

Eagle Pointe Community Development District

Board of Supervisors' Meeting September 14, 2023

District Office: 2700 S. Falkenburg Road, Suite 2745 Riverview, FL 33578

www.eaglepointecdd.org

Professionals in Community Management

EAGLE POINTE COMMUNITY DEVELOPMENT DISTRICT AGENDA

Board of Supervisors	Candice Bain Vacant Vacant Paul Martin Roger Aman	Chairman Vice Chairman Assistant Secretary Assistant Secretary Assistant Secretary Assistant
District Manager	Matt O'Nolan	Rizzetta & Company, Inc.
District Counsel	Jere Earlywine	Kutak Rock Law Group
District Engineer	Trent Stephenson	LevelUp Consulting

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

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

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

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

EAGLE POINTE COMMUNITY DEVELOPMENT DISTRICT DISTRICT OFFICE • 2700 S. FALKENBURG ROAD, SUITE 2700 • RIVERVIEW, FLORIDA 33578 WWW.EAGLEPOINTECDD.ORG

September 6, 2023

Board of Supervisors Eagle Pointe Community Development District

AGENDA

Dear Board Members:

The regular meeting of the Board of Supervisors of Eagle Pointe Community Development District will be held on **Thursday**, **September 14**, **2023 at 9:00 a.m.** at the Eagle Pointe Clubhouse, located at 11450 Moonsail Drive, Parrish, FL 34219. The following is the tentative agenda for this meeting:

1. CALL TO ORDER/ROLL CALL

2. AUDIENCE COMMENTS

3. BUSINESS ITEMS

4. ADJOURNMENT

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

Very truly yours,

Matt O'Nolan

Matt O'Nolan, District Manager Tab 1

RESOLUTION 2023-09

[RESTATED¹ FY 2024 APPROPRIATION RESOLUTION]

THE RESTATED ANNUAL APPROPRIATION RESOLUTION OF THE EAGLE POINTE COMMUNITY DEVELOPMENT DISTRICT ("DISTRICT") RELATING TO THE ANNUAL APPROPRIATIONS AND ADOPTING THE BUDGET FOR THE FISCAL YEAR BEGINNING OCTOBER 1, 2023, AND ENDING SEPTEMBER 30, 2024; AUTHORIZING BUDGET AMENDMENTS; ADDRESSING CONFLICTS; AND PROVIDING AN EFFECTIVE DATE.

WHEREAS, the District Manager has, prior to the fifteenth (15th) day in June, 2023, submitted to the Board of Supervisors ("Board") of the Eagle Pointe Community Development District ("District") proposed budget ("Proposed Budget") for the fiscal year beginning October 1, 2023 and ending September 30, 2024 ("Fiscal Year 2023/2024") along with an explanatory and complete financial plan for each fund of the District, pursuant to the provisions of Section 190.008(2)(a), *Florida Statutes*; and

WHEREAS, at least sixty (60) days prior to the adoption of the Proposed Budget, the District filed a copy of the Proposed Budget with the local governing authorities having jurisdiction over the area included in the District pursuant to the provisions of Section 190.008(2)(b), *Florida Statutes*; and

WHEREAS, the Board set a public hearing thereon and caused notice of such public hearing to be given by publication pursuant to Section 190.008(2)(a), *Florida Statutes*; and

WHEREAS, the District Manager posted the Proposed Budget on the District's website at least two days before the public hearing; and

WHEREAS, Section 190.008(2)(a), *Florida Statutes*, requires that, prior to October 1st of each year, the Board, by passage of the Annual Appropriation Resolution, shall adopt a budget for the ensuing fiscal year and appropriate such sums of money as the Board deems necessary to defray all expenditures of the District during the ensuing fiscal year; and

WHEREAS, the District Manager has prepared a Proposed Budget, whereby the budget shall project the cash receipts and disbursements anticipated during a given time period, including reserves for contingencies for emergency or other unanticipated expenditures during the fiscal year.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE EAGLE POINTE COMMUNITY DEVELOPMENT DISTRICT:

SECTION 1. BUDGET

a. The Board has reviewed the Proposed Budget, a copy of which is on file with the office of the District Manager and at the District's Local Records Office, and hereby approves certain amendments thereto, as shown in Section 2 below.

¹ This Resolution supersedes and replaces Resolution 2023-05. By way of explanation, the District originally held its annual budget and assessment hearings on August 3, 2023. In an abundance of caution, and to ensure that proper notice was provided, the District subsequently held an additional meeting and hearings, as described herein, and in order to revisit the District's annual budget and assessments for Fiscal Year 2024.

- b. The Proposed Budget, attached hereto as **Exhibit "A,"** as amended by the Board, is hereby adopted in accordance with the provisions of Section 190.008(2)(a), *Florida Statutes* (**"Adopted Budget"**), and incorporated herein by reference; provided, however, that the comparative figures contained in the Adopted Budget may be subsequently revised as deemed necessary by the District Manager to reflect actual revenues and expenditures.
- c. The Adopted Budget, as amended, shall be maintained in the office of the District Manager and at the District's Local Records Office and identified as "The Budget for the Eagle Pointe Community Development District for the Fiscal Year Ending September 30, 2024."
- d. The Adopted Budget shall be posted by the District Manager on the District's official website within thirty (30) days after adoption, and shall remain on the website for at least 2 years.

SECTION 2. APPROPRIATIONS

There is hereby appropriated out of the revenues of the District, for Fiscal Year 2023/2024, the sums set forth in **Exhibit A** to be raised by the levy of assessments, a funding agreement and/or otherwise. Such sums are deemed by the Board to be necessary to defray all expenditures of the District during said budget year, and are to be divided and appropriated in the amounts set forth in **Exhibit A**.

SECTION 3. BUDGET AMENDMENTS

Pursuant to Section 189.016, *Florida Statutes*, the District at any time within Fiscal Year 2023/2024 or within 60 days following the end of the Fiscal Year 2023/2024 may amend its Adopted Budget for that fiscal year as follows:

- a. A line-item appropriation for expenditures within a fund may be decreased or increased by motion of the Board recorded in the minutes, and approving the expenditure, if the total appropriations of the fund do not increase.
- b. The District Manager or Treasurer may approve an expenditure that would increase or decrease a line-item appropriation for expenditures within a fund if the total appropriations of the fund do not increase and if either (i) the aggregate change in the original appropriation item does not exceed the greater of \$15,000 or 15% of the original appropriation, or (ii) such expenditure is authorized by separate disbursement or spending resolution.
- c. Any other budget amendments shall be adopted by resolution and consistent with Florida law.

The District Manager or Treasurer must ensure that any amendments to the budget under paragraph c. above are posted on the District's website within 5 days after adoption and remain on the website for at least 2 years.

SECTION 4. CONFLICTS. This Resolution supersedes and replaces Resolution 2023-05. All other District resolutions or parts thereof in actual conflict with this Resolution are, to the extent of such conflict, superseded and repealed.

SECTION 5. EFFECTIVE DATE. This Resolution shall take effect immediately upon adoption.

[CONTINUED ON NEXT PAGE]

PASSED AND ADOPTED THIS 14th DAY OF SEPTEMBER, 2023.

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EAGLE POINTE COMMUNITY DEVELOPMENT DISTRICT

Ву:	Ву:
Title:	Its:

Exhibit A: Fiscal Year 2023/2024 Budget



Eagle Pointe Community Development District

EaglePointeCDD.org

Revised Proposed Budget for Fiscal Year 2023-2024

Professionals in Community Management

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Proposed Budget Eagle Pointe Community Development District General Fund Fiscal Year 2023/2024

