions issued by SJRWMD. The soil amendments such as Profile and Command soil, or equivalent, shall be incorporated into the cleared portion (plantings and sod) of all residential lots. The application of soil amendments shall conform to the manufacturer's recommendation. St. Augustine grass shall not be planted. Owners shall use drought tolerant Zoysia or Bahia grass. Micro-irrigation techniques shall be tried in locations where they can be used efficiently, such as in planting bed areas. Irrigation systems shall be zoned according to plant water requirements. Irrigation systems shall be designed to prevent over-spraying onto impervious surfaces (such as driveways and sidewalks). Irrigation systems shall incorporate an automatic shut-off rain sensor. All residential landscape plans must be certified upon delivery by a Florida registered landscape architect and must be submitted to the ACB for review. All residential landscape plans must be approved by the ACB before commencement of work. All residential landscaping shall comply with the Landscape Materials List and Guidelines and Lot Landscape Specifications set forth in the ACB Guidelines, Rules, and Regulations.
- b) Turf grass (sod) shall not exceed 55 percent of the total landscape coverage of any lot. The sod footprint can be reduced by creating mulched areas planted with Cordgrass (*Spartina bakeri*), a tall, massing grass that is drought tolerant.

Section 5: General Conditions.

- a) No person, firm, or corporation may erect, construct, enlarge, alter, repair, remove, improve, move, convert, or demolish any building structure, add other uses, or alter the land in any manner within the boundaries of the above described land without first obtaining the necessary approvals in accordance with the Town of Montverde Code, as amended, and obtaining the permits required from the other appropriate governmental agencies.
- b) This Ordinance will ensure to the benefit of, and will constitute a covenant running with the land and the terms, conditions, and provisions of this Ordinance, and will be binding upon the present Owner and any successor, and will be subject to each and every condition in this Ordinance.
- c) The transfer of ownership or lease of any or all of the property described in this Ordinance must include in the transfer or lease agreement, a provision that the purchaser or lessee is

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made good and aware of the conditions established by this Ordinance and agrees to be bound by these conditions. The purchaser or lessee may request a change from the existing plans and conditions by following procedures contained in the Land Development Code, as amended.

- d) Action by the Town Code Enforcement Special Master. The Town Code Enforcement Special Master will have authority to enforce the terms and conditions set forth in this ordinance and to recommend that the ordinance be revoked.

Section 6: Consistent with Comprehensive Plan.

That the zoning classification is consistent with the Comprehensive Plan of the Town of Montverde, Florida.

Section 7 Official Zoning Map.

That the Town Manager, or designee, is hereby directed to amend, alter, and implement the official zoning maps of the Town of Montverde, Florida, to include said designation consistent with this Ordinance.

Section 8: Severability.

That if any provision or portion of this Ordinance is declared by any court of competent jurisdiction to be void, unconstitutional, or unenforceable, then all remaining provisions and portions of this Ordinance shall remain in full force and effect.

Section 9: Scrivener's Errors. Scrivener's errors in the legal description may be corrected without a public hearing or at a public meeting, by re-recording the original ordinance or a certified copy of the ordinance and attaching the correct legal description.

Section 10: Conflict.

That all ordinances or parts of ordinances in conflict herewith are hereby repealed.

Section 11: Effective Date.

This Ordinance shall become effective immediately upon its approval and adoption by the Town Council of the Town of Montverde.

ADOPTED AND APPROVED by the Town Council of the Town of Montverde, Lake County, Florida this ____ day of _____, 2025.

Joe Wynkoop, Mayor

Attest:

Caroline Trepanier, Town Clerk

Approved as to form and legality:

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Anita Geraci-Carver, Town Attorney

First Reading _____
Second Reading _____

Council Member _____ moved the passage and adoption of the above and foregoing Ordinance. Motion was seconded by Council Member _____ and upon roll call on the motion the vote was as follows:

	YEA	NAY
Councilmember Bryan Rubio		
Councilmember Grant Roberts		
Councilmember Joe Morganelli		
Vice Mayor Carol Womack		
Mayor Joe Wynkoop		

Exhibits:

Exhibit A – Legal Description
Exhibit B – Map Depicting Property
Exhibit C - Preliminary Development Plan

Exhibit A – Legal Description

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Exhibit B – Map Depicting Property

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Exhibit C - Preliminary Development Plan



NOTICE OF PUBLIC HEARINGS

You are receiving this notice because you own property within 300-feet of a property requesting a change in zoning to Single Family Residential PUD (see below). The Town of Montverde is required by law to notify you of the upcoming public meetings. If you have no questions, or do not wish to attend these meetings, you may disregard this notice. No action is required of you.

The Town of Montverde Planning and Zoning Board will hold a public hearing on **Wednesday, November 12, 2025, at 6:30 p.m.**, and the Town Council will hold public hearings on **Tuesday, December 9, 2025, at 7:00 p.m.**, and **Tuesday, December 16, 2025 at 6:30 p.m.**, at the Town Hall Auditorium located at 17404 Sixth Street, Montverde, Florida to deliberate on the following:

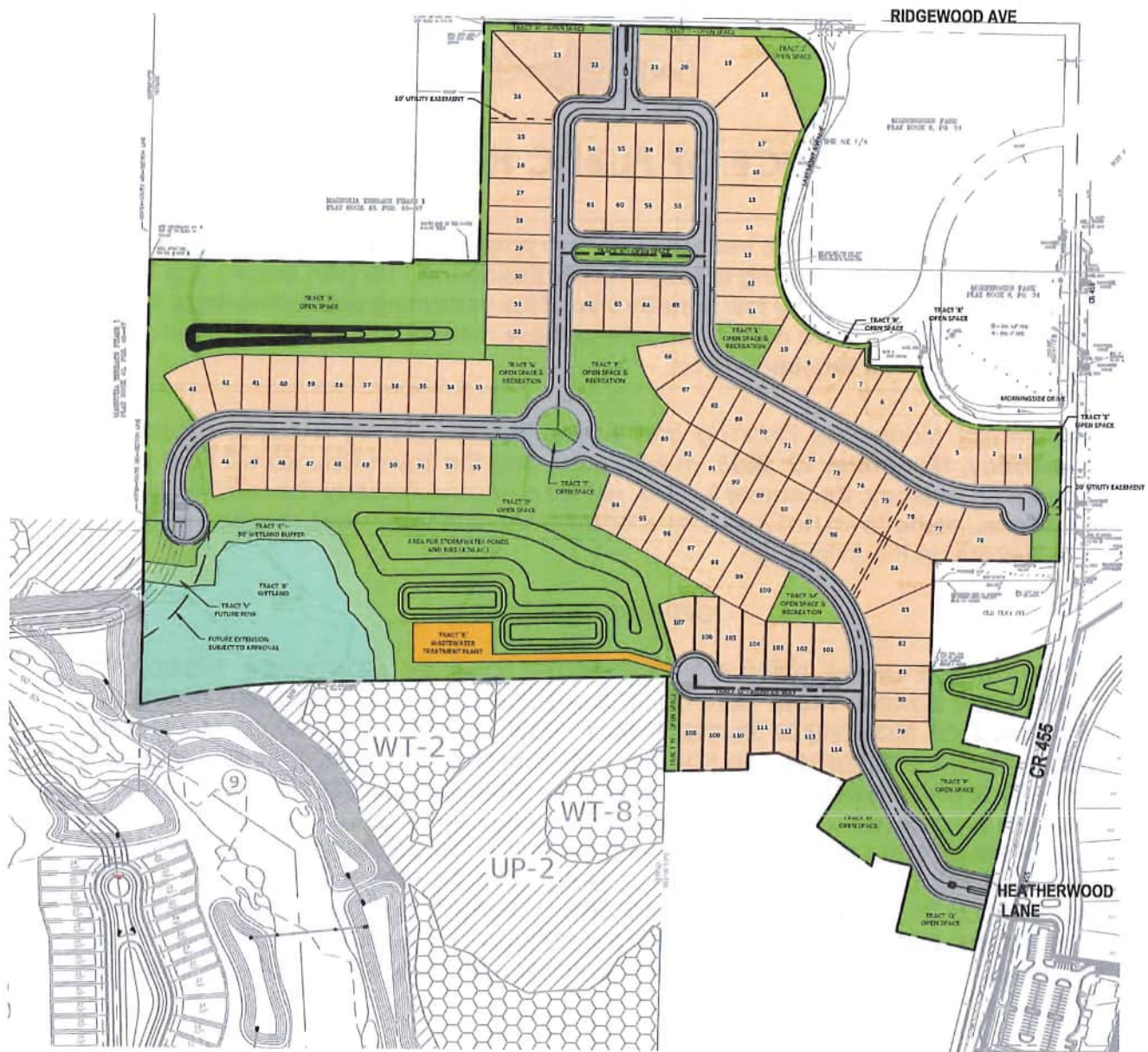
ORDINANCE 2025-61

AN ORDINANCE OF THE TOWN COUNCIL OF THE TOWN OF MONTVERDE, FLORIDA, TO CHANGE THE ZONING FROM LAKE COUNTY AGRICULTURE, PUD, AND LIGHT INDUSTRIAL AND TOWN OF MONTVERDE SINGLE FAMILY LOW DENSITY TO TOWN OF MONTVERDE SINGLE-FAMILY RESIDENTIAL PUD FOR THE HEREIN DESCRIBED PROPERTY OWNED BY DCS REAL ESTATE INVESTMENTS, LLC AND WILMINGTON DEVELOPMENT SERVICES INC.; THE REAL PROPERTY IS LOCATED SOUTH OF RIDGEWOOD AVENUE, WEST OF COUNTY ROAD 455 AND EAST OF BLACK STILL LAKE ROAD, MONTVERDE FLORIDA; APPROVING WAIVERS; DIRECTING THE TOWN MANAGER TO AMEND THE ZONING MAP AS HEREIN PROVIDED AFTER THE PASSAGE OF THIS ORDINANCE; APPROVING VARIANCES FROM TOWN CODE WITH CONDITIONS; PROVIDING FOR SEVERABILITY; REPEALING ALL ORDINANCES IN CONFLICT HERewith; PROVIDING FOR SCRIVENER'S ERRORS, AND PROVIDING FOR AN EFFECTIVE DATE.

Interested parties may appear at the public hearings and be heard with respect to the proposed ordinance. Persons with disabilities needing assistance to participate in this proceeding should contact the Town Clerk at least 48 hours before the meetings at 407-469-2681.

This ordinance is available at the Town Clerk's Office, at Town Hall located at 17404 Sixth Street, Montverde, Florida, for inspection on Monday through Thursday, from 8:00 a.m. to 5:00 p.m.

Persons are advised that if they decide to appeal any decision made at this meeting, they will need a record of the proceeding, and for such purposes, they may need to ensure that a verbatim record of the proceeding is made which includes the testimony and evidence upon which the appeal is based, per Section 286.0105, Florida Statutes.



MONTVERDE ESTATES – PUD CONCEPT PLAN

Alt Keys: 1037247, 3809249, 1592020, 1592038, 1592054,
1592071, 1592089, 1592101, 1814120, 1066557, 1066263, 1037212, 2615346

The applicant is proposing a new 67.57-acre residential neighborhood near Heatherwood Lane that would include 114 single-family homes within a gated community. The project combines several parcels currently in Lake County with nearby properties already in Montverde, creating a unified development under the Town's Single Family Residential Planned Unit Development (PUD) zoning. The plan includes 40% open space where 25% is required.

Paul Larino, Town Manager
Town of Montverde

ADAMS MICHAEL J & SHELLEY R
16735 RIDGEWOOD AVE
MONTVERDE, FL 34756

ALLAN M DE LA CONCHA INTER
VIVOS REVOCABLE TRUST
16615 SEVENTH ST
MONTVERDE, FL 34756

ALTMAN DAVID W & SHERRY W
16406 MAGNOLIA BLUFF DR
MONTVERDE, FL 34756

ANGELA M HAMILTON REVOC TRUST
16430 MAGNOLIA BLUFF DR
MONTVERDE, FL 34756

BAKER KEVIN J & CHERYL D
16716 MAGNOLIA TERRACE BLVD
MONTVERDE, FL 34756

BARISANO JONATHAN & JESSICA
16550 MORNINGSIDE DR
MONTVERDE, FL 34756

BELLA COLLINA PROPERTY OWNERS
ASSN INC
1631 E VINE ST STE 300
KISSIMMEE, FL 34744

BLOSSOMS INVESTMENT
PROPERTIES LLC
PO BOX 560619
MONTVERDE, FL 34756-0619

BLUE WATER MINING LLC
7410 30TH CT
VERO BEACH, FL 32967

BOSWORTH BRUCE A & JO ANN
LIFE ESTATE
16625 MORNINGSIDE DR
MONTVERDE, FL 34756

BOYD RICHARD L & CHERYL L
16830 RIDGEWOOD AVE
MONTVERDE, FL 34756

BURDEN ALLEN M & MELODY P
PO BOX 560163
MONTVERDE, FL 34756-0163

BURDEN TERRY A ET AL
PO BOX 560163
MONTVERDE, FL 34756-0163

BWJ LLC
11030 ULLSWATER LN
WINDERMERE, FL 34786

CARROLL JOHN B
17638 GLADYS ST
MONTVERDE, FL 34756

CHABERT BARRETO ASTRID M &
ENRIQUE A SANTIAGO
16424 MAGNOLIA BLUFF DR
MONTVERDE, FL 34756

COLEMAN ANDREA
16546 SEVENTH ST
MONTVERDE, FL 34756

CORREY TIM & REGINA L MAZAK
16751 RIDGEWOOD AVE
MONTVERDE, FL 34756-3429

DAVID L BOSTWICK & SUAN D
THOMPSON JOINT REVOC TRUST
16816 LAKEMONT AVE
MONTVERDE, FL 34756

DCS CAPITAL INVESTMENTS LLC
505 S FLAGLER DR STE 900
WEST PALM BEACH, FL 33401

DCS REAL ESTATE INVESTMENTS LLC
217 PERUVIAN AVE STE 2
PALM BEACH, FL 33480-4688

DCS REAL ESTATE INVESTMENTS LLC
505 S FLAGLER DR STE 900
WEST PALM BEACH, FL 33401-5948

DCS REAL ESTATE INVESTMENTS LLC
505 S FLAGLER DR STE 900
WEST PALM BEACH, FL 33401-5948

DE CLERCQ ANDREW & TINA
16540 MORNINGSIDE DR
MONTVERDE, FL 34756

DEBORAH J PERLET REVOCABLE
LIVING TRUST
16412 MAGNOLIA BLUFF DR
MONTVERDE, FL 34756

DELANEY DEBRA C TRUSTEE
16724 MAGNOLIA TER
MONTVERDE, FL 34756-3512

DELISLE ERIC B
16829 RIDGEWOOD AVE
MONTVERDE, FL 34756

ELDRIDGE JOHN & KERRY
16436 MAGNOLIA BLUFF DR
MONTVERDE, FL 34756-3507

FAITHS PROMISE LLC
203 MOHAWK RD
CLERMONT, FL 34715

GANT EBONI & DEVIN D
16528 BOLSENA DR
MONTVERDE, FL 34756

GONZALEZ HUGO & ANA MARIA
700 GRISHAM ST
WINTER GARDEN, FL 34787

GUSTINO JAMES A & WENDY L
16632 MORNINGSDR
MONTVERDE, FL 34756

HEATHMAN DALE J & DEBRA A
PO BOX 560186
MONTVERDE, FL 34756-0186

HERON BARRY & LOUISE
16356 MAGNOLIA BLUFF DR
MONTVERDE, FL 34756-3510

HILL JAMES M
16824 RIDGEWOOD AVE
MONTVERDE, FL 34756

HORST JEFFREY LIFE ESTATE
16748 MAGNOLIA TERRACE BLVD
MONTVERDE, FL 34756

HUDDERS EUGENE S
16721 MAGNOLIA TERRACE BLVD
MONTVERDE, FL 34756

HUNT FREDDIE W & JANIE W
1630 PINE RIDGE DAIRY RD
FRUITLAND PARK, FL 34731

IRIZARRY ANGEL A & SANDRA
451 FREEMAN ST
LONGWOOD, FL 32750

JOHNSON JEFFREY Z JR & MELISSA C
16455 MAGNOLIA BLUFF DR
MONTVERDE, FL 34756

JOHNSON MATTHEW &
16401 COUNTY ROAD 455
MONTVERDE, FL 34756

KENNEDY THOMAS G LIFE ESTATE
PO BOX 560256
MONTVERDE, FL 34756-0256

LAKE APOPKA NAT GAS DISTRICT
PO BOX 771275
WINTER GARDEN, FL 34777-1275

LEONARD ANTHONY L & GRETCHEN
16442 MAGNOLIA BLUFF DR
MONTVERDE, FL 34756

LOPEZ-RAMIREZ CARMEN L
1535 HAWKESBURY CT
WINTER GARDEN, FL 34787

LORI S BRUCKHEIM REVOC TRUST
16629 MORNINGSDR
MONTVERDE, FL 34756

MAGNOLIA TERRACE HOA INC
PO BOX 560252
MONTVERDE, FL 34756-0252

MATHUR ADESH & RUCHIKA
16524 BOLSENA DR
MONTVERDE, FL 34756

MC CORMACK SHANE A &
ALEXANDRA M BARKER
16449 MAGNOLIA BLUFF DR
MONTVERDE, FL 34756

MC NEES SCOTT & MARY
16732 MAGNOLIA TERRACE BLVD
MONTVERDE, FL 34756

MORNINGSDR PARK PROPERTY
OWNERS
UNKNOWN
UNKNOWN, UU 99999

MORTON SHANNON M
16836 RIDGEWOOD AVE
MONTVERDE, FL 34756

OYOLA JUANA
16546 MORNINGSDR
MONTVERDE, FL 34756

PERDUE JERRY & LIZZA
16800 LAKEMONT AVE
MONTVERDE, FL 34756

PERGRAM KIERA A & MICAH J
16443 MAGNOLIA BLUFF DR
MONTVERDE, FL 34756

PHIRI GERALD & KHRISTAL L
16820 LAKEMONT AVE
MONTVERDE, FL 34756

POMPEO JOHN D & TISHA
CHRISTOPHER
16400 MAGNOLIA BLUFF DR
MONTVERDE, FL 34756-3507

PRICE JOHN S & NANCY J
16796 LAKEMONT AVE
MONTVERDE, FL 34756

PRICE MARGARET A & ELVIS
16808 LAKEMONT AVE
MONTVERDE, FL 34756

RITTENBERG JONATHAN S & MARIA J
16448 MAGNOLIA BLUFF DR
MONTVERDE, FL 34756

ROBERT T J BOND REVOC TRUST
16418 MAGNOLIA BLUFF DR
MONTVERDE, FL 34756

RODRIGUEZ COLLADO JONATHAN &
SHARON MIRANDA
16817 RIDGEWOOD AVE
MONTVERDE, FL 34756

ROOT SAMUEL ET AL
16649 MORNINGSIDE DR
MONTVERDE, FL 34756

ROSS KATHLEEN A & CHARLES F
16812 LAKEMONT AVE
MONTVERDE, FL 34756

SALBER ZANE M & KAEA Y
16450 COUNTY ROAD 455
MONTVERDE, FL 34756

SIENA AT BELLA COLLINA
CONDOMINIUM ASSN INC
505 S FLAGLER DR STE 900
WEST PALM BEACH, FL 33401

STECKELBERG WILLIAM
16619 7TH ST
MONTVERDE, FL 34756

TARVER ANDREW A & PAMELA D H
16454 MAGNOLIA BLUFF DR
MONTVERDE, FL 34756

TORRES JUAN J & GRICELDA
499 PICWOOD CT
OCOE, FL 34761

TOWN OF MONTVERDE
PO BOX 560008
MONTVERDE, FL 34756-0008

TUCKER LUCAS M & KACI E
16804 LAKEMONT AVE
MONTVERDE, FL 34756

VANDERWILL WILLIAM C LIFE ESTATE
PO BOX 560032
MONTVERDE, FL 34756-0032

WESTLUND JEREMY J & KIMBERLY D
16611 SEVENTH ST
MONTVERDE, FL 34756

WILMINGTON DEVELOPMENT
SERVICES INC
505 S FLAGLER DR STE 900
WEST PALM BEACH, FL 33401-5948

WLADYCZKA JAROSLAW S & MARTA
16632A MORNINGSIDE DR
MONTVERDE, FL 34756



PUBLIC COMMENTS

October 15, 2025

Town of Montverde
17404 Sixth Street
Montverde FL 34756

Attn: Joe Wynkoop, Mayor
Copy: Paul Larino, Town Manager
Planning & Zoning Board

Dear Mr. Wynkoop,

We would like to address the development of Plat 4 which is located directly behind our property at 16418 Magnolia Bluff Drive, per the notification received in mid-September.

My husband and I had been looking for the 'just right' location and home for several months during 2024 and even prior to that, all during increasing prices and people buying homes as quickly as they came onto the market. When this property became available we immediately went to view it, absolutely fell in love with the Montverde area, and with the stunning view from our back yard. This view was the deciding factor to purchase immediately. We bought it with the surety that it would be our 'final/last' home since we are both in our 80's. We weren't concerned about any changes in our probable lifetime.

It is difficult to oppose development and certainly the Town of Montverde is anxious to add tax-paying properties as well. That is progress.

As you can understand, we and other neighbors are deeply concerned about losing our beautiful view. We are asking that our Mayor and the Town Council, as well as the Planning and Zoning Board, consider our request as follows.

"We are desperately pleading that a 20-25 foot border of the current trees and undergrowth be left as is. This would provide a barrier between our homes and the Plat 4 development."

I, and others, did attempt to attend the first scheduled Planning and Zoning meeting on September 23, 2025 at 6:30pm. Upon arrival we found a sign on the door stating that the meeting had been cancelled. I've been following the Town online postings and have not seen notice of another such meeting. Someone I spoke with did say that the Planning and Zoning Board would need to be first in line to discuss a re-zoning so I'll keep watching for their meeting.

Is there anything else that any of us could be doing to make ourselves heard on this subject? We can be reached at 352-552-1933 (call or text), as well as email: glhg39@yahoo.com

Thanks so much,

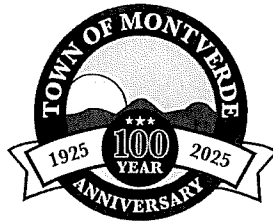


Gayle Bond and Robert Bond

Enclosure: picture of view



Save Our Trees



STAFF REPORT

To: Honorable Mayor and Council Members

From: Paul Larino, Town Manager
Iman Rashid, Administrative Assistant

Date: December 4th, 2025

Subject: Golf Cart Ordinance 2025-62

Background

At the October 14th, 2025, Council meeting, Council directed staff to request input from Lake County regarding the possible authorization of golf carts on designated segments of Fosgate Road and Blackstill Lake Road. Since then, Lake County has not yet issued a final determination. Decisions have been delayed due to various scheduling and disaster recovery efforts related to the weather.

As part of this initiative, the Town is evaluating proposed amendments to Chapter 24 of the Montverde Code of Ordinances. These amendments aim to align the existing ordinance with updated state statutes and to allow operations on 455 and Ridgewood, contingent upon Lake County's approval. Staff are currently awaiting confirmation from Lake County on whether golf carts may be permitted on Fosgate Road and Blackstill Lake Road.

Recommendation

This report is submitted to assist the Council in its upcoming consideration of the proposed ordinance. Staff respectfully recommend that Council proceed with the first reading of the previously viewed Ordinance. If Lake County indicates support for allowing golf carts on Fosgate and Blackstill, necessary modifications can be incorporated at the second hearing. A response from Lake County is requested before the second hearing to ensure the Council can take appropriate and informed action.

Attachments

- Ordinance 2025-62

ORDINANCE 2025-62

AN ORDINANCE OF THE TOWN OF MONTVERDE, LAKE COUNTY, FLORIDA, RELATING TO THE REGULATION OF THE OPERATION OF GOLF CARTS ON PUBLIC STREETS WITHIN THE TOWN OF MONTVERDE; AMENDING CHAPTER 24 OF THE MONTVERDE CODE OF ORDINANCES; PROVIDING FOR REPEAL OF ALL CONFLICTING ORDINANCES; PROVIDING FOR SEVERABILITY AND PROVIDING FOR AN EFFECTIVE DATE.

WHEREAS, the Town of Montverde has certain responsibilities for the public health, safety and welfare within the Town limits; and

WHEREAS, Chapter 166, Florida Statutes, authorizes towns and municipalities to adopt ordinances to protect the citizen's health, safety and welfare, in exercise of the Town's police power; and

WHEREAS, in Ordinance 2017-18 the Town Council authorized the operation of golf carts within the Town; and

WHEREAS, the Town Council has considered the speed, volume, and character of motor vehicle traffic using the roads and streets named herein and finds that golf carts may safely travel on or cross the public roads or streets listed in this ordinance;

WHEREAS, the Town Council has determined that it is in the best interests of the Town to amend regulations for the operation of golf carts on public streets within the Town, and desires to amend its Code to comply with recently revised legislative changes relating to the operation of golf carts on public roads; and

WHEREAS, the Town of Montverde has advertised as required by law for a public hearing prior to adoption of this Ordinance; and

WHEREAS, the Town Council of the Town of Montverde, Lake County, Florida hereby finds and declares that the adoption of this ordinance is necessary, appropriate, and in the public interest of the citizens of this community.

NOW THEREFORE, BE IT ORDAINED BY THE TOWN COUNCIL OF THE TOWN OF MONTVERDE, LAKE COUNTY, FLORIDA AS FOLLOWS:

Section 1. Recitals.

The above recitals are true and correct and, by this reference, are hereby incorporated into and made an integral part of this ordinance.

Section 2. Definition of golf cart.

That Sec. 24-60, Article IV, Chapter 24, of the Montverde Code of Ordinances is hereby amended to read as follows:

Sec. 24-60. Definition of golf cart

Pursuant to Section 316.003(26), *Florida Statute*, a “golf cart” is defined as a motor vehicle designed and manufactured for operation on a golf course for sporting or recreational purposes.

Section 3. Authorization to operate golf carts.

That Sec. 24-61, Article IV, Chapter 24, of the Montverde Code of Ordinances is hereby amended to read as follows:

Sec. 24-61. Authorization to operate golf carts

- (a) Golf carts meeting the definition set forth in the previous section may be operated on all of the public roads and streets within the corporate limits of the Town of Montverde where the posted speed is 30 mph or less, except as specified below:
 - (1) Golf carts are prohibited from operating on Fosgate Road.
 - (2) Until such time as Lake County approves, golf carts are prohibited from operating on CR 455, and Ridgewood Avenue, except at controlled intersections specified in a resolution adopted by Town Council. Each designated controlled intersection shall be posted with signage. Should Lake County approve golf carts operating on CR 455 and Ridgewood Ave, operation of golf carts within the CR 455 and Ridgewood Avenue roundabout shall be prohibited by the Town.
- (b) Golf cart operation on sidewalks is prohibited, except by town employees/agents performing official duties of the Town. The maximum speed on sidewalks is 15 miles per hour and the golf cart must be equipped with efficient brakes, reliable steering apparatus, safe tires, a rearview mirror, and red reflectorized warning devices in both the front and rear.
- (c) Golf cart operation within Town parks is prohibited, except by town employees/agents performing official duties of the Town. The town manager may designate golf cart parking within town parks, and if so designated, then golf carts are permitted within the designated golf cart parking area.
- (d) In accordance with Florida law, a golf cart may not be operated on public roads or streets by any person under the age of 44 18 unless he or she possesses a valid learner’s driver license or valid driver license.
- (e) In accordance with Florida law, a golf cart may not be operated on public roads or streets by a person who is 18 years of age or older unless he or she possesses a valid form of government-issued photographic identification.