	Fiscal Year 2023/2024								
	Chart of Accounts Classification	Actual YTD through 04/30/23	Projected Annual Totals 2022/2023	Annual Budget for 2022/2023	Projecte Budge variance 2022/202	Budget fe or 2023/202	4 (C	Budget Increase Decrease) vs 2022/2023	Comments
1 2	REVENUES								
2	REVENUES								
4	Special Assessments								
5 6	Tax Roll Off Roll*	\$ 268,956 \$ 46,800	\$ 268,957 \$ 46,800		\$ - \$ (46,8	\$ 625,06 00) \$ -	9 \$ \$		
7	Investment Income	φ 40,000	φ 40,000	џ –	φ (40,0	- φ	Ű	-	
B	Interest Earnings	\$ 16	\$ 27	\$-	\$ (27)\$-	\$	-	
9 0	Contributions & Donations from Private Sources Developer Contributions	\$ -	\$-	\$ 211,452	\$ 211,4	52 \$ -	s	(211,452)	
1		Ŷ	Ŷ	\$ 211,102			Ŭ	(211,102)	
2	TOTAL REVENUES	\$ 315,772	\$ 315,784	\$ 480,409	\$ 164,6	25 \$ 625,06	9 \$	144,660	
5 6	TOTAL REVENUES AND BALANCE FORWARD	\$ 315,772	\$ 315,784	\$ 480,409	\$ 164,6	25 \$ 625,06	9 \$	144,660	
7		•••••	+,	•,	• ••••			,	
8 9	EXPENDITURES - ADMINISTRATIVE					-			
9	Legislative								
1	Supervisor Fees	\$ 400	\$ 686	\$ 800	\$ 1	4 \$ 3,80	0 \$	3,000	
2	Financial & Administrative Administrative Services	¢ 0.705	¢ 4.774	A 774	¢	¢ 5.04	0 0	000	
4	District Management	\$ 2,785 \$ 12,438	\$ 4,774 \$ 21,322	\$ 4,774 \$ 21,322	\$ - \$ -	\$ 5,01 \$ 22,38			contract price
5	District Engineer	\$ 2,023	\$ 3,468	\$ 8,000	\$ 4,5	32 \$ 8,00	0\$	-	
5	Disclosure Report Trustee Fees	\$ 5,000 \$ 2.813			\$ - \$ -	\$ 5,00 \$ 3,50			contract price
3	Assessment Roll	\$ 2,813 \$ 5,304	\$ 3,500 \$ 5,304	\$ 3,500 \$ 5,304	\$ -				contract price
)	Financial & Revenue Collections	\$ 2,227	\$ 3,819	\$ 3,819	\$ -	\$ 4,01	0 \$	191	contract price
)	Accounting Services	\$ 11,139	\$ 19,094		\$ -	\$ 20,04			
1 2	Auditing Services Arbitrage Rebate Calculation	\$ 2,500 \$ 900	\$ 2,500 \$ 900	\$ 3,125 \$ 500	\$6 \$-	25 \$ 4,10 \$ 90			contract price
3	Public Officials Liability Insurance	\$ 2,540	\$ 2,540	\$ 2,836	\$ 2	96 \$ 2,79	4 \$		23-24 EGIS proposal
4	Legal Advertising	\$ 879	\$ 1,507			93 \$ 2,00		-	
5 6	Dues, Licenses & Fees Website Hosting, Maintenance, and Email	\$ 774 \$ 1,853	\$ 1,327 \$ 2,738		\$ (3 \$ -	27) \$ 1,55 \$ 2,73			movie licensing fee contract price
7	Legal Counsel				-				
8	District Counsel	\$ 8,143	\$ 13,959	\$ 15,000	\$ 1,0	1 \$ 15,00	0 \$	-	
9 0	Administrative Subtotal	\$ 61,718	\$ 92,438	\$ 98,812	\$ 6,7	4 \$ 106,41	0 6	7,598	
1		φ 01,/10	ψ 32,400	φ 30,012	φ 0,1	φ 100,41	Ť	1,000	
2	EXPENDITURES - FIELD OPERATIONS								
3 4	Electric Utility Services						_		
5	Utility Services	\$ 8,204	\$ 14,064	\$ 36,000	\$ 21,9	86 \$ 40,00	0 \$	4,000	
6	Streetlighting	\$ 18,090	\$ 31,011	\$ 19,500	\$ (11,5	1) \$ 35,00	0 \$	15,500	\$25/pole x 65 poles per month
7	Water Utility Services Utility Services	\$ 6,141	\$ 10,527	\$ 3,000	\$ (7,5	27) \$ 15,00	0 \$	12,000	
8 9	Stormwater Control	φ 0,141	\$ 10,527	\$ 3,000	φ (7,5	27) \$ 15,00	0 3	12,000	
0	Aquatic Maintenance	\$ 10,125	\$ 17,357		\$ (1,7				lakes phases 1-3
1	Wetland Monitoring & Maintenance Midge Fly Treatments	\$ 20,745	\$ 35,563	\$ 12,690	\$ (22,8				phase 1-3
3	Fountain Maintenance	\$ - \$ -	\$ - \$ -	\$ - \$ -	\$ - \$ -	\$ 30,00 \$ 3,00			need to add, lots of midge fly issues entrance fountains
4	Other Physical Environment								
5	General Liability Insurance	\$ 3,105	\$ 3,105	\$ 3,466		51 \$ 3,41			23-24 EGIS proposal
6 7	Property Insurance Landscape Maintenance	\$ 20,809 \$ 64,617	\$ 20,809 \$ 110,772	\$ 341 \$ 86,000	\$ (20,4 \$ (24,7				23-24 EGIS proposal Juniper contract minus amenity breakout (i
8	Irrigation Repairs	\$ 722	\$ 1,238		\$ 3,7				
9	Landscape Inspection Services	\$ -	\$ -	\$ -	\$-	\$ 8,40			contract price
0	Holiday Lights and Décor Landscape Lighting Maintenance	\$ - \$ -	\$ - \$ -	\$ 1,500 \$ 1,000	\$ 1,5 \$ 1,0				
2	Parks and Recreation	-	-	2 1,000	÷ 1,0				
3	Pool Service Contract	\$ 2,200	\$ 3,771	\$ 16,800	\$ 13,0				contract price
4 5	Pool Repairs Pool Permit	\$ - \$ -	\$ - \$ -	\$ 2,000 \$ 375	\$ 2,0 \$ 3	00 \$ 2,00 75 \$ 37			
6	Pool Furniture Replacement	\$ 8,732	\$ - \$ 14,969	\$ 3/5 \$ -	\$ (14,9				
7	Maintenance & Repairs	\$-	\$ -	\$ 16,200	\$ 16,2	00 \$ 15,00	0\$	(1,200)	
8 9	Amenity Management Contract Access Control Maintenance	\$ 19,298 \$ 1,333				18 \$ 46,29 15 \$ 5,00			contract budget
9 0	Access Control Maintenance Amenity Landscape and Irrigation	\$ 1,333	\$ 2,285	\$ 39,600	\$ 39,6				budget price
1	Clubhouse Office Supplies	\$ -	\$ -	\$ 7,500	\$ 7,5	00 \$ 5,00	0\$	(2,500)	
2	Janitorial Service Janitorial Supplies	\$ 6,379 \$ 427	\$ 10,935 \$ 732	\$ 7,380 \$ 1,000	\$ (3,5				contract price + potential extra clean ups
3 4	Security System and Cameras	\$ 427 \$ -	\$ 732 \$ -	\$ 1,000 \$ 11,000	\$ 2 \$ 11,0	68 \$ 5,00 00 \$ 6,00			includes paper products for bathrooms service plan +repairs/additions
5	Mileage Reimbursement	\$ -	\$-	\$ 350	\$ 3	50 \$ 35	0\$	-	
6 7	Telephone, Internet, Cable Playground Maintenance	\$ 533 ¢	\$ 914 ¢	\$ - \$ 3,500		14) \$ 2,50 00 \$ 3.50			
/ B	Misc. Recreation	\$ - \$ -	\$ - \$ -	\$ 3,500 \$ 1,000	\$ 3,5 \$ 1,0		0 \$		included in maintenance and repairs
Э	Staff Uniforms	\$ -	\$-	\$ 500	\$ 5	00 \$ -	\$	(500)	
0	Pest Control Termite Bond	\$ 275	\$ 471	\$ 1,500	\$ 1,0				contract price
2	Fire Extinguishers	\$ - \$ -	\$ - \$ -	\$ 750 \$ 750		50 \$ 75 50 \$ 75			
	Misc. Maintenance	\$ 3,725	\$ 6,386	\$ 9,895	\$ 3,5)9 \$ -	\$	(9,895)	included in maintenance and repairs
3	Computer Support, Maintenance & Repairs	\$ 1,086	\$ 1,862	\$ 1,000	\$ (8	62) \$ 1,50	0 \$	500	
4			\$ 4,342	\$ 11,000	\$ 6,6	58 \$ 8,00	0 \$	(3,000)	
4 5	Special Events	\$ 2533		÷ .1,000	÷ 0,0	φ 0,00		(0,000)	
4 5 6	Special Events Special Events Contingency	\$ 2,533					0 0		
4 5 7 8	Special Events Special Events Contingency Misc. Contingency	\$ -	\$ -	ş -	\$ -	\$ 2,00		2,000	
84 85 86 87 88 89	Special Events Special Events Contingency			\$ - \$ -	\$- \$-	\$ 2,00 \$ 3,50			
4 5 6 7 8 9 0 1	Special Events Special Events Contingency Misc. Contingency Reserve Study Field Operations Subtotal	\$ - \$ - \$ 199,079	\$ - \$ - \$ 324,197	\$ - \$ 381,597	\$ - \$ 57,4	\$ 3,50	0 \$ 9 \$	3,500 137,062	
33 34 35 36 37 38 39 90 91 92 93 94	Special Events Special Events Contingency Misc. Contingency Reserve Study	\$ - \$ -	\$ - \$ - \$ 324,197	\$ -	\$ -	\$ 3,50	0 \$ 9 \$	3,500	

Eagle Pointe Community Development District Debt Service Fiscal Year 2023/2024

Chart of Accounts Classification	Series 2020	Budget for 2023/2024
REVENUES		
Special Assessments		
Net Special Assessments ⁽¹⁾	\$456,026.09	\$456,026.09
TOTAL REVENUES	\$456,026.09	\$456,026.09
EXPENDITURES		
Administrative		
Debt Service Obligation	\$456,026.09	\$456,026.09
Administrative Subtotal	\$456,026.09	\$456,026.09
TOTAL EXPENDITURES	\$456,026.09	\$456,026.09
EXCESS OF REVENUES OVER EXPENDITURES	\$0.00	\$0.00

Manatee County Collection Costs (3%) and Early Payment Discounts (4%):

Gross assessments:

Notes:

Tax Roll Collection Costs (3%) and Early Payment Discounts (4%) are a total 7.0% of Tax Roll. Budgeted net of tax roll assessments. See Assessment Table.