Section 4. Hours of operation.

That Sec. 24-63, Article IV, Chapter 24, of the Montverde Code of Ordinances is hereby amended to read as follows:

Sec. 24-63. Hours of Operation

Golf carts shall only be permitted to operate on any street specified in Section 24-61 during the hours between sunrise and sunset, unless the golf cart is equipped with headlights, brake lights, turn signals, and a windshield as required by s.316.212, F.S.

Section 5. Conflicts And Ordinances Repealed.

All ordinances or parts of ordinances in conflict are hereby repealed.

Section 6. Severability.

If any section, sentence, phrase, word or portion of this Ordinance is determined to be invalid, unlawful or unconstitutional, said determination shall not be held to invalidate or impair the validity, force or effect of any other section, sentence, phrase, word or portion of this Ordinance not otherwise determined to be invalid, unlawful or unconstitutional.

Section 7. Codification.

It is the intent of the Town Council of the Town of Montverde that the provisions of this chapter shall become and made a part of the Town of Montverde Code of Ordinances; and grants authority to the codifier to renumber or re-letter sections, and change the words in this ordinance to section, article, chapter or such other appropriate word or phrase in order to accomplish such intentions.

Section 8. Effective Date.

This Ordinance shall become effective immediately upon adoption.

PASSED AND ORDAINED this ____ day of _____, 2025 at a regular meeting of the Town Council of the Town of Montverde.

Joe Wynkoop, Mayor

Attest:

Caroline Trepanier, Town Clerk

Approved as to form and legality:

Anita Geraci-Carver, Town Attorney

First Reading _____

Second Reading _____

Council Member _____ moved the passage and adoption of the above and foregoing Ordinance. Motion was seconded by Council Member _____ and upon roll call on the motion the vote was as follows:

	YEA	NAY
Bryan Rubio, Councilmember		
Grant Roberts, Councilmember		
Joe Morganelli, Councilmember		
Carol Womack, Vice Mayor		
Joe Wynkoop, Mayor		

Business Impact Estimate

*This form should be included in the agenda packet for the item under which the proposed ordinance is to be considered and **must be posted on the Town's website no later than the time notice of the proposed ordinance is published in the newspaper.***

ORDINANCE 2025-62

AN ORDINANCE OF THE TOWN OF MONTVERDE, LAKE COUNTY, FLORIDA; RELATING TO THE REGULATION OF THE OPERATION OF GOLF CARTS ON PUBLIC STREETS WITHIN THE TOWN OF MONTVERDE; AMENDING CHAPTER 24 OF THE MONTVERDE CODE OF ORDINANCES; PROVIDING FOR REPEAL OF ALL CONFLICTING ORDINANCES; PROVIDING FOR SEVERABILITY AND PROVIDING FOR AN EFFECTIVE DATE.

This Business Impact Estimate is provided in accordance with section 166.041(4), Florida Statutes. If one or more boxes are checked below, this means the City is of the view that a business impact estimate is not required by state law¹ for the proposed ordinance, but the Town is, nevertheless, providing this Business Impact Estimate as a courtesy and to avoid any procedural issues that could impact the enactment of the proposed ordinance. This Business Impact Estimate may be revised following its initial posting.

- ☐ The proposed ordinance is required for compliance with Federal or State law or regulation;
- ☐ The proposed ordinance relates to the issuance or refinancing of debt;
- ☐ The proposed ordinance relates to the adoption of budgets or budget amendments, including revenue sources necessary to fund the budget;
- ☐ The proposed ordinance is required to implement a contract or an agreement, including, but not limited to, any Federal, State, local, or private grant or other financial assistance accepted by the municipal government;
- ☐ The proposed ordinance is an emergency ordinance;
- ☐ The ordinance relates to procurement; or
- ☐ The proposed ordinance is enacted to implement the following:
 - a. Development orders and development permits, as those terms are defined in s. 163.3164, and development agreements, as authorized by the Florida Local Government Development Agreement Act under ss. 163.3220-163.3243
 - b. Comprehensive plan amendments and land development regulation amendments initiated by an application by a private party other than the municipality;

¹ See Section 166.041(4)(c), Florida Statutes.

- b. Sections 190.005 and 190.046, Florida Statutes, regarding community development districts;
- c. Section 553.73, Florida Statutes, relating to the Florida Building Code; or
- d. Section 633.202, Florida Statutes, relating to the Florida Fire Prevention Code.

In accordance with the provisions of controlling law, even notwithstanding the fact that an exemption noted above may apply, the Town hereby publishes the following information:

1. Summary of the proposed ordinance (must include a statement of the public purpose, such as serving the public health, safety, morals and welfare): The ordinance amends an existing code provision regulating the use of golf carts pursuant to s.316.003, Florida Statutes. The ordinance clarifies that golf carts may operate on all the public roads and streets within the Town where the posted speed is 30 mph or less, except on County roads until Lake County provides authority for their operation on County roads. The ordinance further prohibits use of golf carts on sidewalks, and prohibits within Town parks unless employees/agents performing official duties of the Town within the park. The town manager is authorized to designate golf cart parking within the Town parks, and if so designated, then use of golf carts in the designated parking area is permitted. Finally, the ordinance is updated to comply with revisions to Florida law relating to the minimum age to operate a golf cart and required equipment if operating during hours other than between sunrise and sunset. The ordinance protects the public health, safety and welfare within the Town limits in the Town's exercise of its police powers.

2. An estimate of the direct economic impact of the proposed ordinance on private, for-profit businesses in the Town, if any: No economic impact.

(a) An estimate of direct compliance costs that businesses may reasonably incur; No costs of compliance.

(b) Any new charge or fee imposed by the proposed ordinance or for which businesses will be financially responsible No new charge or fee is imposed by the ordinance; and

(c) An estimate of the [City's/Town's/Village's] regulatory costs, including estimated revenues from any new charges or fees to cover such costs. No regulatory costs are incurred. No revenues are generated as there are no new charge or fee being imposed by the ordinance

3. Good faith estimate of the number of businesses likely to be impacted by the proposed ordinance: No impact on businesses.

4. Additional information the governing body deems useful (if any):

The proposed ordinance is a generally applicable ordinance that applies to all persons similarly situated individuals as well as businesses and, therefore, to the extent it affects businesses, the proposed ordinance does not affect only businesses.

ACM Bonilla,

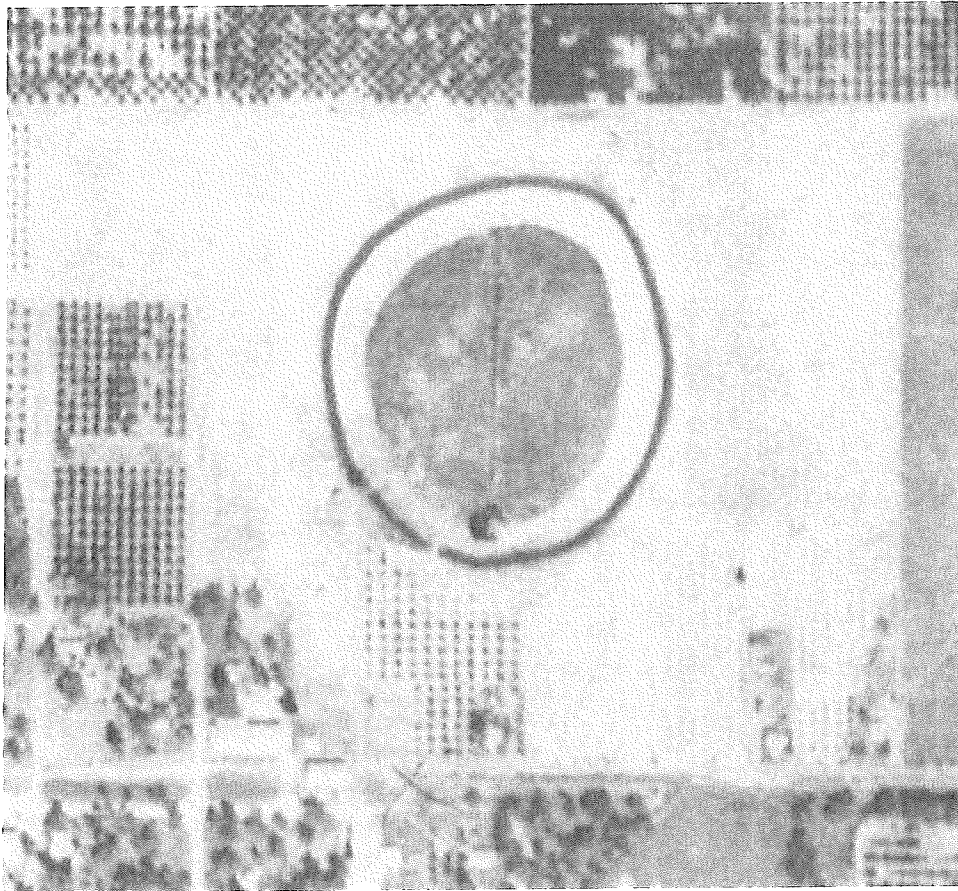
During late October, Water Resources staff conducted an initial field visit and digital review of the Franklin Lake (aka Crooked Lake -aka- Sawgrass Pond), a 5.89-acre waterbody located within the municipal jurisdiction of the Town of Montverde (ALT KEY 3883692). The lake is classified as surface waters of the State of Florida. We offer our findings below.

In 1941 the pond exhibited aquatic plant coverage of approximately 100% of the surface area of the wetland with no open water available. Citrus production groves begin to encroach along the western shoreline while uplands remained natural and wooded. According to an aerial photograph taken at this time, it appears the lake's plant biomass would be primarily comprised of aquatic grasses (typical of ephemeral wetlands that seasonally dry/inundate).

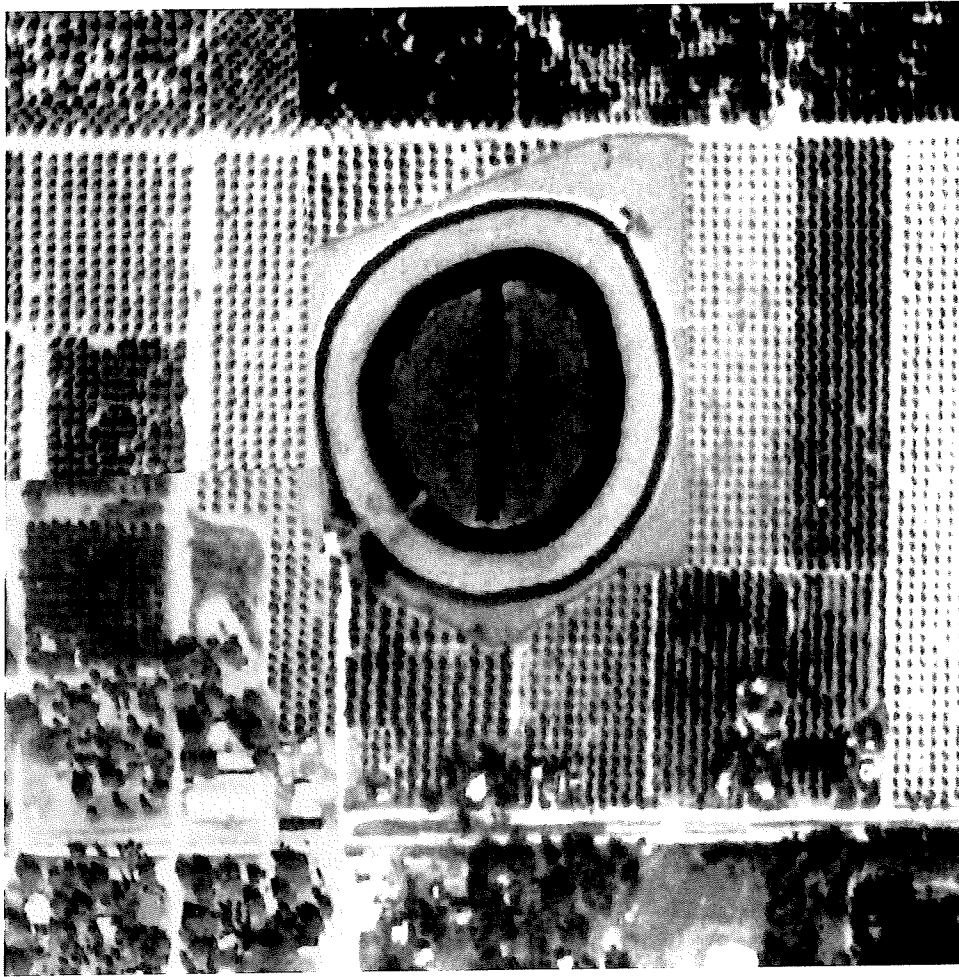


As we advance in our historic timeline, 6 years later in 1947 the pond appears to have been excavated eliminating plant loading issues. A "rim ditch" now appears around the edge of

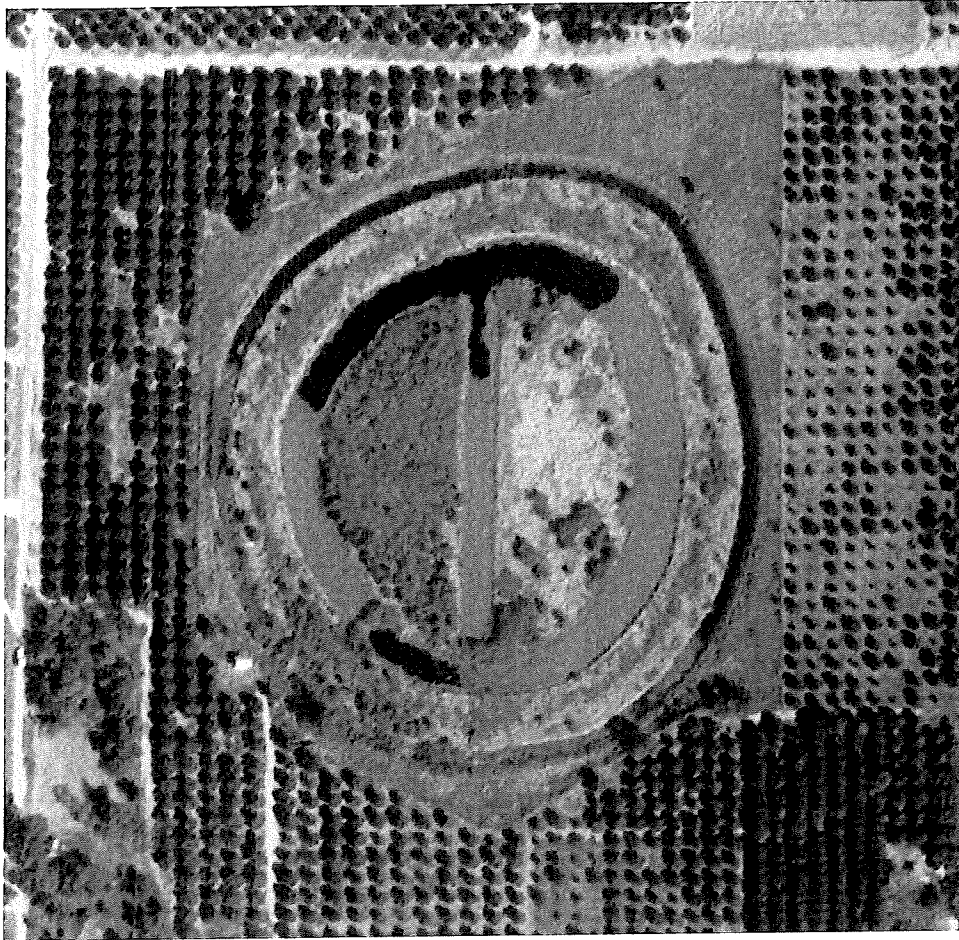
the feature. It is likely this ditch assisted with ongoing cattle or crop irrigation needs. The natural or wooded western shore has completely been removed and cleared of all forested uplands adjacent to the waterbody and leveled for expansion of the local citrus industry.



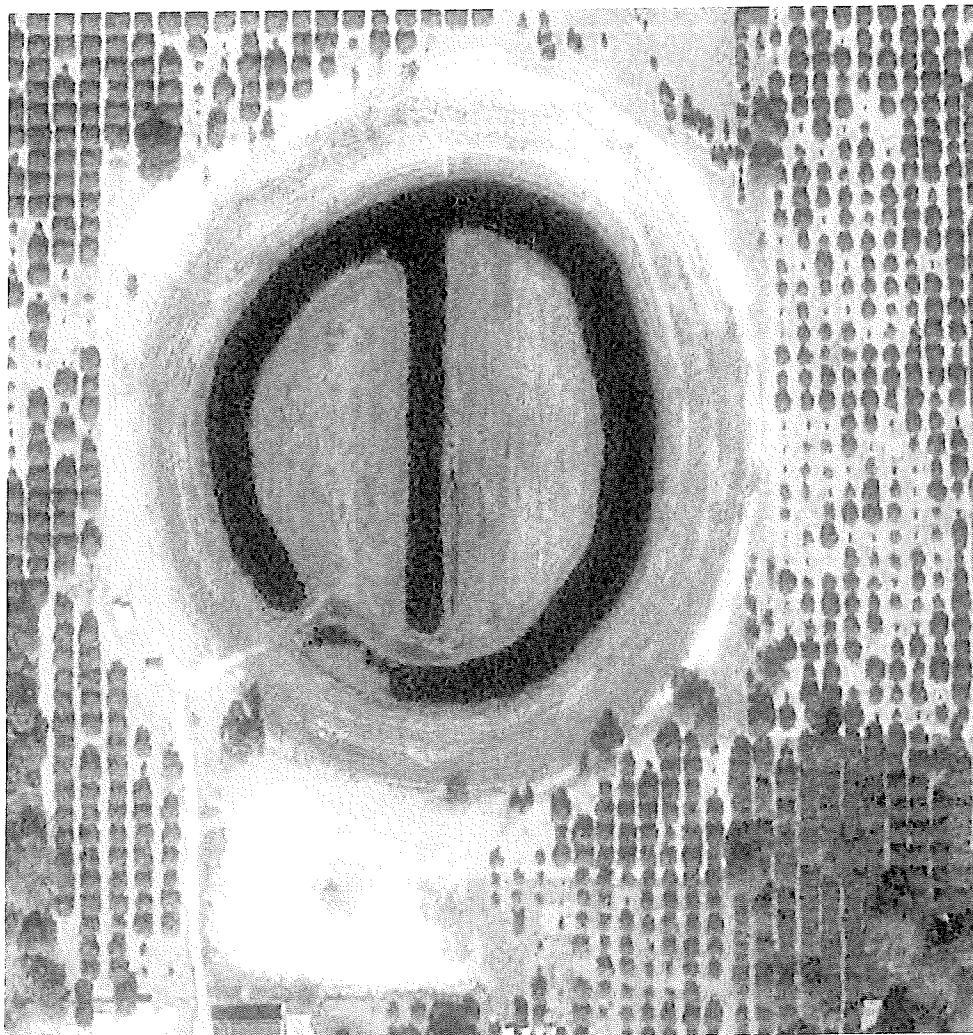
In 1958 the citrus industry is in full swing in the area with groves completely surrounding the waterbody. More excavation has taken place, and a larger effort has been undertaken to install a secondary, circular storage canal. A linear strip of material was removed directly through the middle of the feature. This photo indicates the depth of the excavation, or lack thereof, wasn't substantial enough to prohibit plant loading or retention of enough water for production use at this time. The first dwelling or structure appears at the "8:00" mark.



In 1972 the pond is performing its intended function of retaining water, though plant loading issues have reappeared within the majority of the system. The citrus groves have matured and are thriving. Successful production of citrus has now been underway for approximately 31 years, receiving unknown compounds of fertilizers & pesticides; fungicides, insecticides, and herbicides, etc.



In 1979 it appears further site work to maintain access and use of the pond has been undertaken to address downslope erosion, regain storage capacity, and smoothly shape a more friendly declining slope. A secondary structure appears at the "8:00" mark during this photograph.



By 1998 residential structures occupy the area after citrus crop production has been exhausted. Seven homes now exist within the pond's vicinity, along with the installation of several new access roads. It appears during the 19-year transition, from 1979 to 1998, extensive efforts were undertaken to remove the center island and mote type feature from the waterbody. Shoreline plants remain absent to the littoral zone of the feature.



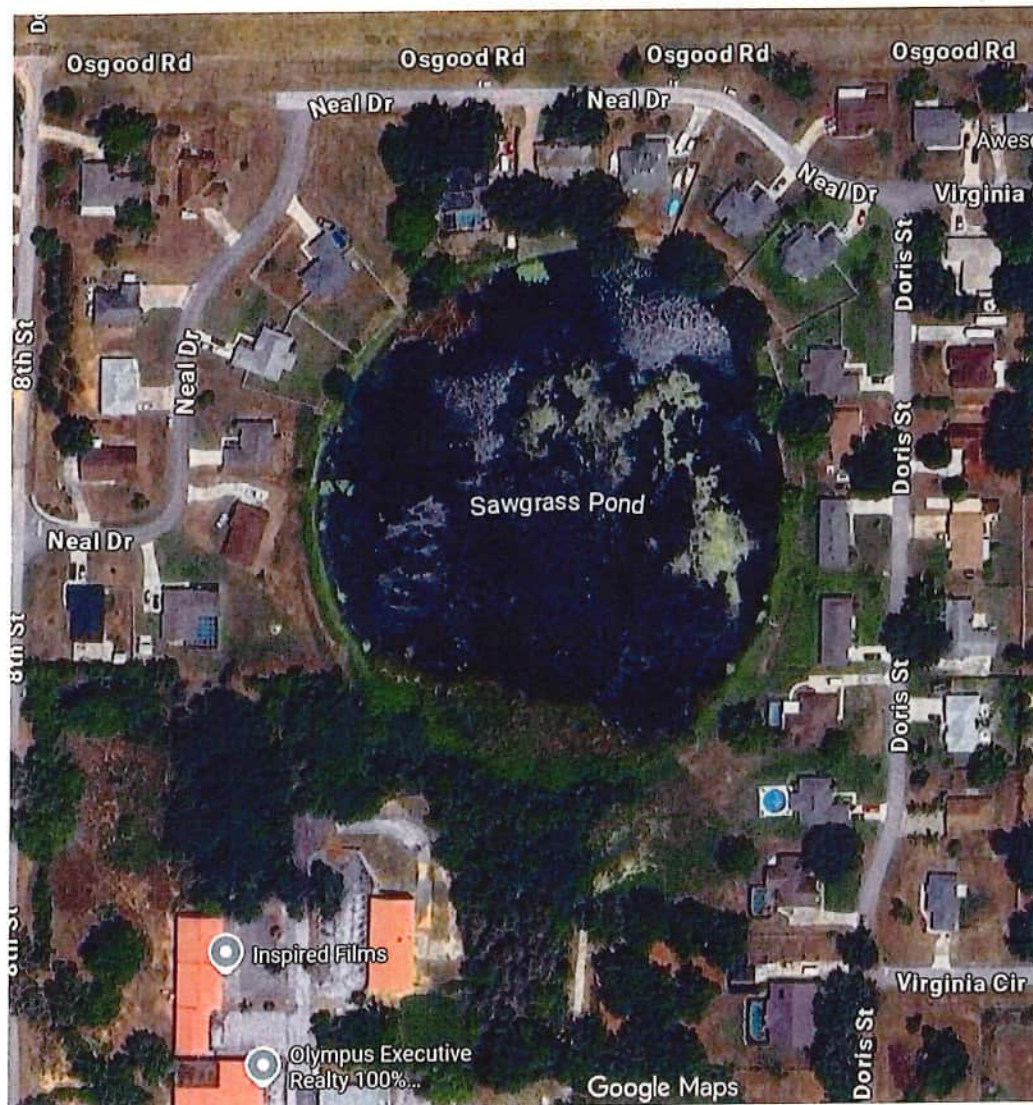
From 1998 to current, the development to the adjacent uplands increased to approximately 18 total dwellings within the immediate slope area. Each dwelling and street system has some form of runoff to the waterbody. The main sources of contamination are highly likely to be legacy loading (excess nutrient loading resulting from grove production fertilization) to modern fertilizer applications to residential turf. This practice is evident by the appearance of the vibrant green turf grasses shown in the following photograph.

The soils, from the shoreline edge to the street, are classified as Lake Sands and have no restrictive horizon present until >80" in depth, meaning the immediate area is excessively well drained and xeric (exhibiting a 20 - 50 inch/hour percolation rate). This percolation rate allows both stormwater and nutrients, if present, to swiftly infiltrate the system.

Adding to the referenced 85 years of disturbance the topographical lay of the adjacent uplands in comparison to the water feature exhibits a slope is roughly around 6%. Runoff

velocity increases sharply around 6%, so nutrient transport risk rises if buffering shoreline and upland vegetation is sparse/non-existent.

Currently (2025) we see the culmination of 85-years of disturbance and negative effects in the form of exponential and rapid aquatic plant infestations, algal blooms, loss of clarity, high total suspended solids, etc. add up to the current state of the lake. These ecosystems typically do not support healthy fisheries or the biodiversity needed for quality aquatic systems.



Upon a secondary field review conducted in mid-November during cold air and water temperatures, we found an extremely clear water column void of any active algae blooms or infestation (typical of cooler months and shorter photoperiods). We also made note of the presence of native and non-native plant species along its margins; Torpedo Grass,

Pennywort, Cattail, Southern Naiad, dormant Filamentous Algae, Black Willow, Primrose Willow, Spatterdock, Cuban Bullrush, Fragrant Waterlily, etc. The remanent of the once "rim-ditch" is evident and appears as a swell below gradient of the residential structures surrounding the lake margin, allowing for the capture of downslope runoff and potentially, attenuation of modern nutrient loading to the system.