⁽¹⁾ Maximum Annual Debt Service less Prepaid Assessments received.

\$490,350.63

7.0%

EAGLE POINTE COMMUN	ITY DEVELOPMEN	IT DISTRICT		
FISCAL YEAR 2023/2024 O&M AND D	DEBT SERVICE ASS	SESSMENT SCHEDULE		
2023/2024 O&M Budget		\$625,069.00		
Collection Cost @	3%	\$20,163.52		
Early Payment Discount @	4%	\$26,884.69		
2023/2024 Total:		\$672,117.20	-	
2022/2023 O&M Budget		\$268,957.00		
2023/2024 O&M Budget		\$625,069.00		
Total Difference:		\$356,112.00	-	
			=	
_	PER UNIT ANNU	JAL ASSESSMENT	Proposed Increa	ise / Decrease
	2022/2023	2023/2024	\$	%
Series 2020 Debt Service - Single Family 40'	\$1,048.39	\$1,048.39	\$0.00	0.00%
Operations/Maintenance - Single Family 40'	\$1,200.00	\$1,697.27	\$497.27	41.44%
Total	\$2,248.39	\$2,745.66	\$497.27	22.12%
	#1 000 00	#1 000 00	* 0.00	0.00%
Series 2020 Debt Service - Single Family 50'	\$1,268.82 \$1,200.00	\$1,268.82	\$0.00	0.00%
Operations/Maintenance - Single Family 50' Total	\$1,200.00 \$2,468.82	\$1,697.27 \$2,966.09	\$497.27 \$497.27	<u>41.44%</u> 20.14%
	\$2,400.02	ş2,900.09	\$457.27	20.14/0
Series 2020 Debt Service - Single Family 60'	\$1,505.38	\$1,505.38	\$0.00	0.00%
Operations/Maintenance - Single Family 60'	\$1,200.00	\$1,697.27	\$497.27	41.44%
Total	\$2,705.38	\$3,202.65	\$497.27	18.38%
Series 2020 Debt Service - Single Family 40' (Previously Unplatted)	\$1,048.39	\$1,048.39	\$0.00	0.00%
Operations/Maintenance - Single Family 40' (Previously Unplatted) (1)	\$0.00	\$1,697.27	\$1,697.27	0.00%
Total	\$1,048.39	\$2,745.66	\$1,697.27	161.89%
Series 2020 Debt Service - Single Family 50' (Previously Unplatted)	\$1,268.82	\$1,268.82	\$0.00	0.00%
Operations/Maintenance - Single Family 50' (Previously Unplatted) ⁽¹⁾	\$0.00	\$1,697.27	\$1,697.27	0.00%
Total	\$1,268.82	\$2,966.09	\$1,697.27	133.77%
Series 2020 Debt Service - Single Family 60' (Previously Unplatted)	\$1,505.38	\$1,505.38	\$0.00	0.00%
Operations/Maintenance - Single Family 60' (Previously Unplatted) ⁽¹⁾	\$0.00	\$1,697.27	\$1,697.27	0.00%
Total	\$1,505.38	\$3,202.65	\$1,697.27	112.75%
1 4 441	ψ1,000.00	ψ 0,202.00	ψ1,031.21	112.10/0

⁽¹⁾ Operations & Maintenance assessments for the unplatted lots were developer funded for FY 2022-2023. Assessments were levied once sold to an end user

EAGLE POINTE COMMUNITY DEVELOPMENT DISTRICT

FISCAL YEAR 2023/2024 O&M AND DEBT SERVICE ASSESSMENT SCHEDULE

TOTAL O&M BUDGET		\$625,069.00
COLLECTION COST @	3%	\$20,163.52
EARLY PAYMENT DISCOUNT @	4%	\$26,884.69
TOTAL O&M ASSESSMENT		\$672,117.20

	UNITS	UNITS ASSESSED		ALLOCATION OF O&M ASSESSMENT				UNIT ASSESSM	ENTS
		SERIES 2020		TOTAL	% TOTAL	TOTAL		2020 DEBT	
LOT SIZE	<u>0&M</u>	DEBT SERVICE ⁽¹⁾	EAU FACTOR	EAU's	EAU's	O&M BUDGET	<u>0&M</u>	SERVICE ⁽²⁾	TOTAL ⁽³⁾
Single Family 40'	115	115	1.00	115.00	29.04%	\$195,185.55	\$1,697.27	\$1,048.39	\$2,745.66
Single Family 50'	225	225	1.00	225.00	56.82%	\$381,884.78	\$1,697.27	\$1,268.82	\$2,966.09
Single Family 60'	56	56	1.00	56.00	14.14%	\$95,046.88	\$1,697.27	\$1,505.38	\$3,202.65
Totals	396	396	-	396.00	100.00%	\$672,117.20			
	.		<u>1</u>				P		

LESS: Manatee County Collection Costs (3%) and Early Payment Discounts (4%):

Net Revenue to be Collected:

⁽¹⁾ Reflects the number of total lots with Series 2020 debt outstanding.

(2) Annual debt service assessment per lot adopted in connection with the Series 2020 bond issue. Annual assessment includes principal, interest, Manatee County collection costs and early payment discounts.

(3) Annual assessment that will appear on November 2023 Manatee County property tax bill. Amount shown includes all applicable collection costs and early payment discounts (up to 4% if paid early).

(\$47,048.20) \$625,069.00

GENERAL FUND BUDGET ACCOUNT CATEGORY DESCRIPTION

The General Fund Budget Account Category Descriptions are subject to change at any time depending on its application to the District. Please note, not all General Fund Budget Account Category Descriptions are applicable to the District indicated above. Uses of the descriptions contained herein are intended for general reference.

REVENUES:

Interest Earnings: The District may earn interest on its monies in the various operating accounts.

Tax Roll: The District levies Non-Ad Valorem Special Assessments on all of the assessable property within the District to pay for operating expenditures incurred during the Fiscal Year. The assessments may be collected in two ways. The first is by placing them on the County's Tax Roll, to be collected with the County's Annual Property Tax Billing. This method is only available to land properly platted within the time limits prescribed by the County. The second way is by Off Roll collection.

Off Roll: For lands not on the tax roll and that is by way of a direct bill from the District to the appropriate property owner.

Developer Contributions: The District may enter into a funding agreement and receive certain prescribed dollars from the Developer to off-set expenditures of the District.

Event Rental: The District may receive monies for event rentals for such things as weddings, birthday parties, etc.

Miscellaneous Revenues: The District may receive monies for the sale or provision of electronic access cards, entry decals etc.

Facilities Rentals: The District may receive monies for the rental of certain facilities by outside sources, for such items as office space, snack bar/restaurants etc.

EXPENDITURES – ADMINISTRATIVE:

Supervisor Fees: The District may compensate its supervisors within the appropriate statutory limits of \$200.00 maximum per meeting within an annual cap of \$4,800.00 per supervisor.

Administrative Services: The District will incur expenditures for the day to today operation of District matters. These services include support for the District Management function, recording and preparation of meeting minutes, records retention and maintenance in accordance with Chapter 119, Florida Statutes, and the District's adopted Rules of Procedure, preparation and delivery of agenda, overnight deliveries, facsimiles and phone calls.

District Management: The District as required by statute, will contract with a firm to provide for management and administration of the District's day to day needs. These services include the conducting of board meetings, workshops, overall administration of District functions, all required state and local filings, preparation of annual budget, purchasing, risk management, preparing various resolutions and all other secretarial duties requested by the District throughout the year is also reflected in this amount.

District Engineer: The District's engineer provides general engineering services to the District. Among these services are attendance at and preparation for monthly board meetings, review of construction invoices and all other engineering services requested by the district throughout the year.

Disclosure Report: The District is required to file quarterly and annual disclosure reports, as required in the District's Master Trust Indenture, with the specified repositories. This is contracted out to a third party in compliance with the Trust Indenture.

Trustee's Fees: The District will incur annual trustee's fees upon the issuance of bonds for the oversight of the various accounts relating to the bond issues.

Assessment Roll: The District will contract with a firm to maintain the assessment roll and annually levy a Non-Ad Valorem assessment for operating and debt service expenses.