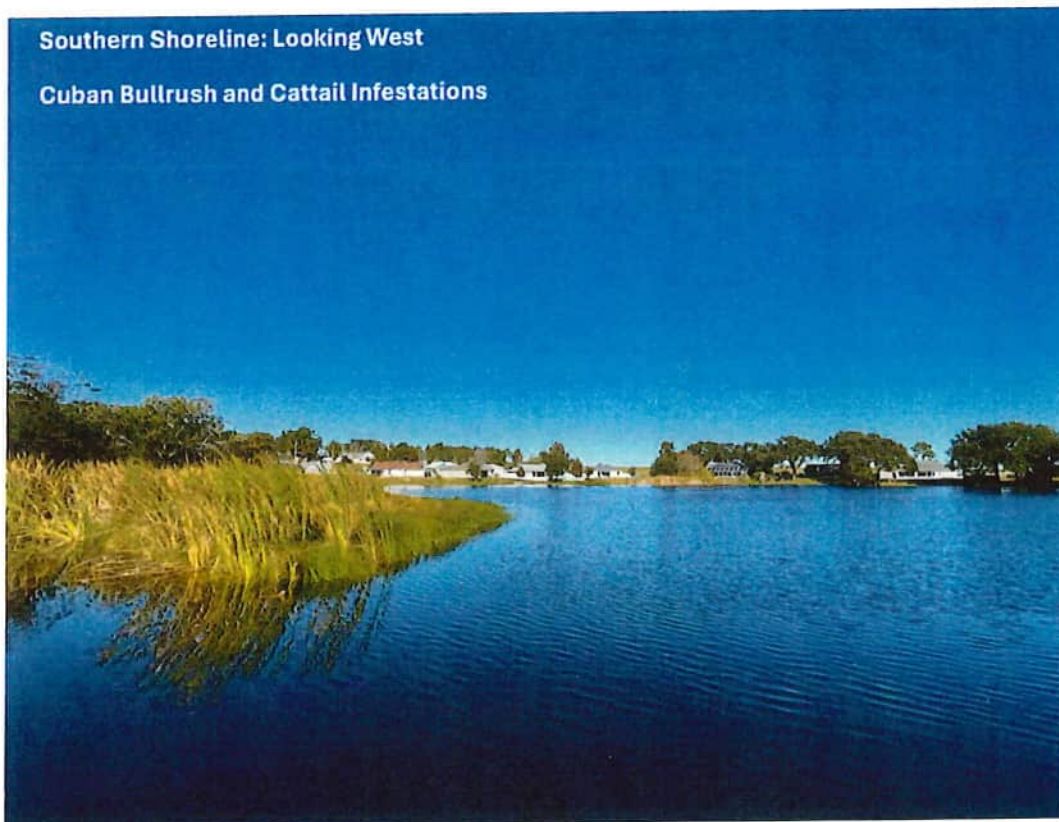
SE Shoreline: Looking North

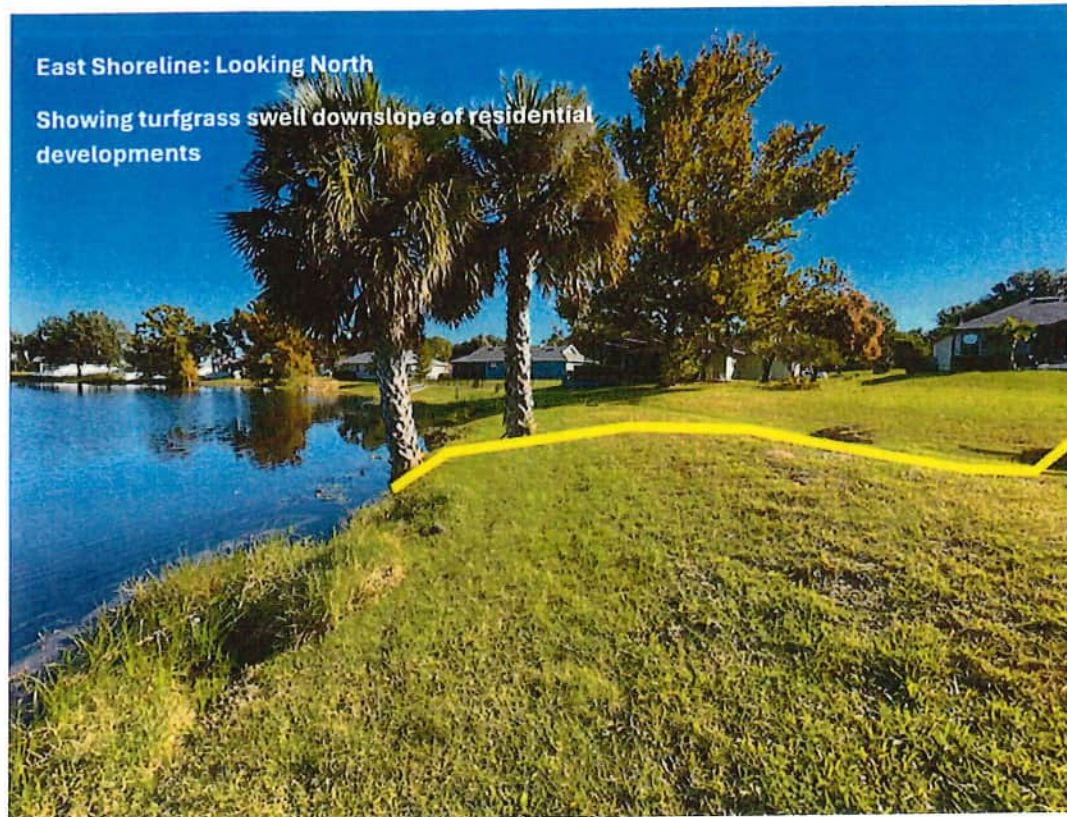
**Turf Grass, Fragrant Waterlily, Spatterdock,
Torpedo Grass, Cattail, Pennywort**



Southern Shoreline: Looking West

Cuban Bullrush and Cattail Infestations





Currently the aquatic system is in fairly acceptable condition. Aquatic life was observed within the system with fish and wading birds present. It is recommended that the infestations of Cuban Bullrush, Torpedo Grasses, and Cattail be chemically or mechanically treated. Further prevention to capture runoff or attenuate nutrients from upslope point sources should be installed/practiced for additional control measures against pond turnover. This effort could be in the form of strict turf fertilizer measures and street/curb inlet media additives such as EutroSORB or similar. Shoreline plantings or restoration typical to these ecosystems should be considered to further prevent nutrient loading to the system and to supply or increase diversity within the native plant communities. It is up to the diligence and efforts of the residents which surround the waterbody to keep the system in the condition in which it was last observed and prevent further eutrophication.

Yours in conservation,

Justin

1 **JOINT PLANNING AREA AGREEMENT**
2 *(Lake County and the Town of Montverde)*

3
4 This **JOINT PLANNING AREA AGREEMENT** is made by and between the TOWN OF
5 MONTVERDE, (the “TOWN”) and LAKE COUNTY, Florida, a political subdivision of the State
6 of Florida (the “COUNTY”).

7 **PREAMBLE**

8 **WHEREAS**, the TOWN and the COUNTY recognize that proper intergovernmental
9 cooperation and coordination are essential for sound growth management; and

10 **WHEREAS**, the TOWN and the COUNTY seek to have compatible land uses adjacent to
11 their common boundaries, and ensure meaningful communication and evaluation during
12 development review by establishing a coordinated process; and

13 **WHEREAS**, pursuant to Part II of Chapter 163, Florida Statutes, the Community Planning
14 Act (the “Act”), the TOWN and the COUNTY adopted and subsequently amended Comprehensive
15 Plans (the “Comprehensive Plan(s)”); and

16 **WHEREAS**, the TOWN’s and the COUNTY’s Comprehensive Plans contain goals,
17 policies, and objectives that call for the creation of interlocal agreements which deal with
18 annexations, services delivery, and joint land use planning; and

19 **WHEREAS**, the TOWN and the COUNTY recognize that joint planning for the growth
20 and development of their respective jurisdictions regarding all matters of common impact and
21 interest is consistent with State law and serves the public interest; and

22 **WHEREAS**, the TOWN and the COUNTY are desirous of engaging in joint efforts to
23 comprehensively plan certain areas within the municipal limits of the TOWN of Groveland and as
24 well as certain areas located adjacent to or in proximity of the municipal limits, all within the
25 boundaries of Lake County, Florida (the “Joint Planning Area” or the “JPA”); and

26 **WHEREAS**, the TOWN and the COUNTY seek to have compatible land uses adjacent to
27 their common boundaries; and

28 **WHEREAS**, the TOWN and the COUNTY wish to agree on certain procedures for the
29 timely review and processing of annexation and development proposals within the JPA; and

30 **WHEREAS**, there is no intent for this Agreement to restrict the TOWN’s authority to
31 amend its Comprehensive Plan, Official Zoning Map, or apply land development regulations
32 consistent with the provisions contained herein, or otherwise to make land use decisions for lands
33 within the corporate boundaries of the TOWN or within the JPA should the TOWN annex such
34 lands; and

1 **WHEREAS**, there is no intent for this Agreement to restrict the COUNTY's authority to
2 amend its Comprehensive Plan, Official Zoning Map, or apply land development regulations
3 consistent with the provisions contained herein, or otherwise to make land use decisions for
4 unincorporated areas within the JPA; and

5 **WHEREAS**, this joint planning agreement (this "Agreement") will provide a basis for the
6 evaluation of future development applications and annexation proposals as well as for the adequate
7 provision of public services; and

8 **WHEREAS**, the TOWN and the COUNTY wish to identify a joint planning area and have
9 determined that a joint planning agreement will foster intergovernmental coordination and
10 cooperation, economical provision of services, including utilities, and adequate utilization of
11 existing and proposed infrastructure; and

12 **WHEREAS**, this Agreement provides the TOWN and the COUNTY with ample
13 opportunities for renegotiation in response to changed circumstances, including the ability to see
14 refinement or expansion of the Joint Planning Area; and

15 **WHEREAS**, public hearings with due public notice have been held by the TOWN and the
16 COUNTY prior to approval of this Agreement and as set forth in Section 163.3171(3), Florida
17 Statutes; and

18 **WHEREAS**, it is the intent of the TOWN and the COUNTY that this Agreement shall be
19 immediately applicable to any issuance of a Development Order, as defined in Article II of this
20 Agreement, for a parcel of land located in the JPA, and submitted to the TOWN or the COUNTY
21 after the effective date of this Agreement; and

22 **WHEREAS**, this Agreement will facilitate the flow of information regarding land
23 development issues between the TOWN and the COUNTY; and

24 **WHEREAS**, Florida municipalities possess Municipal Home Rule Powers pursuant to
25 Article VIII, Section 2(b) of the Florida Constitution and Section 166.021, *Florida Statutes*; and

26 **WHEREAS**, the COUNTY possesses Home Rule powers pursuant to Article VIII, Section
27 1(b), of the Florida Constitution and Section 125.01, *Florida Statutes*; and

28 **WHEREAS**, the stated purpose of the Florida Interlocal Cooperation Act of 1969, Section
29 163.01, *Florida Statutes*, is to "permit local governmental units to make the most efficient use of
30 their powers by enabling them to cooperate with other localities on a basis of mutual advantage
31 and thereby to provide services and facilities in a manner and pursuant to forms of governmental
32 organization that will accord best with geographic, economic, population, and other factors
33 influencing the needs and development of local communities."; and

34 **WHEREAS**, the TOWN and the COUNTY find that the benefits of intergovernmental
35 communications and coordination will accrue benefit to its respective citizens.

1 **WHEREAS**, this Agreement is entered into pursuant to the authority of Article VIII of the
2 Florida Constitution and Sections 125.01, 163.3171, 163.3177, and 166.021, *Florida Statutes*.

3 **NOW THEREFORE**, in consideration of the mutual covenants set forth herein and in the
4 Agreement, the receipt and sufficiency of which are hereby acknowledged, the TOWN and the
5 COUNTY agree with each other to create and participate in this Agreement as follows:

6 **ARTICLE I – INCORPORATION OF PREAMBLE**

7 The preamble above is true and correct and is incorporated into this Agreement as if fully set forth
8 below. This Agreement shall be considered an interlocal agreement pursuant to the authority given
9 to the TOWN and the COUNTY, including the authority found within, but not limited to, Sections
10 163.01, 163.3171, and 163.3177(6)(h)1.a., *Florida Statutes*, as well as Chapter 125, Chapter 166
11 and Chapter 171, *Florida Statutes*, and the Constitution of the State of Florida.

12 **ARTICLE II – DEFINITIONS**

- 13
- 14
- 15 1. Act. Means the “Community Planning Act” set forth in Section 163.3161 et. seq., *Florida*
16 *Statutes*, as the same may be amended or superseded from time to time.
- 17
- 18 2. Agreement. Means this Agreement as the same may be amended or supplemented as
19 provided for herein.
- 20
- 21 3. County. Means Lake County, Florida, a political subdivision of the State of Florida.
- 22
- 23 4. County Commission. Means the elected legislative governing board of Lake County.
- 24
- 25 5. County Comprehensive Plan. Means the comprehensive plan of the COUNTY adopted
26 pursuant to the Act, as amended from time to time.
- 27
- 28 6. Development. Means development as set forth in Sections 163.3164(14) and 380.04,
29 *Florida Statutes*, as amended or superseded from time to time.
- 30
- 31 7. Interlocal Service Boundary Agreement or ISBA. Means the agreement adopted by the
32 County Commission pursuant to Lake County Ordinance No. 2010-46, as subsequently
33 amended by Lake County Ordinance No. 2024-22.
- 34
- 35 8. Joint Planning Area or JPA. Means those areas depicted in **Exhibit A**.
- 36
- 37 9. JPA Map. Means and refers to the map attached hereto and incorporated herein by
38 reference as **Exhibit A**, which designates parcels of land encompassed by this Agreement.
- 39

10. Land Development Regulations. Means ordinances enacted by the TOWN or the COUNTY for regulation of any aspect of land development, as further defined in Section 163.3164(26), *Florida Statutes*, as amended or superseded from time to time.
11. Local Planning Agency or LPA. Means the respective recommending agencies appointed by the Town Council or County Commission to review Comprehensive Plan and Land Development Regulation amendments and designated as the “Local Planning Agency or LPA” pursuant to Section 163.3174, *Florida Statutes*. The TOWN LPA is currently the TOWN Planning and Zoning Commission. The COUNTY LPA is currently the Lake County Planning and Zoning Board.
12. Parcel of Land. Means any quantity of land capable of being described with such precision or exactness that its location and boundaries may be established, which is designated by the TOWN, by the COUNTY, or by its owner or developer as land to be used or developed as a unit or which has been used or developed as a unit.
13. Town. Means the Town of Montverde, a Florida municipal corporation.
14. Town Comprehensive Plan. Means the comprehensive plan of the TOWN adopted pursuant to the Act, as amended from time to time.
15. Town Council. Means the elected legislative governing board of the Town of Montverde.
16. Unincorporated JPA. Means the area of the JPA that is not currently within the municipal limits of the TOWN, as depicted in **Exhibit A**.

ARTICLE III – CREATION OF JOINT PLANNING AREA

1. Joint Planning Area Created. The geographical area identified in **Exhibit A**, attached hereto and incorporated herein by reference, shall be designated as the Joint Planning Area (JPA).
2. Incorporation of Boundaries. The TOWN and the COUNTY will use their best efforts to incorporate the boundaries of the Joint Planning Area into the Future Land Use Maps of their respective plans and to include the terms and conditions stated herein. The TOWN and the COUNTY will use their best efforts to amend their Land Development Regulations to incorporate the terms and conditions stated herein. The TOWN and the Council will use their best efforts to implement the ideas set forth in Article V hereof.
3. Comprehensive Plans.
 - A. It is the intent of the TOWN and the COUNTY that the Comprehensive Plans of the TOWN and the COUNTY shall ensure that the lands in the Joint Planning Area are developed consistent with development within the TOWN or as otherwise provided for in this Agreement, and, at the same time, develop in a way that will

1 ensure efficient provision of public infrastructure and services in this area; provided
2 however, that the Ferndale Special Area, more particularly identified in **Exhibit B**,
3 attached hereto and incorporated here by reference, shall be governed by the Lake
4 County Comprehensive Plan pursuant to the ISBA

5
6 B. The Comprehensive Plan amendments contemplated herein shall cover growth
7 management issues and may include, but are not limited to, the following topics:
8

- 9 1. Timing of Urban Growth
- 10 2. Density of Urban Areas
- 11 3. Provision of Utilities
- 12 4. Environmental Resource Management
- 13 5. Annexation
- 14 6. Innovative and flexible planning such as clustering and open space
15 provisions
- 16 7. Transportation Planning
- 17

18 4. Planning Standards.
19

20 A. If the COUNTY creates a land development overlay district, the TOWN shall be
21 consulted and allowed to formally comment on the proposed district and
22 associated regulations to ensure an orderly transition of land development between
23 the TOWN and the COUNTY.
24

25 B. It is the intent of the TOWN and the COUNTY that any proposed Land
26 Development Regulation of the TOWN or the COUNTY shall ensure that the lands
27 in the JPA are developed consistent with development within the TOWN, except
28 for the lands within the Ferndale Special Area identified in the ISBA, including
29 application of the following standards:
30

- 31 1. Residential development consisting of more than four residential units
32 per net buildable acre must have a mix of lot sizes and lot shapes;
- 33
- 34 2. Fences must be at least fifty-percent transparent allowing air and light
35 to pass through.
36

37 C. The TOWN and the COUNTY agree that properties within the JPA, whether
38 incorporated or unincorporated except for the lands within the Ferndale Special
39 Area as identified in the ISBA, should not be allowed to develop at a greater density
40 than two dwelling units per one (1) gross buildable acre, and no less than 50% of
41 the gross buildable area of the entire site must be preserved as common open space;
42 provided, however, that nothing herein shall prevent the COUNTY from approving
43 higher densities consistent with the COUNTY's Comprehensive Plan or Land
44 Development Regulations or honoring existing entitlements on properties within
45 the JPA Boundary.

1
2 D. The TOWN and the COUNTY agree that any proposed nonresidential development
3 on properties within the JPA, whether incorporated or unincorporated, will be
4 jointly reviewed and discussed by the TOWN and the COUNTY. The TOWN
5 requests that development be limited to the following nonresidential uses: hospital,
6 medical, office, churches, family day care homes, retail sales, restaurant, personal
7 service establishments, government buildings/uses, golf course driving ranges
8 within the JPA boundaries. The COUNTY shall encourage applicants to limit uses
9 as requested by the TOWN, but nothing herein shall prevent the COUNTY from
10 making land use decisions as set forth in Paragraph 4.E below. Notwithstanding the
11 provisions contained in this subsection, these limitations on intensities are not
12 applicable to properties with vested rights.
13

14 E. Notwithstanding anything to the contrary within this Agreement, the parties hereby
15 agree and acknowledge that the State of Florida is a property rights' state pursuant
16 to Section 70.002, *Florida Statutes*. To the extent practicable, the parties will seek
17 to abide by the density and intensity requirements set forth under this Agreement;
18 provided, however, that nothing herein shall restrict the COUNTY from exercising
19 its authority to amend its Comprehensive Plan, Official Zoning Maps, or apply land
20 development regulations consistent with the provisions contained herein, or
21 otherwise to make land use decisions for the unincorporated areas within the JPA
22 if such decisions are necessary to protect private property rights or to prevent
23 litigation against the COUNTY by property owners seeking to enforce such private
24 property rights.
25

26 5. Water and Wastewater Utilities. Upon receipt of an application for a development order
27 for properties within the JPA, the COUNTY will require the applicant to meet with the
28 TOWN for the purpose of discussing municipal utilities. The COUNTY shall include a
29 provision within the approved development order that a connection to municipal utilities
30 (if the existing water line is within 300 feet of the development property boundary or the
31 existing sewer line is within 1000 feet of the development property boundary) is required
32 under one of the following conditions:
33

34 A. The property is permitted to seek land use and zoning approvals from the COUNTY
35 and to develop the property under the COUNTY's approved development plan prior
36 to annexation. Such development shall include, but not be limited to, pulling
37 permits, commencing and completing vertical and horizontal site work, platting and
38 obtaining certificates of occupancy and completion. A Covenant to Annex may be
39 executed and recorded setting forth this requirement; provided it shall also allow
40 the property owner to commence, continue or complete development prior to
41 annexation at its discretion. During the time the property owner applies to annex
42 and is being processed for final approvals by the TOWN, the COUNTY shall be
43 able to continue to issue permits and take related actions under any approved
44 development order.
45

1 B. The property owner voluntarily applies to annex under Section 171.044, Florida
2 Statutes. At time of annexation, an equivalent Town Future Land Use and zoning
3 designation is assigned unless a formal land use and/or zoning map amendment are
4 proposed by the property owner to change the COUNTY's permitted
5 intensity/density.
6

7 C. The TOWN and the property owner agree that annexation is not required but that
8 the property owner will connect to TOWN utilities and pay the same surcharge
9 assessed to other unincorporated residents/businesses that utilize the TOWN's
10 utilities.
11

12 In the event conditions (a), (b) or (c) cannot be satisfied, utilities will be considered
13 unavailable, and the developer can provide central utilities in lieu of connecting to
14 municipal utilities.
15

16 Notwithstanding the foregoing, the TOWN shall not extend utility lines within the Ferndale
17 Special Area and shall not annex properties within the Ferndale Special Area as both are
18 prohibited under the ISBA.
19

20 6. Annexation. The TOWN shall annex only lands as provided in this JPA, and where not in
21 conflict with the ISBA, and shall not annex any lands outside the JPA without amendment
22 of **Exhibit A** of this Agreement. Due to the low population within the TOWN's municipal
23 limits and its small geographic area within its municipal limits, the COUNTY agrees to
24 continue to maintain, regardless of any adjacent annexations, the collector roadways or
25 segments thereof, and associated drainage facilities within the JPA boundaries, unless
26 transferred under Section 7 below, with the exception of internal roadways or segments
27 thereof, and associated drainage facilities internal to a residential or non-residential
28 development annexed into the TOWN. Any new roads constructed by the COUNTY within
29 the municipal limits of TOWN, after execution of this Agreement, shall be maintained and
30 owned by the COUNTY, unless incorporated into a separate road transfer and maintenance
31 agreement entered into by the parties.
32

33 7. Right-of-Way.
34

35 A. The TOWN and the COUNTY may enter into a road transfer and/or maintenance
36 agreement(s) for COUNTY rights-of-way within the municipal limits, including
37 but not limited to County Road (CR) 455, Ridgewood Avenue, Seventh Street from
38 CR 455 to 1,300 feet south of Ridgewood Avenue and Blackstill Lake Road to
39 Fosgate Road.
40

41 B. The TOWN may, at the TOWN's expense, mow, and trim trees within the
42 COUNTY rights-of-way within the municipal limits without the need for a
43 maintenance agreement. The TOWN shall, to the extent permitted by Florida law,
44 indemnify and defend the COUNTY for any damage or injury caused by improper
45 tree trimming or roadside mowing.
46

C. Any signage and light poles installed by the TOWN or COUNTY within the rights-of-way within the JPA must be consistent with the Green Mountain Scenic Byway standards and the Town of Montverde standards for such improvements; provided, however, if the costs of signage and light poles to meet the Green Mountain Scenic Byway or TOWN standards exceeds what the COUNTY would normally pay to meet COUNTY standards, the TOWN must pay the cost differential to the COUNTY. If the TOWN declines to pay the cost differential, the COUNTY can install the COUNTY standard signage and light poles. However, if signage or light poles are being installed as a TOWN project, then the TOWN is responsible for the full cost. The TOWN will assume all increase maintenance costs incurred by the COUNTY for the upgraded lights.

D. The TOWN may make the following improvements within the COUNTY's right-of-way located within municipal limits upon receipt of a Right-of-Way Utilization Permit from the COUNTY:

- i. Driveway aprons with proper drainage improvements
- ii. Signs
- iii. Light Poles
- iv. Trails
- v. Sidewalks

All improvements must meet the requirements of the Florida Greenbook, latest edition, adopted by the Florida Department of Transportation (FDOT). Upon receipt of an approved Right-of-Way Utilization Permit, the TOWN shall accept all maintenance responsibility for the improvements and shall also accept all liability for any claims or damages caused as a result of such improvements.

Alternatively, the TOWN may, at the TOWN's option, request the conveyance of all or part of the County-owned right-of-way to the TOWN so that the TOWN owns and maintains such portions. Upon transfer of ownership and maintenance responsibility to the TOWN, the TOWN may install improvements as it deems necessary.

E. In exchange for the COUNTY continuing to maintain, regardless of annexations that take place, collector roadways or segments thereof, and associated drainage facilities within the JPA boundaries, the TOWN will use its best efforts to seek and obtain grant funding to assist the COUNTY with needed road improvements.

ARTICLE IV – PROCEDURES FOR REVIEWING AND COMMENTING ON DEVELOPMENT ORDERS

1. Forwarding of Development Order applications from the TOWN to the COUNTY and from the COUNTY to the TOWN.

- A. Annexation Notifications. Within ten (10) days of receiving an application for annexation for any property, the TOWN shall provide the COUNTY with initial notification of the request to annex, including a copy of the application and any other documentation provided by the applicant. Formal notification to the COUNTY under Section 171.044, Florida Statutes, shall follow at the appropriate date, and comply with statutory notice procedures.
 - B. Development Applications. The TOWN and the COUNTY, within ten (10) working days of receipt of any application or preliminary plans associated with an application for a Development Order within the JPA shall provide a copy of such application materials to the designated department, division, or office of the other party as is designated by the other party via written notice to the persons described in Article VI herein. The TOWN staff and the COUNTY staff must meet to discuss the effect of such development and comments in response to an application prior to the reviewing jurisdiction issuing written comments to the applicant, unless the parties mutually agree in writing that a meeting is unnecessary. Additionally, for any meeting with a pre-applicant or an applicant to be held by the TOWN or by the COUNTY, staff of the other party will be invited to participate. This subparagraph also applies to applications for annexation.
 - C. Response Deadlines. The TOWN staff and the COUNTY staff shall provide the TOWN or COUNTY, as applicable, with its comments on the matters above, within twenty (20) working days of receipt of a copy of any such application. The noted time frames may be extended by consent of both parties so long as the time frames within the TOWN's or the COUNTY's Land Development Regulations and applicable Florida Statutes are met. For major developments with regional impact, the TOWN and COUNTY shall jointly agree on time frames and meetings necessary for review and approval to ensure completeness of plans.
 - D. Notice of Public Hearing. If at any time the secondary jurisdiction shall consider the Development Order or application at a public meeting, the primary jurisdiction and the landowner or applicant shall be given notice of the time, date, and place of the public meeting.
 - E. Development Order Amendments. If an application for a modification of a Development Order is submitted, the secondary jurisdiction shall be afforded review pursuant to the review times described in this article.
2. Review of Development Applications. In addition to the evaluation and comments normally prepared by the TOWN or the COUNTY, any comments submitted by the other party in their review of the Development Order application shall be considered by the TOWN or the COUNTY having primary jurisdiction in its review of the Development Order, which shall include an examination of the relationship between the application, the TOWN's and the COUNTY's Comprehensive Plans, Land Development Regulations and this Agreement.

3. Covenant to Annex. When reviewing any Development Order plan(s) or application(s) for properties within the JPA that are bound by a TOWN covenant to annex, the TOWN staff shall provide review comments and forward such covenant to annex directly to the COUNTY. Formal review of said plan(s) or application(s) along with the permitting, inspection and the issuance of Certificates of Occupancy on such properties shall then be the responsibility of the COUNTY. Such properties shall meet the supplemental development criteria, if any, as stipulated in the TOWN's covenant to annex and related agreements, and any development regulations jointly adopted by the TOWN and the COUNTY for properties within the JPA. The COUNTY shall not issue a Certificate of Occupancy until the TOWN has approved all public infrastructure to be transferred to the TOWN pursuant to the terms established in the covenant to annex or related agreements and any additional TOWN requirements, including concurrency, have been met, which requirements shall be forwarded to the COUNTY as part of the Development Order application review process; provided, however, that nothing herein shall restrict the COUNTY from exercising its authority to issue a Certificate of Occupancy, especially if such decisions are necessary to protect private property rights or to prevent litigation against the COUNTY by property owners seeking to enforce such private property rights. See Paragraph 4.E. above.
4. Development Orders within the TOWN's portion of the JPA. The TOWN shall consider and shall use its best efforts to incorporate into any municipal development orders, the comments of the COUNTY for property annexed after execution of this Agreement.
5. General Staff Meetings. General meetings of the TOWN staff with the COUNTY staff will be held as often as needed to carry out the term of this Agreement.