Financial & Revenue Collections: Services include all functions necessary for the timely billing and collection and reporting of District assessments in order to ensure adequate funds to meet the District's debt service and operations and maintenance obligations. These services include, but are not limited to, assessment roll preparation and certification, direct billings and funding request processing as well as responding to property owner questions regarding District assessments. This line item also includes the fees incurred for a Collection Agent to collect the funds for the principal and interest payment for its short-term bond issues and any other bond related collection needs. These funds are collected as prescribed in the Trust Indenture. The Collection Agent also provides for the release of liens on property after the full collection of bond debt levied on particular properties.

Accounting Services: Services include the preparation and delivery of the District's financial statements in accordance with Governmental Accounting Standards, accounts payable and accounts receivable functions, asset tracking, investment tracking, capital program administration and requisition processing, filing of annual reports required by the State of Florida and monitoring of trust account activity.

Auditing Services: The District is required annually to conduct an audit of its financial records by an Independent Certified Public Accounting firm, once it reaches certain revenue and expenditure levels, or has issued bonds and incurred debt.

Arbitrage Rebate Calculation: The District is required to calculate the interest earned from bond proceeds each year pursuant to the Internal Revenue Code of 1986. The Rebate Analyst is required to verify that the District has not received earnings higher than the yield of the bonds.

Travel: Each Board Supervisor and the District Staff are entitled to reimbursement for travel expenses per Florida Statutes 190.006(8).

Public Officials Liability Insurance: The District will incur expenditures for public officials' liability insurance for the Board and Staff.

Legal Advertising: The District will incur expenditures related to legal advertising. The items for which the District will advertise include, but are not limited to meeting schedules, special meeting notices, and public hearings, bidding etc. for the District based on statutory guidelines

Bank Fees: The District will incur bank service charges during the year.

Dues, Licenses & Fees: The District is required to pay an annual fee to the Department of Economic Opportunity, along with other items which may require licenses or permits, etc.

Miscellaneous Fees: The District could incur miscellaneous fees throughout the year, which may not fit into any standard categories.

Website Hosting, Maintenance and Email: The District may incur fees as they relate to the development and ongoing maintenance of its own website along with possible email services if requested.

District Counsel: The District's legal counsel provides general legal services to the District. Among these services are attendance at and preparation for monthly board meetings, review of operating and maintenance contracts and all other legal services requested by the district throughout the year.

EXPENDITURES - FIELD OPERATIONS:

Deputy Services: The District may wish to contract with the local police agency to provide security for the District.

Security Services and Patrols: The District may wish to contract with a private company to provide security for the District.

Electric Utility Services: The District will incur electric utility expenditures for general purposes such as irrigation timers, lift station pumps, fountains, etc.

Streetlights: The District may have expenditures relating to streetlights throughout the community. These may be restricted to main arterial roads or in some cases to all streetlights within the District's boundaries.

Utility - Recreation Facility: The District may budget separately for its recreation and or amenity electric separately.

Gas Utility Services: The District may incur gas utility expenditures related to district operations at its facilities such as pool heat etc.

Garbage - Recreation Facility: The District will incur expenditures related to the removal of garbage and solid waste.

Solid Waste Assessment Fee: The District may have an assessment levied by another local government for solid waste, etc.

Water-Sewer Utility Services: The District will incur water/sewer utility expenditures related to district operations.

Utility - Reclaimed: The District may incur expenses related to the use of reclaimed water for irrigation.

Aquatic Maintenance: Expenses related to the care and maintenance of the lakes and ponds for the control of nuisance plant and algae species.

Fountain Service Repairs & Maintenance: The District may incur expenses related to maintaining the fountains within throughout the Parks & Recreational areas

Lake/Pond Bank Maintenance: The District may incur expenditures to maintain lake banks, etc. for the ponds and lakes within the District's boundaries, along with planting of beneficial aquatic plants, stocking of fish, mowing and landscaping of the banks as the District determines necessary.

Wetland Monitoring & Maintenance: The District may be required to provide for certain types of monitoring and maintenance activities for various wetlands and waterways by other governmental entities.

Mitigation Area Monitoring & Maintenance: The District may be required to provide for certain types of monitoring and maintenance activities for various mitigation areas by other governmental entities.

Aquatic Plant Replacement: The expenses related to replacing beneficial aquatic plants, which may or may not have been required by other governmental entities.

General Liability Insurance: The District will incur fees to insure items owned by the District for its general liability needs

Property Insurance: The District will incur fees to insure items owned by the District for its property needs

Entry and Walls Maintenance: The District will incur expenditures to maintain the entry monuments and the fencing.

Landscape Maintenance: The District will incur expenditures to maintain the rights-ofway, median strips, recreational facilities including pond banks, entryways, and similar planting areas within the District. These services include but are not limited to monthly landscape maintenance, fertilizer, pesticides, annuals, mulch, and irrigation repairs.

Irrigation Maintenance: The District will incur expenditures related to the maintenance of the irrigation systems.

Irrigation Repairs: The District will incur expenditures related to repairs of the irrigation systems.

Landscape Replacement: Expenditures related to replacement of turf, trees, shrubs etc.

Field Services: The District may contract for field management services to provide landscape maintenance oversight.

Miscellaneous Fees: The District may incur miscellaneous expenses that do not readily fit into defined categories in field operations.

Gate Phone: The District will incur telephone expenses if the District has gates that are to be opened and closed.

Street/Parking Lot Sweeping: The District may incur expenses related to street sweeping for roadways it owns or are owned by another governmental entity, for which it elects to maintain.

Gate Facility Maintenance: Expenses related to the ongoing repairs and maintenance of gates owned by the District if any.

Sidewalk Repair & Maintenance: Expenses related to sidewalks located in the right of way of streets the District may own if any.

Roadway Repair & Maintenance: Expenses related to the repair and maintenance of roadways owned by the District if any.

Employees - Salaries: The District may incur expenses for employees/staff members needed for the recreational facilities such as Clubhouse Staff.

Employees - P/R Taxes: This is the employer's portion of employment taxes such as FICA etc.

Employee - Workers' Comp: Fees related to obtaining workers compensation insurance.

Management Contract: The District may contract with a firm to provide for the oversight of its recreation facilities.

Maintenance & Repair: The District may incur expenses to maintain its recreation facilities.

Facility Supplies: The District may have facilities that required various supplies to operate.

Gate Maintenance & Repairs: Any ongoing gate repairs and maintenance would be included in this line item.

Telephone, Fax, Internet: The District may incur telephone, fax and internet expenses related to the recreational facilities.

Office Supplies: The District may have an office in its facilities which require various office related supplies.

Clubhouse - Facility Janitorial Service: Expenses related to the cleaning of the facility and related supplies.

Pool Service Contract: Expenses related to the maintenance of swimming pools and other water features.

Pool Repairs: Expenses related to the repair of swimming pools and other water features.

Security System Monitoring & Maintenance: The District may wish to install a security system for the clubhouse

Clubhouse Miscellaneous Expense: Expenses which may not fit into a defined category in this section of the budget

Athletic/Park Court/Field Repairs: Expense related to any facilities such as tennis, basketball etc.

Trail/Bike Path Maintenance: Expenses related to various types of trail or pathway systems the District may own, from hard surface to natural surfaces.

Special Events: Expenses related to functions such as holiday events for the public enjoyment

Miscellaneous Fees: Monies collected and allocated for fees that the District could incur throughout the year, which may not fit into any standard categories.

Miscellaneous Contingency: Monies collected and allocated for expenses that the District could incur throughout the year, which may not fit into any standard categories.

Capital Outlay: Monies collected and allocated for various projects as they relate to public improvements.

RESERVE FUND BUDGET ACCOUNT CATEGORY DESCRIPTION

The Reserve Fund Budget Account Category Descriptions are subject to change at any time depending on its application to the District. Please note, not all Reserve Fund Budget Account Category Descriptions are applicable to the District indicated above. Uses of the descriptions contained herein are intended for general reference.

REVENUES:

Tax Roll: The District levies Non-Ad Valorem Special Assessments on all of the assessable property within the District to pay for operating expenditures incurred during the Fiscal Year. The assessments may be collected in two ways. The first is by placing them on the County's Tax Roll, to be collected with the County's Annual Property Tax Billing. This method is only available to land properly platted within the time limits prescribed by the County. The second way is by Off Roll collection.

Off Roll: For lands not on the tax roll and that is by way of a direct bill from the District to the appropriate property owner.

Developer Contributions: The District may enter into a funding agreement and receive certain prescribed dollars from the Developer to off-set expenditures of the District.

Miscellaneous Revenues: The District may receive monies for the sale or provision of electronic access cards, entry decals etc.

EXPENDITURES:

Capital Reserve: Monies collected and allocated for the future repair and replacement of various capital improvements such as club facilities, swimming pools, athletic courts, roads, etc.

Capital Outlay: Monies collected and allocated for various projects as they relate to public improvements.