ARTICLE V – SPECIFIC DEVELOPMENTAL AND ENVIRONMENTAL CONSIDERATIONS

1. Preservation of Density and Intensity: Ferndale Special Area. As set forth in the ISBA, it is the intent of the TOWN and the COUNTY to preserve the density and intensity of the properties within the Ferndale Special Area to the existing density and intensity prescribed in the 2030 Lake County Comprehensive Plan as amended and preserve the existing pattern of development.
2. Transfer of Development Rights Program. If the COUNTY develops a Transfer of Development Rights (TDR) Program for purposes of protecting and preserving low density rural lands, viewsheds, agricultural lands, or unique environmental features such as steep slopes, hydrological features, vegetation, and habitat, then the TOWN and the COUNTY will work together to evaluate lands that should be prioritized for preservation and conservation. Before land deemed as agriculture can be developed, both the TOWN and the COUNTY must jointly evaluate and discuss available options with the property owner and/or developer to transfer the development rights to a more suitable property closer to urban center and municipal services while still preserving the property owner/developers' property rights.

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3. Conservation Strategy. It is the intent of the TOWN and COUNTY to evaluate lands that should be prioritized for preservation and conservation. Data sources to be utilized include but are not limited to the Marxan Model data produced from Stetson University, the Florida Land Inventory (FNAI) Layers, and any additional overlays when making planning decisions within the JPA. It is the intent that if a property overlaps with areas identified in these data sets for consideration of protection or conservation, the TOWN and COUNTY will work together to best preserve areas when and where possible. Strategies discussed in the Lake County Conservation Strategy Summary shall be considered but additional strategies may also be utilized. The Conservation Strategy is attached hereto and incorporated herein by reference as **Exhibit B**.

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ARTICLE VI – GENERAL PROVISIONS

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1. Non-Exclusivity. Nothing herein shall prevent the parties from entering into other joint planning agreement with other municipalities.
2. Disclaimer of Third-Party Beneficiaries; Sole Benefit. This Agreement is solely for the benefit of the Parties hereto, and no right or cause of action shall accrue upon or by reason hereof, to or for the benefit of any third party. Nothing in this Agreement, either expressed or implied, is intended or shall be construed to confer upon or give any person, corporation or governmental entity other than the Parties any right, remedy or claim under or by reason of this Agreement or any provisions or conditions hereof, and all the provisions, representations, covenants, and conditions herein contained shall insure to the sole benefit of and shall be binding upon the Parties, and their respective representatives, successors and assigns.
3. Venue, No Waiver, and Remedies. Should the TOWN or the COUNTY seek judicial review of this Agreement, or to enforce this Agreement, the TOWN and the COUNTY recognize that venue will be properly located in Lake County, Florida. The failure of any party to this Agreement to enforce any provision contained herein shall in no event be deemed a waiver of its rights to thereafter enforce this Agreement. Utilization of one remedy to enforce this Agreement shall not be deemed the only method by which to enforce the provisions of this Agreement.
4. Severability. Construction and Interpretation. If any portion of this Amendment to the Agreement is declared invalid or unenforceable, then to the extent it is possible to do so without destroying the overall intent and effect of this Amendment to the Agreement, the portion deemed invalid or unenforceable shall be severed here from and the remainder of this Amendment to the Agreement shall continue in full force and effect as if it were enacted without including the portion found to be invalid or unenforceable. Consequently, it is the intent of the parties that no provision shall be more harshly construed against either party as the drafter hereof.
5. Effective Date. Prior to this Agreement, or any amendment hereto, becoming effective, it shall be approved and executed by both parties hereto, and pursuant to Section 163.01(11),

Florida Statutes, this Agreement shall become effective immediately after the filing of this Agreement with the Clerk of the Circuit Court of Lake County, Florida. This Agreement shall be recorded in the public records of Lake County, Florida, and the cost thereof, if any, shall be shared equally by both governing bodies.

6. Renegotiation. The COUNTY or the TOWN may call for renegotiation of this Agreement by written notice to the other party at any time. The TOWN and the COUNTY may renegotiate this Agreement in response to changed circumstances, to seek refinement, expand or contract the JPA boundary, or alter the designed time allowances as described in this Agreement. Upon such written notice, for a period of one hundred eighty (180) days thereafter, the TOWN and the COUNTY shall attempt to renegotiate this Agreement in good faith. During the one hundred eighty (180) day period, where either party, in its sole discretion and in good faith, determines that such renegotiations have reached an impasse, it may invoke the conflict resolution procedures set forth in Chapter 164, Florida Statutes. If no Agreement is negotiated during the one hundred (180) day period or during the conflict resolution process, the terms of this Agreement shall continue to govern and remain in full force and effect.

7. Termination and Amendment.

A. Termination.

1. This Agreement shall renew automatically after ten (10) years from the date of final adoption, and every ten (10) years thereafter, unless it is terminated pursuant to subparagraph (2) below.
2. Either party may terminate this Agreement for any reason upon providing 180 days written notice to the non-terminating party.

B. Amendment. This Agreement may be amended at any time provided both parties authorize said amendment.

C. Amendment or Termination of Agreement to be in Writing. Except as provided for herein, no amendment or termination of this Agreement shall be binding on either party unless a written instrument terminating or amending this Agreement is executed by the Mayor and County Commission Chairman after being duly authorized to do so by their respective governing bodies, and such termination or amendment shall not be effective until after it has been filed with the Clerk of the Circuit Court of Lake County, Florida. Except as set forth herein, all instruments amending or terminating this Agreement shall be recorded in the Public Records of Lake County, Florida.

8. Notice, Proper Form. Any notice to be provided hereunder to either the TOWN or the COUNTY by the other party shall be in writing and shall be deemed to be provided only by hand delivery for which a receipt is obtained or certified mail. Notice shall be addressed to the addresses set forth below or that a party may otherwise designate in the manner prescribed herein.

TOWN

Town Manager

Town of Montverde

P.O. Box 560008

17404 Sixth Street

Montverde, FL 34756

COUNTY

County Manager

Lake County Administrative Building

P.O. Box 7800

315 West Main Street

Tavares, FL 32778-7800

Either party to this Agreement may unilaterally amend the address or designee to whom notices are to be delivered by providing notice to the other party as provided herein.

9. Rules of Construction. As used in this Agreement, the plural includes the singular, and the singular includes the plural. Subtitles herein are used for ease in reading this Agreement, and do not form a substantive part of this Agreement for purposes of interpretation. This Agreement shall be liberally interpreted to achieve its goals and purposes.

10. Entire Agreement. This Agreement constitutes the entire understanding of the Parties with respect to the subject matters addressed herein, and all prior agreements, understandings, representations, and statements, oral or written, are superseded by this Agreement.

11. Authority. The Parties each represent and warrant to the other its respective authority to enter into this Agreement, acknowledge the validity and enforceability of this Agreement. The Parties hereby represent, warrant, and covenant this Agreement constitutes a legal, valid, and binding contract enforceable by the Parties in accordance with its terms and conditions, and that the enforceability is not subject to any impairment by the applicability of any public policy or police powers.

12. Other Agreements. The parties hereby agree that any previously effective joint planning agreements shall be terminated as of the Effective Date of this Agreement.

IN WITNESS WHEREOF, the parties hereto have made and executed this Agreement on the respective dates under each signature: the COUNTY through its Board of County Commissioners, signing by and through its Chairman, duly authorized to execute same by Board action on the ____ day of _____, 2025, and the TOWN through its Town Council, signing by and through its Mayor, duly authorized to execute same by Council action on the ____ day of _____, 2025.

**BOARD OF COUNTY COMMISSIONERS
LAKE COUNTY, FLORIDA**

Leslie Campione, Chairperson

This _____ day of _____, 2025.

ATTEST:

Gary J. Cooney, Clerk of the
Board of County Commissioners
of Lake County, Florida

Approved as to form and legality:

Melanie Marsh
County Attorney

TOWN OF MONTVERDE

Joe Wynkoop
Mayor

This ____ day of _____, 2025.

ATTEST:

Caroline Trepanier, Town Clerk

Approved as to form and legality:

Anita Geraci-Carver, Town Attorney

EXHIBITS

EXHIBIT A – JPA MAP SERIES

JPA Area

Municipal Boundary of the Town

Utility Service Boundary

Unincorporated Lake County

EXHIBIT B – CONSERVATION STRATEGY

EXHIBIT B: CONSERVATION STRATEGY

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LAKE COUNTY CONSERVATION STRATEGY SUMMARY



EAST CENTRAL FLORIDA REGIONAL PLANNING COUNCIL

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Introduction & Recap

Throughout late 2022 and 2023, Lake County engaged with both the East Central Florida Regional Planning Council (ECFRPC), the East Central Florida Regional Resilience Collaborative (ECFR2C), and Stetson University Water Institute to examine Lake County in terms of socio-environmental resilience. This effort was funded in part by the Florida Department of Environmental Protection's Resilient Florida program. As stated in **Natural Lands Inventory and Planning Strategies Review in Support of Resilient Green Space Conservation in Lake County, Florida**, socio-environmental resilience refers to five key guiding principles:

- 1) The maintenance and/or enhancement of the connectivity within existing green space corridors;
- 2) The protection of both the quality and the natural replenishment of groundwater and surface water systems;
- 3) The avoidance of new flood risks within the built environment, especially through minimization of natural wetland loss in future development;
- 4) The preservation of rare natural communities and hotspots of biodiversity; and
- 5) The strengthening of rural economies and livelihoods.

During the initial project, the ECFR2C hosted two stakeholder workshops in Lake County, held on December 15, 2022, and April 7, 2023. These workshops drew a combined total of 52 expert stakeholders from around the region. During the course of these workshops, experts ranked the Florida Natural Areas Inventory (FNAI) datasets as well as provided expert and local knowledge of ecosystem and environmental asset prioritization in Lake County. Below are the FNAI datasets that were utilized and ranked before running the Marxan Model.

	Environmental Features	Brief Description
1	Strategic Habitat Conservation Areas	<i>Areas identified as potential habitat for 62 species needing additional protections. Higher prioritization was given to higher quality habitat and rarity of the species.</i>
2	Rare Species Habitat Conservation Priorities	<i>Areas that provide habitat for 281 species that have conservation need, prioritized by rarity and diversity of species.</i>
3	Florida Ecological Greenway Network	<i>Landscape hubs, linkages, and corridors, with prioritization for links that promote connectivity for wide-ranging species, between existing reserves, and among riparian areas.</i>
4	Under-Represented Ecosystems	<i>Natural communities that do not have adequate representation within existing conservation lands, prioritized by global rarity.</i>
5	Natural Floodplain Function	<i>Ranks the ecological condition of identified 100-year floodplains, based on "naturalness" of the plant community and intensity of land use, with higher priority given to more natural areas.</i>
6	Surface Water Protection	<i>Ranks the landscape for factors impacting water quality in various categories of surface waters.</i>
7	Functional Wetlands	<i>Ranks wetlands based on vegetative and hydrologic integrity, with higher prioritization given to more natural areas.</i>
8	Groundwater Recharge	<i>Ranks importance of areas for impacting quality and quantity of groundwater recharge.</i>
9	Sustainable Forestry	<i>Identifies areas that are potentially suitable for pine-based forestry, with higher prioritization given to larger tracts, more mesic sites, and sites within 50 miles of a mill.</i>

Table 1. Environmental features used in the analysis.



Figure 1. Stakeholder Workshop #2

The Marxan spatial optimization software is one of the most utilized platforms for conservation-based planning. The software produces datasets that maximize habitat connectivity through already existing and potential future conservation land while also seeking the most cost-effective way to do so based on data and other inputs from the user such as conservation goals or targets. After the completion of both workshops and stakeholder expertise was utilized, the conservation targets were established, and the model was completed. The table below illustrates the percentage of the FNAI datasets that are currently conserved in Lake County and the conservation targets resulting from the workshops and subject matter expert feedback.

Environmental Features	Currently Conserved (%)	Marxan Conservation Targets (%)
Strategic Habitat Conservation Areas	74%	80%
Rare Species Habitat Conservation Priorities	61%	80%
Florida Ecological Greenway Network	46%	70%
Under-represented Ecosystems	59%	80%
Natural Floodplain Function	52%	60%
Surface Water Protection	35%	60%
Functional Wetlands	45%	50%
Groundwater Recharge	27%	50%
Sustainable Forestry	70%	70%

Table 2. Post-stakeholder-feedback conservation targets used in the analysis.

The Marxan model below (Figure 1) is the key outcome from this grant-funded initiative. It ranks currently undeveloped lands for potential inclusion within a resilient open space network in Lake County, FL. The rankings are ordered from highest priority (dark pink) to lowest priority (light pink), based on model input parameters (see Tables 1 & 2). Higher ranked areas tend to maximize connectivity of existing conservation lands at the lowest estimated cost, while lower ranked areas provide beneficial conservation opportunities, but with lower overall connectivity to existing conserved lands, and at generally higher estimated costs in comparison.

This map (Figure 1) is intended for general planning use only. It does not necessarily reflect the views or goals of Lake County Government, or any of its subagencies.