DEBT SERVICE FUND BUDGET ACCOUNT CATEGORY DESCRIPTION

The Debt Service Fund Budget Account Category Descriptions are subject to change at any time depending on its application to the District. Please note, not all Debt Service Fund Budget Account Category Descriptions are applicable to the District indicated above. Uses of the descriptions contained herein are intended for general reference.

REVENUES:

Special Assessments: The District may levy special assessments to repay the debt incurred by the sale of bonds to raise working capital for certain public improvements. The assessments may be collected in the same fashion as described in the Operations and Maintenance Assessments.

EXPENDITURES – ADMINISTRATIVE:

Bank Fees: The District may incur bank service charges during the year.

Debt Service Obligation: This would be a combination of the principal and interest payment to satisfy the annual repayment of the bond issue debt.

Tab 2

RESOLUTION 2023-10

[RESTATED¹ FY 2024 ASSESSMENT RESOLUTION]

A RESTATED RESOLUTION OF THE BOARD OF SUPERVISORS OF THE EAGLE POINTE COMMUNITY DEVELOPMENT DISTRICT MAKING A DETERMINATION OF BENEFIT AND IMPOSING SPECIAL ASSESSMENTS FOR FISCAL YEAR 2023/2024; PROVIDING FOR THE COLLECTION AND ENFORCEMENT OF SPECIAL ASSESSMENTS, INCLUDING BUT NOT LIMITED TO PENALTIES AND INTEREST THEREON; CERTIFYING AN ASSESSMENT ROLL; PROVIDING FOR AMENDMENTS TO THE ASSESSMENT ROLL; PROVIDING A SEVERABILITY CLAUSE; AND PROVIDING AN EFFECTIVE DATE.

WHEREAS, the Eagle Pointe Community Development District ("District") is a local unit of specialpurpose government established pursuant to Chapter 190, *Florida Statutes*, for the purpose of providing, operating and maintaining infrastructure improvements, facilities and services to the lands within the District; and

WHEREAS, the District has constructed or acquired various infrastructure improvements and provides certain services in accordance with the District's adopted capital improvement plan and Chapter 190, *Florida Statutes*; and

WHEREAS, the Board of Supervisors ("Board") of the District has determined to undertake various operations and maintenance and other activities described in the District's budget ("Adopted Budget") for the fiscal year beginning October 1, 2023 and ending September 30, 2024 ("Fiscal Year 2023/2024"), attached hereto as Exhibit A; and

WHEREAS, Chapter 190, *Florida Statutes*, authorizes the District to fund the Adopted Budget through a funding agreement and/or through the imposition of special assessments on benefitted lands within the District, which special assessments may be collected by direct bill or on the tax roll pursuant to Chapter 197, *Florida Statutes*; and

WHEREAS, in order to fund the District's Adopted Budget, the District's Board now desires to adopt this Resolution setting forth the means by which the District intends to fund its Adopted Budget.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE EAGLE POINTE COMMUNITY DEVELOPMENT DISTRICT:

1. OPERATIONS AND MAINTENANCE ASSESSMENTS.

a. Benefit Findings. The provision of the services, facilities, and operations as described in Exhibit A confers a special and peculiar benefit to the lands within the District, which benefit exceeds or equals the cost of the assessments. The

¹ This Resolution supersedes and replaces Resolution 2023-06. By way of explanation, the District originally held its annual budget and assessment hearings on August 3, 2023. In an abundance of caution, and to ensure that proper notice was provided, the District subsequently held an additional meeting and hearings, as described herein, and in order to revisit the District's annual budget and assessments for Fiscal Year 2024.

allocation of the assessments to the specially benefitted lands is shown in **Exhibits A and B,** and is hereby found to be fair and reasonable.

b. Assessment Imposition. Pursuant to Chapters 190, 197 and/or 170, Florida Statutes, and using the procedures authorized by Florida law for the levy and collection of special assessments, a special assessment for operation and maintenance is hereby imposed and levied on benefitted lands within the District and in accordance with Exhibits A and B. The lien of the special assessments for operations and maintenance imposed and levied by this Resolution shall be effective upon passage of this Resolution.

The Board finds and determines that operations and maintenance assessments shall immediately attach only to sold lots (as set forth in **Exhibits "A" and "B"**), and further that operations and maintenance assessments shall also attach on a pro-rated basis to any lots sold during Fiscal Year 2023/2024 at the time of sale, and as evidenced by an estoppel letter prepared by the District's Manager. All unsold lots owned by the developer do not receive the same level of benefit as sold lots and, accordingly, such lots shall not receive an operations and maintenance assessment for Fiscal Year 2023/2024. Instead, any additional costs of the District's Adopted Budget (above and beyond the operations and maintenance assessment that attaches to sold lots) shall be funded pursuant to a deficit funding agreement to be entered into between the District and the project developer.

c. Maximum Rate. Pursuant to Section 197.3632(4), *Florida Statutes*, the lien amount set forth in **Exhibits "A" and "B"** (plus collection costs and early payment discounts) shall serve as the "maximum rate" authorized by law for operation and maintenance assessments.

2. COLLECTION AND ENFORCEMENT; PENALTIES; INTEREST.

- a. Tax Roll Assessments. If and to the extent indicated in Exhibits A and B, certain of the operations and maintenance special assessments (if any) and/or previously levied debt service special assessments (if any) imposed on the "Tax Roll Property" identified in Exhibit B shall be collected at the same time and in the same manner as County taxes in accordance with Chapter 197 of the *Florida Statutes*. The District's Board finds and determines that such collection method is an efficient method of collection for the Tax Roll Property.
- b. Direct Bill Assessments. If and to the extent indicated in Exhibits A and B, certain operations and maintenance special assessments (if any) and/or previously levied debt service special assessments (if any) imposed on "Direct Collect Property" identified in Exhibit B shall be collected directly by the District in accordance with Florida law, as set forth in Exhibits A and B. The District's Board finds and determines that such collection method is an efficient method of collection for the Direct Collect Property.

i. Operations and maintenance assessments directly collected by the District shall be due and payable on the dates set forth in the invoices prepared by the District Manager, but no earlier than October 1st and no later than September 30th of Fiscal Year 2023/2024.

As noted above, operations and maintenance assessments shall attach to any lots sold during Fiscal Year 2023/2024 at the time of sale, and as evidenced by an estoppel letter prepared by the District's Manager. Any such assessments shall be collected directly by the District in accordance with Florida law, and at the time of sale.

- **ii.** Debt service assessments directly collected by the District are due in full on December 1, 2023; provided, however, that, to the extent permitted by law, the assessments due may be paid in two partial, deferred payments and on dates that are 30 days prior to the District's corresponding debt service payment dates all as set forth in the invoice(s) prepared by the District Manager.
- **iii.** In the event that an assessment payment is not made in accordance with the schedule(s) stated above, the whole assessment - including any remaining partial, deferred payments for the Fiscal Year, shall immediately become due and payable; shall accrue interest, penalties in the amount of one percent (1%) per month, and all costs of collection and enforcement; and shall either be enforced pursuant to a foreclosure action, or, at the District's sole discretion, collected pursuant to the Uniform Method on a future tax bill, which amount may include penalties, interest, and costs of collection and enforcement. Any prejudgment interest on delinquent assessments shall accrue at the rate of any bonds secured by the assessments, or at the statutory prejudgment interest rate, as applicable. In the event an assessment subject to direct collection by the District shall be delinquent, the District Manager and District Counsel, without further authorization by the Board, may initiate foreclosure proceedings pursuant to Chapter 170, Florida Statutes, or other applicable law to collect and enforce the whole assessment, as set forth herein.
- c. **Future Collection Methods.** The decision to collect special assessments by any particular method e.g., on the tax roll or by direct bill does not mean that such method will be used to collect special assessments in future years, and the District reserves the right in its sole discretion to select collection methods in any given year, regardless of past practices.

3. **ASSESSMENT ROLL; AMENDMENTS.** The Assessment Roll, attached to this Resolution as **Exhibit "B,"** is hereby certified for collection. That portion of the Assessment Roll which includes the Tax Roll Property is hereby certified to the County Tax Collector and shall be collected by the County Tax Collector in the same manner and time as County taxes. The proceeds therefrom shall be paid to the District. The District Manager shall keep apprised of all updates made to the County property roll by the

Property Appraiser after the date of this Resolution, and shall amend the Assessment Roll in accordance with any such updates, for such time as authorized by Florida law, to the County property roll.

4. **CONFLICTS.** This Resolution supersedes and replaces Resolution 2023-06. All other District resolutions or parts thereof in actual conflict with this Resolution are, to the extent of such conflict, superseded and repealed.

5. **SEVERABILITY.** The invalidity or unenforceability of any one or more provisions of this Resolution shall not affect the validity or enforceability of the remaining portions of this Resolution, or any part thereof.

6. **EFFECTIVE DATE.** This Resolution shall take effect upon the passage and adoption of this Resolution by the Board.

[CONTINUED ON NEXT PAGE]

PASSED AND ADOPTED this 14th day of September, 2023.

ATTEST:

EAGLE POINTE COMMUNITY DEVELOPMENT DISTRICT

Secretary / Assistant Secretary

Ву:_____

lts:_____

Exhibit A: Budget Exhibit B: Assessm

Exhibit B: Assessment Roll (identifying Tax Roll Property and Direct Collect Property)

Tab 3

James P. Casement, CPA/PFS, CFP[™], CFS, JD 8635 Mercator Court Parrish Florida, 34219 (847)971-3434 jim@casement.net www.casement.net www.casementtaxpreparation.com www.casementfinancial.com

<u>Resume</u>

Work Philosophy

John Calvin Coolidge said it best.

"Nothing in the world can take the place of persistence. Talent will not; nothing is more common than unsuccessful men with talent. Genius will not; unrewarded genius is almost a proverb. Education alone will not; the world is full of educated derelicts. Persistence and determination alone are omnipotent. The slogan "press on" has solved and always will solve the problems of the human race."

I believe that hard work and determination are qualities that will overcome other flaws, we can, if we want to, get it done.

<u>Education</u>

Elgin Community College, Elgin, Illinois Associates Culinary Arts, June 2011, with High Honors

Thomas M. Cooley Law School, Lansing, Michigan Juris Doctor, Litigation, May 2007, Cum Laude

Northern Illinois University, DeKalb, Illinois Bachelor of Science, Accounting, May 1984

College of DuPage, Glen Ellyn, Illinois Associates in Arts, June 1982

Professional Experience

 2021- Present Casement Group LLC, DBA Casement Tax Preparation, President
 2007-Present
 Casement Group P.C. Law office, President

1987- Present	Avantax Investment Securities, Inc., Registered Representative, Financial Planner, successfully implement, design and monitor millions of dollars in assets for individuals, corporation and pension/profit sharing plans.
1993- Present	Avantax Advisory Services, Inc., Investment Advisor
	Casement Financial Services P.C., (formally James P. Casement, CPA,
1986-	Casement & Company, CPA's) President, 09/86 to 09/02. Sold CPA firm,
2003	(September 2002).
2001-	Cosoment Mortgogo Brokers Ing. Vice President manager/lean originator
2010	Casement Mortgage Brokers, Inc., Vice President, manager/loan originator

Professional Licenses

Certified Public Accountant (CPA) 1984 Certified Financial Planner (CFP) 1990 Personal Financial Specialist (PFS) 1992 Certified Funds Specialist (CFS) 1994 Investment Co & Var. Contracts Representative NASD Series 6, 11/13/87 Direct Participation Programs Rep. NASD Series 22, 11/28/88 Uniform Securities Agents Law NASD Series 63, 2/12/92 General Securities Agent Law NASD Series 7 GS, 6/25/93 Insurance Producer State of Illinois ACC/Health 10/31/1990 Insurance Producer State of Illinois VAR Contract 07/23/92 Security Principal License NASD Series 24, 1/19/00 Licensed Private Pilot, 1995 Registered IHSA high school baseball umpire, 2002 Licensed Loan Originator, State of Illinois 2005-2012 Attorney, Licensed in IL 2007, Licensed In FL 2008

Civic/Volunteer

Bloomingdale Chamber of Commerce, President and Board Member, 1993-97 Good Shepherd Lutheran Church, Board Member and Director of Stewardship, 1994-1999 YMCA, Elgin Illinois, volunteer coach, 1994-95 The Center for Epilepsy Education, Board Member and Chairman of Golf Outing, 1998-99 Elgin Classic Little League, Coach, Manager, Board Member and President, 1995-2000 Elgin Continental Little League, Manager, 2003-2005 Tribal Chief, YMCA Indian Guide Program, 1993 William Hathaway

8224 Reefbay Cove Parrish, Florida 34219

I am submitting my interest to be a Director on the Eagle Pointe Community Development District. I moved into the District at the end of March 2023 when I purchased my primary residence in Isles at Bayview within the District. My relevant experience is as follows:

1. Hawks Point Community Development District

Hillsborough County, Florida November 2016 - February 2021

Initially elected to the Hawks Point CDD in November 2016 as part of the first general election and started the position in January 2017. I was an active Director on the CDD and worked with residents of the district as well as both Homeowner Associations that resided within the district. Re-elected in November 2020. I lead an initiative to work with the District Engineer, District Attorney and the two HOAs to identify land, ponds, conservation areas, and or entrance ways that were either incorrectly maintained by the district or were not properly conveyed over to the district. I resigned in February 2021 when I sold my residence and left the district. I understand the various laws, to include Sunshine laws, that lay restrictions on the actions and or communications of CDD Directors.

2. Hawks Point Homeowners Association

Hillsborough County, Florida May 2016 - February 2021

Elected by the homeowners to the Hawks Point Homeowners Association Board of Directors as part of the initial homeowner transition from the builder. I was the Treasurer from May 2016 through March 2017 and then became the President from March 2017 through February 2021. I worked with the homeowners, sister HOA and the CDD to transition the community to the homeowners. I worked to stabilize the budget, and improve the community. I worked with the HOA Attorney to breach the management company and transition to a new management company. I worked with an engineering company to identify and correct a water leak in the street of the HOA owned streets. I resigned from the Board when I sold my residence and moved out of the community.

3. Internal Revenue Service

St. Petersburg, Florida August 2004 to Present

I am a Criminal Investigator for the federal government. My position involves researching, understanding and utilizing laws and criminal procedures to investigate alleged financial crimes against the federal government. I have been assigned to the St. Petersburg post of duty since January 2021 and was previously assigned to the Tampa post of duty since December 2012.

As for education, I have a Masters Degree in Tax Accounting from the University of New Orleans (2004; New Orleans, Louisiana), a Bachelors degree in Accounting from the Cleveland State University (2000; Cleveland, Ohio) and an Associates degree from Valencia Community College (1997; Orlando, Florida).

Ronald Berkowitz

r1berkowitz1@gmail.com

(631)-806-2412

11620 Moonsail Dr, Parrish FL 34219

Eagle Point CDD Rizzetta & Company 2700 S. Falkenburg Rd. Suite 2745 Riverview, FL 33578

Dear Matt O'Nolan

I submit this application to express my interest in the Eagle Point CDD board membership position.

I previously held board roles as the Executive Vice President for the APICS NYC LI Chapter and as a Board Director of a small consulting consortium firm. I was responsible for inputs on missions and strategies, reviewing policy and procedure for governance, developing material to assist the Board, and implementing a benchmarking program. I also shared in responsibilities for developing ideas for increasing fundraising and membership revenue, made sure that all the work is done according to the bylaws and the ethical principles of the organization and held a fiduciary role to set, and monitor budget and financial fiscal plans.

I further reviewed the requirements of this appointed opening and I believe my candidacy is an excellent fit for this position. Some of the key requirements that I have extensive experience from my professional career include the following:

- Reviewed and approved programs and services and approved strategic plan
- Worked with Government agencies, including grant writing and seeking grant opportunities
- Conducted RFPs/RFQs, contract negotiations and supplier relationship management
- Project Manager on several dozens of corporate projects and savings plans
- Monitored and reported on spending and industry trends. Created KPIs to measure against
- Create executive summaries and presentations to communicate to everyone on all levels

Although the most recent experiences in my career have not focused on a board position, it was a major part of my prior responsibilities for several years. I also have been involved with volunteer groups and volunteering roles. While I was a Sr Manager of Procurement Analytics & Reporting, I completed my Master's Certificate from Villanova University in LEAN Six Sigma to become a Black Belt of process improvement. My experience in managing corporate projects, cross functional teams, and along with my business acumen will help ensure that this position runs smoothly and efficiently. Additionally, my ability to work well under pressure and to multitask effectively will enable me to handle the demands of all internal and external functions working together to exceed our goals.

I look forward to discussing my qualifications with you further.

Thank you for your consideration,

Ronald Berkowitz

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	-	-	Data Analytics Sigma Contract
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Ron Berkowitz

(🖾)<u>r1berkowitz1@gmail.com</u> (💿)Greater Tampa Bay Area, FL (im)www.linkedin.com/in/ronaldberkowitz

Professional Overview

(2)631-806-2412

Savings driven Procurement Manager offering 20 years of experience; adept in developing savings plans, supplier relationships, strategic sourcing, and cross functional leadership. Highly analytical and process-oriented data analyst background with in-depth knowledge of database types, data capture, manipulation, and visualization. Project manager with broad knowledge of project methodologies and delivering results on time. LEAN Six Sigma practitioner for improving performance by systematically removing waste and reducing variation. Highly skilled at communicating and building influential relationships with suppliers, clients, and teams at all levels. Managed teams and direct reports but can work in an independent role when the situation requires it.