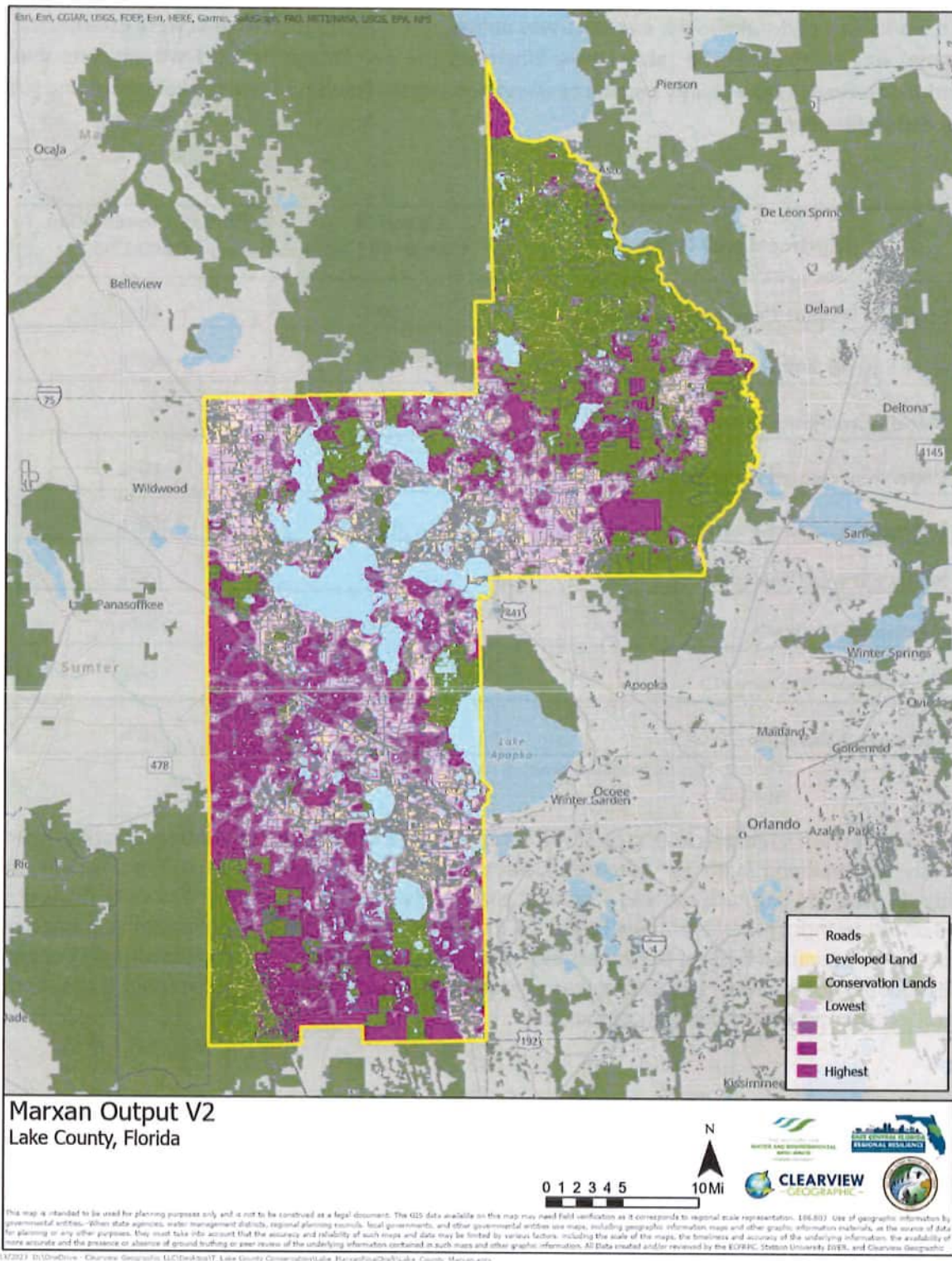


Figure 2. The final model generated using the Marxan program.

Conservation Strategies

Preface

Once the initial workshops were held and the grant period ended, to better utilize the results from the Marxam Model, listen to feedback from the residents, and utilize the results to help guide conservation-oriented planning and policy in the future. Pointed out in **Natural Lands Inventory and Planning Strategies Review in Support of Resilient Green Space Conservation in Lake County, Florida**, there are multiple ways to conserve natural lands while still fostering an environment for urban development.

In November of 2023, the East Central Florida Regional Planning Council hosted two workshops drawing about 45 residents over the course of both events. These workshops were identical in content, but conversations occurred naturally. During both workshops, mentimeter was utilized to gather the thoughts and views of the residents.

Through surveys and discussion, the ECFRPC engaged with residents to look at both the outputs from the Marxam model and prioritize areas and strategies that could be utilized to protect these areas. The two main topics identified in both workshops were the concern of the loss of rural land throughout the county and the municipalities within due to development and land use changes and the expansion of the Blueway network to include Cherry Lake through the Palatlahaha River up to the Harris Chain of Lakes. As a result of these conversations, combined with best practice considerations, a series of Conservation Strategies are recommended for consideration by Lake County and municipalities within.

County-City Partnership Approach to Environmental Connectivity

Conservation as a whole cannot be defined by jurisdictional lines. To reap the full benefits, both cities and counties must work together with property owners to best conserve Lake County to ensure greater connectivity. Currently, both Lake County and the municipalities within are working towards creating and updating Joint Planning Agreements. These planning documents will contain language for both the city and county to better plan and converse at the early stages of development. Additionally, these planning documents will continue to build and foster each municipal identity throughout Lake County. In areas of more than one jurisdiction, joint planning areas could be created to focus development in a sustainable manner to implement environmental connectivity.

Transfer of Development Rights

Throughout the engagement process, the implementation of a strong transfer of development rights (TDR) program across the county has been requested both at the staff and residential level. Lake County and the municipalities within have areas where development could be better suited in lieu of greenspace development. A transfer of development rights or density aggregation program could be used across multiple properties and/or jurisdictions to conserve and utilize open space and ecosystems appropriately while focusing future development in appropriate areas, taking advantage of existing infrastructure and reducing future financial implications to taxpayers and impacts on environmental resources.

Stated throughout the engagement with the residents of Lake County, moving development from the more rural areas and closer to urban centers was highly desired. Providing density bonuses in the form of additional units or stories closer to urban development or areas with lower priority for conservation in

exchange of conserving more rural or environmentally valuable areas could be a way to achieve these goals.

Though transfer of development rights can be complex in the State of Florida, there has been some great success cases. To gain a better understanding, Lake County is taking the next steps and partnering with both the ECFRPC and Stetson Law to further explore a transfer of development rights program and how it could function in Lake County. This project will explore both the advantages, barriers, and legalities of implementing a TDR program in the county to provide a better understanding for establishing a path forward to implementing this program.

Rural Protection Area

Rural Protection Areas (RPA) are defined as areas within the Lake County Future Land Use Map that are intended to remain rural. Both cities and counties have language in their comprehensive plans to protect and maintain these rural areas. From a conservation standpoint, rural areas provide great benefits for wildlife habitat and connectivity, carbon reduction, flood mitigation, groundwater recharge, and carbon reduction. In recent years, with greater pressures for development, the state has seen a reduction in its rural areas.

Currently, Lake County has several areas protected by policies within its Comprehensive Plan including the Wekiva-Ocala RPA, the Ferndale Community, the Yalaha-Lake Apopka RPA, the Green Swamp Area of Critical Concern, the Wekiva River Protection Area, the Wekiva Study Area, and the Emerald Marsh RPA. Policies within the Comprehensive Plan has been established to keep Lake County rural in these areas however, those protections do not protect against annexation. When further developing the Joint Planning Agreements, language to protect these land uses, regardless of city incorporation, should be included. By allowing for the conversations and establishing expectations prior to development agreements, rural lands can be better protected.

Lake County's Comprehensive Plan currently includes language regarding how rural lands should be developed. In order to maintain these protections, the JPA should include language that if the Interlocal Service Boundary Agreement (ISBA) intersects the RPA, the county's land use shall be considered. During the adoption process, cities which intersect the RPAs can consider updating their policies to include the conservation subdivision standards.

Conservation Subdivisions

Conservation subdivisions integrate both development and conservation in place. Instead of utilizing the more traditional approach to clearing a lot and building homes, this development pattern clusters homes on smaller lots, but the end result is the increase of shared green space. Highlighted in Lake County's Comprehensive Plan, the purpose of these regulations is to provide housing in a manner that also preserves agricultural and forestry lands, natural and cultural features, scenic viewsheds, and rural community character that would be at great risk of becoming lost through conventional development approaches, and which it is the policy to incorporate, to the greatest extent practicable, into an interconnected network of permanent greenway conservation lands adding both economic and environmental value to the proposed development and to the broader community. Cities in Lake County should look to mirror these standards highlighted in CHAPTER XVII, Lake County Code, entitled RURAL CONSERVATION SUBDIVISION DESIGN STANDARDS. By doing so, development can occur in the RPAs but be kept to a standard to preserve the rural lifestyle in these areas.

Would you consider owning a home with a smaller lot if more land was conserved?

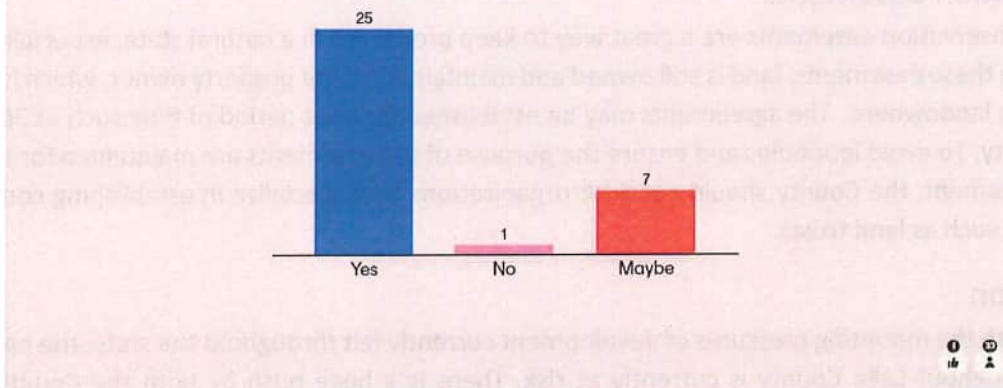


Figure 3. Results from Mentimeter.

Creation of a Blueway

Throughout both workshops, the residents of South Lake County expressed major interest in the creation of a Blueway from Cherry Lake through the Palatlahaha River up to the Harris Chain. Following the criteria from the Florida Department of Environmental Protection (FDEP), to create a Blueway, it must include the proper signage, launch points, and maintain a paddle trail. Currently, there are some launch points on this waterway; however, there are still some gaps in the trail. The completion of this Blueway will require the partnership and work of both city, county, and local partners who have expressed interest in working to complete the Blueway. Through working together with multiple partners, this vision could easily become a reality. Mentioned throughout the workshops, education is an important aspect when developing a conservation strategy. By creating new Blueways through Lake County, there is a perfect opportunity to educate residents and visitors, showcase native wildlife through the area, and encourage greater conservation efforts.

A More Traditional Approach to Conservation

Modeling results and stakeholder input identified some key areas that would aid in conservation connectivity. In order to achieve long-term conservation goals, this work was funded in part through a grant funded by the Florida Department of Environmental Protection's Office of Resilience and Coastal Protection Resilient Florida Program. Some of the identified areas may require acquisition through more traditional methods. The two most useful strategies are fee simple acquisition and conservation easements.

Fee Simple Acquisition

Fee simple acquisition is the most permanent yet expensive way to conserve land. This strategy requires purchasing the property for a fee with the acquiring jurisdiction or agency maintaining ownership or turning it over and partnering with a land trust. This is the most effective way to ensure that property is conserved; however, the cost and the maintenance of the property falls on the new owner. Without

dedicated yearly program funding for acquisition and maintenance, fee simple acquisition is difficult and is generally grant driven which may not be sustainable for the long-term.

Conservation Easements

Conservation easements are a great way to keep properties in a natural state, especially working lands. With these easements, land is still owned and maintained by the property owner, which is a benefit for working landowners. The agreements may be established for a set period of time such as 30 years, or in perpetuity. To avoid loopholes and ensure the purpose of the easements are maintained for the period of the agreement, the County should consider organizations that specialize in establishing conservation easements such as land trusts.

Conclusion

With the mounting pressures of development currently felt throughout the state, the natural land found throughout Lake County is currently at risk. There is a huge push by both the County and the municipalities within, as well as a push from the residents and additional partners to ensure Lake County remains “Real Florida. Real Close.”. Through the continuation of the Joint Planning Agreement process as well as additional efforts, Lake County will still foster development but ensure it occurs in a responsible manner.

What else should be considered while developing a Conservation Strategy?

34 responses

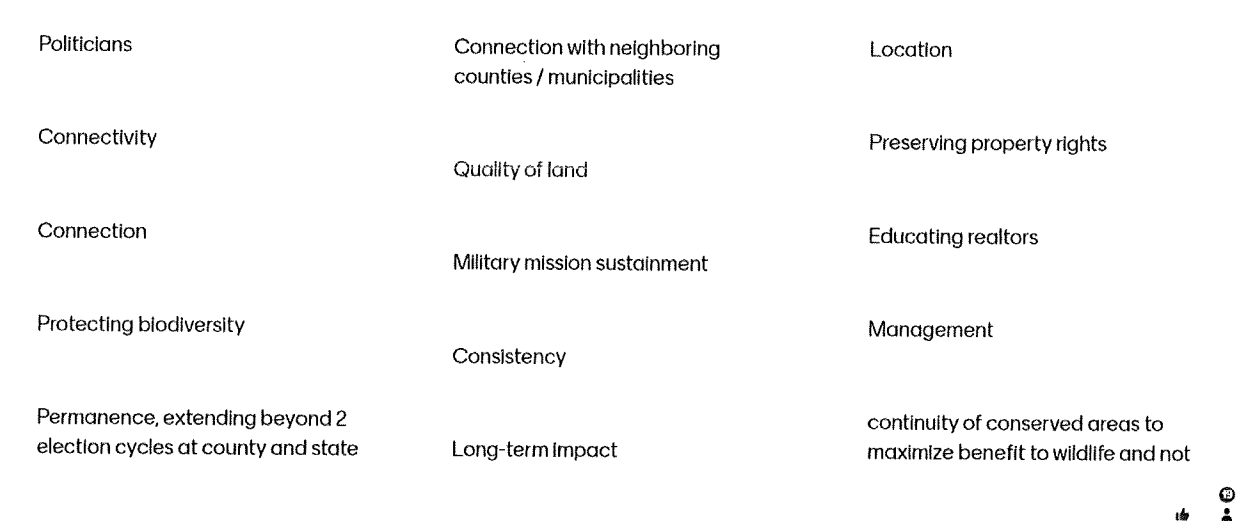


Figure 3. Results from Mentimeter.