Work Experience

Nestle Health Science (acquired The Nature's Bounty Co.) **Expert Contract Manufacturing** (Jan 2022 – June 2023)

June 2009-June 2023

Promoted to support departmental strategies and provide guidance to teams with sourcing initiatives. Identified and implemented improvements to the Outsourcing and Contract Manufacturing process to accelerate Supply Chain performance. Served as main point of contact to cross-functional resources across the Supply Chain for compliance on strategies and performance on multiple corporate projects.

- Developed strategic approach to supplier management, contract negotiations and pricing strategies.
- Experience in building business case for outsourcing/insourcing new or existing products utilizing manufacturing and finance data and stakeholder relationships.
- Oversaw business relationships between internal resources and external partners to meet business needs including Quality & Tech Services for ensuring product spec transfers, resource capabilities and commercialization efforts were planned and executed.
- Project lead on Corporate Consolidation Project to reduce number of suppliers based on their capabilities and performance, across seven business units combining into one. Assessed Suppliers for business growth.
- Drove action plans to completion through interim management, project management, direct execution, or execution advisory.
- Served as a resource regarding procurement policies and procedures, sourcing requirements, products and services, and administrative requirements for procurement of goods and services.
- Proactively find opportunities for process improvements in service, productivity, cost, quality, and other areas to streamline and enhance communication.
- Designed presentations for Senior Leadership and presented them to stakeholders.
- Aid stakeholders with acquisition strategies and sourcing & procurement options

Sr Manager Procurement; Analytics and Sourcing (Jun 2009 – Jan 2022)

Over a decade of directly supporting the CPO on numerous initiatives, corporate projects, and tasks. Oversaw both direct and indirect procurement spending and savings plans. Managed and monitored supplier performance, which included initiating and managing ongoing projects to reduce overall procurement costs and improve supplier reliability, delivery, and performance.

- Developed key business reports and implemented best business practices for PPV and Supplier Performance, exposing multi-million dollars in savings opportunities.
- Analyzed current and potential suppliers, as well as develop strategic alliances with suppliers to maintain competitive pricing, flexible lead times and high standards of quality.
- Created savings and spend cube to report to Executive Management and Finance on category spend, trends and savings including dashboards and corrective actions.

Ron Berkowitz

(im) www.linkedin.com/in/ronaldberkowitz

Work Experience Continued

- Partnered in driving the strategy and yearly planning for the procurement department.
- Lead sourcing initiatives: RFPs, Contract PO, Reverse Auctions, Market Buys, Reformulations etc. with project teams and outside consultants to save millions of dollars in price reductions and cost avoidance.
- Develop and conducted the Supplier Diversity Program with Senior Leadership and reporting for Gov't agencies.

(🖂)<u>r1berkowitz1@gmail.com</u> (③)Greater Tampa Bay Area, FL

- Ability to apply advanced analytics and industry benchmarking techniques and tools.
- Introduced numerous software solutions to the Dept. Acted as Project Manager to implement tools and incorporate into team's daily workflow. (Ariba SpendCube, Qlik, Tableau, OracleBI, FairMarkit, PowerBI, Scout, CVM Diversity Spend)
- Ad Hoc reporting and data model analysis for both Direct and Indirect materials with an annual spend of \$1.2B.
- Direct Supervisor of analytics team to report savings and initiate sourcing opportunities with Category Managers.
- Lead, coached and trained team on best practices and hard skills in data analytics.
- Created department dashboard, and other data visualization reporting in conjunction with Finance to report department performance (Weekly, Monthly, Quarterly, Annually).

GREYSTONE BUSINESS SOLUTIONS

Principal Consultant

(3)631-806-2412

Helped take a consortium of consultants and turn it into a company. Took the belief that by combining into one company we could better support our customers by providing a larger portfolio of services and solutions. Worked in all functions of a client's organization helping them increase efficiencies by eliminating wasteful steps, greatly improve performance by analyzing existing processes to develop business plans with strong focus on profitability and quality.

- Dealt with Senior Executives within Clients, usually at Vice President or C-Level
- Generated, as a team, 3x the bookings expectations by current consultant contractor.
- Performed due diligence and financial risk analysis for possible company purchase/merger.
- Ran projects consisting of team members and Client associates and aligned into Client's needs.
- Created and presented multimedia presentations for existing and prospectus clients.
- Oversaw multiple IT projects, demonstrating knowledge of IT fundamentals and the practical application relating to the end user.
- Cooperatively create training curriculums with associates and clients based on need.

TELEBYTE

Manufacturing Operations Director

Successfully steered the company through its newly existing Lean Manufacturing initiative, keeping only its core competencies in-house.

- Decreased production times by over 50% by doing a" 5" S clean up, cellular manufacturing and one (1) piece flow.
- Recommended suppliers to outsource 90% of production items at 80% of std. cost.
- Highly successful in reducing inventory by over 95% of SKUs and 90% of sq ft.
- Supplier reduction from over 100 active vendors to 8 strategic relationships.

EDUCATION

TECH SKILLS

Data Analysis Models Training Programs Contract Negotiations Supplier Management Visual Presentations Project Management ERP Implementation Six Sigma Black Belt

|| Bachelor's Industrial Technology of Management State University of New York

Farmingdale, New York

PROFESSIONAL DEVELOPMENT

|| Master's Certificate Lean Sigma Black Belt Villanova University

<u>ORGANIZATIONS</u>

|| Exec VP Board of Directors APICS, Long Island Chapter 2005 - 2007

ADDITIONAL TENURE

Production Control Manager Uniflex

Long Island, NY Jan 2004 - July 2005

Master Production Scheduler Anorad, Rockwell Automation Long Island, NY June 2000 - Sept 2003

Production Planner Oyster Bay Pump Works Long Island, NY June 1999 - June 2000

SKILLS

Communication Teamwork Problem-solving Time management Accountability Decision-making Empathy Resourcefulness

July 2005 - Sept 2007

Sept 2007 – June 2009



September 5, 2023

Eagle Pointe Community Development District ~ Isles at Bay View attention Matt O'Nolan sent via email: monolan@rizzetta.com

Dear Matt,

I'm writing to express my deep interest in the vacant seat on the Eagle Pointe Community Development District (CDD) Board of Supervisors. My extensive marketing expertise, combined with a strong background in sales and board leadership, uniquely positions me to enhance the success of Eagle Pointe CDD for Isles at Bay View, Parrish, Florida.

In my current role as President and Marketing Director at CC Media Partners, I've led strategic media campaigns while overseeing in-house design, copywriting, and production. I've catered to diverse clients, including regional automotive groups, legal firms, retailers, and healthcare providers, for over two decades.

Prior to this, I excelled during eight years at Cumulus Radio, advancing from an Account Executive to General Sales Manager. I consistently exceeded budget targets, maintaining an average yearly budget of 119%. My early career at The Sun Chronicle honed my advertising and design skills.

In addition to my professional background, I've held board leadership roles, including three terms as President of the Executives Association of Rhode Island and contributions to Rhode Island College's Alumni Association. This demonstrates my commitment to guiding organizations through successful transitions.

In summary, my marketing, sales, and board leadership experience, coupled with a Bachelor of Fine Arts degree from Rhode Island College, make me an ideal candidate for the Eagle Pointe CDD board. I'm eager to bring my expertise to your team.

Enclosed is my resume, providing more details on my qualifications. I'm available for an interview to discuss how my experiences align with your needs. Please contact me at (401) 556-0286 or cathy.corelli@gmail.com.

Thank you for considering my application. I look forward to contributing to Eagle Pointe CDD's continued success.

Sincerely MIANU Cathy Corelli Chianese

address: 11607 Armada Way, Parrish, FL 34219 email: cathy.corelli@gmail.com telephone: (401) 556-0286



Cathy Corelli Chianese

Vojective To obtain a seat

on the Eagle Pointe Community Development District (CDD) Board of Supervisors; Isles at Bay View Communiuty

address:

11607 Armada Way Parrish, FL 34219

email: cathy.corelli@gmail.com

tetephone: (401) 556-0286

Work Experience

CC Media Partners 1997 to Current

765 Westminster St., #206, Providence, RI 02910 President, Marketing Director Strategic media buying and marketing that combines an exceptionally strong core competency offering in-house graphic design, copywriting, and commercial production for TV and radio, including OTT. CC Media has a diverse portfolio with current clients range from regional automotive groups and lawyers, to retail and healthcare.

Cumulus Radio, Providence, RI 1989-1997

General Sales Manager, 1995-1997: Advertising General Sales Manager: managed budgets for the two of the companies radio stations, Fun 107 FM and its AM affiliate. Maintained an average yearly budget of 119%.

Account Executive, 1989-1995: Advertising account executives selling creative ideas for advertising campaigns and acting as a liaison between the radio station and clients.

The Sun Chronicle 1982-1989

Account Executive: Advertising account executives selling creative ideas for advertising campaigns and acting as a liaison between the newspaper and clients.

Freelance Graphic Artist: Hired by the publisher of the newspaper, acting as a freelance graphic artist for special projects for promoting in-house campaigns for the newspaper.

Board Experience

Executives Association of Rhode Island 2010 to present

Board of Director, Past President: currently serving as Past President/Board of Director guiding the current President and Vice President through the transistion of power. President 2020, 2021, 2022: served three consecutive terms as president of the EARI Secretary 2013-2019 EARI Board Member 2010-2012 EARI

Rhode Island College 2012 to 2015

Board of Director, Alumni Association: worked on the marketing strategies for the RIC Alumni Association. Graduating Class 1982, Bachelor of Fine Arts Degree

JMW School of the Performing Arts 2005 to 2010 Pawtucket RI 02860

Marketing: worked on the marketing strategies for the Arts High School

Fruit Hill Condo Association 2006-2012 Providence, RI 02911

President: once the owner turned over the board to the homeowners.presiding over board meetings and facilitating the decision-making process; signing contacts, checks, and other legal documents; serving as a spokesperson for the HOA; and taking charge of the day-to-day operations.

Cedar Crest Condo Association 1985-2003 Greenville, Rhode Island, RI 02828

Vice President: 2002-2003, takes charge in the absence of the HOA President. Secretary: 1985-2001, responsible for keeping the official records of the board and association

Education Rhode Island College Class of 1982

Bachelor of Fine Arts, Minor Art History

Rhode Island School of Design Attended RISD for supplemental classes that applied towards my degree at RIC



Cathy Corelli Chianese, CC Media Partners & Two Cats Design Studio

Introducing Cathy Corelli Chianese: Unleashing the Powerhouse of Creative Advertising!

Cathy Corelli Chianese, known simply as Cathy Corelli, is a name that resonates in the advertising industry. As the President and Marketing - Creative Director of CC Media Partners, she leads every aspect of her clients' advertising campaigns, from ingenious marketing strategies to strategic media buying and the production of captivating print, billboard, and electronic media commercials.

With a strong artistic background, Cathy holds a Bachelor of Arts in Fine Arts from Rhode Island College, where she also minored in Graphic Design and Art History. Her journey began as an Advertising Account Executive at The Sun Chronicle in Massachusetts, before she transitioned to electronic advertising.

Rapidly ascending the ranks, Cathy's expertise expanded across newspaper and electronic media, leading her to establish CC Media Partners in 1997. Today, the agency stands as a powerhouse in the industry, renowned for its comprehensive marketing campaigns, logo and identity designs, and impactful advertising across various mediums.

In 2015, Cathy launched Two Cats Design Studio, a television, radio, and graphic design production company. This addition expanded CC Media Partners' capabilities, offering clients a seamless one-stop-shop experience for their creative needs.

With an exceptional track record spanning over two decades, Cathy Corelli's dedication to long-term client partnerships is a testament to her expertise and commitment. She personally oversees each project, providing her unrivaled expertise, undivided attention, and unwavering support to drive the growth and success of her clients' businesses.

CC Media Partners and Two Cats Design Studio are trusted allies in an era where every advertising dollar counts. The teams' extensive knowledge and limitless resources ensure a commitment to creativity without compromising your bottom line. They seamlessly integrate television, radio, digital, print, billboard, social media, and website development for comprehensive marketing campaigns.

Beyond her professional achievements, Cathy's passion extends to making a positive impact. She actively supports charitable organizations such as Big Cat Rescue, RISPCA, Florida SPCA, and the Southeastern Guide Dogs. Additionally, Corelli is a proud member and past president of the Executives Association of Rhode Island, fostering connections and contributes to the professional community. As a continuation of fostering relationships, Corelli has also served on HOA boards in various officer positions.

When you choose Cathy Corelli, CC Media Partners, and Two Cats Design Studio, you gain a partner who treats your business as if it were their own. With nearly three decades of excellence and long-standing client partnerships, they provide the personal attention, expertise, and unwavering dedication required to turn your dreams into reality. Together, your business will achieve greatness.

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Cathy Corelli Chianese || Office: (401) 437-8318, Cell: (401) 556-0286 business email: cathy.corelli@ccmedia.us || personal email: cathy.corelli@gmail.com

Cathy Corelli Chianese Marketing Director

Marketing and advertising are usually referred to as an art, but there is also a science to it. A career professional with over 20 years of industry expertise, Cathy Corelli Chianese offers a unique and comprehensive approach to advertising and marketing solutions. "We look at the whole picture," says the owner of **CC MEDIA PARTNERS**. "We take the time to get to know each business, and to understand every aspect of it." Committed to producing results for her clients, Cathy and her team manage the marketing of each business with the experience, personality and relentless drive as if it were their own. "In today's fast paced and digital-savvy environment, businesses need more than just creative design and production. They need a partner that fully understands their needs and can develop strategies to reach their goals," she says.

CC Media Partners is a full-service advertising/design agency that helps small and large businesses throughout Rhode Island and Massachusetts with strategic media buying and marketing plans as well as offering full service design and video production. Cathy, along with her marketing assistant and key creative team partner Rose Cantor, has a proven track record of providing personalized creative solutions. "There are no templates in our advertising campaigns," she says, adding that the agency's work is customized for each client and project. "Our focus is always on the client and making their message stand out from their competition; our success is based on their success."

Cathy combines her exceptionally strong experience in graphic design, writing and production for TV and radio with a diverse portfolio of creative services. Her boutique agency provides comprehensive marketing campaigns for all mediums including print, billboard, direct mail, digital, email, and social media. "The key is consistent and compelling





messages that are optimized for each medium and built for engagement," she says. In addition to proficient media buying and executing targeted marketing campaigns, CC Media Partners also develops websites with custom content and design, and produces professional quality video and commercials. Current clients range from regional automotive groups and

• Our focus is always on the client and making their message stand out from their competition; our success is based on their success.

lawyers to retail and healthcare. "We don't specialize in any one industry, although I am passionate about cars which is one of the reasons I tend to gravitate towards automotive dealers. Results driven marketing is our true specialty," she says with a smile.

With over two decades of impressive market knowledge and media connections, Cathy believes in offering real experience to college students pursuing a career in marketing. "Although we do not currently have an intern working with us, Johnson & Wales University and Rhode Island College have been in touch with me regarding internship candidates for the summer." In addition, Cathy represents the local business community as a member and 2020 President of the Executives Association of Rhode Island, and supports a variety of non-profits, including Big Cat Rescue and the RISPCA. "I'm proud of the longstanding partnerships I have with my clients and the community," she says. "I'm honored to know that we've been a part of their success."

> Warwick. 437-8318, CCMediaPartners.com

CATHY CORELLI CHIANESE, *President/Marketing Director & Graphic Designer* **ROSE CANTOR,** *Graphic Designer*



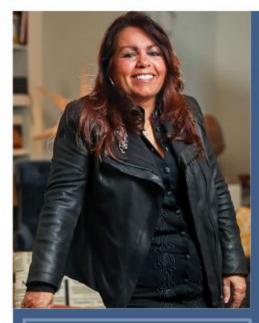
CC Media Partners' focus is always on the client and making client messages stand out from their competition. If you've ever wondered why a tiger is **CC MEDIA PARTNERS** identifiable image, it's simple: No two tigers have the same stripes – they're like human fingerprints, their stripe pattern is unique to each individual tiger, making them identifiable in the wild. Your marketing initiatives will have the same uniqueness as a tiger's stripes.

Marketing and advertising are usually referred to as an art, but there is also a science to it. A career professional with over 25 years of industry expertise, Cathy Corelli offers a unique approach to advertising and marketing businesses throughout Rhode Island and Massachusetts. Cathy uses strategic media buying and marketing that combines an exceptionally strong core competency offering in-house graphic design, copywriting, and commercial production for TV and radio, including OTT. She has a diverse portfolio that includes comprehensive marketing campaigns for all forms of media advertising, including social media, and website development. CC Media provides in-house graphic design, plus TV and radio commercial production.

Current clients range from regional automotive groups and lawyers to retail and healthcare. "We don't specialize in any one industry, although I am passionate about cars, which is one of the reasons I tend to gravitate towards automotive dealers." she says with a smile.

In today's business world, you need a partner to handle marketing your business with the same personality and drive as if it were their own; with more than 25 years of experience and longstanding client partnerships that prove her track record, Cathy and her long-term key creative team partner, Rose Cantor, provide personal attention and expertise, instilling confidence while confirming their dedication to your business. "Our success is based on your success, and we are honored to be a part of it!" Cathy is also a supporter of Big Cat Rescue, RISPCA, and 2021 President of Executives Association of RI.

> 765 Westminster Street, Suite 206, Providence. 437-8318, CCMediaPartners.com



765 Westminster Street, Providence, RI 02903 401-437-8318 cathy.corelli@ccmedia.us ccmediapartners.com

CATHY CORELLI CHIANESE President/Marketing Director CC Media Partners

athy Corelli's focus is always on the client and making their messages stand out from their competition. If you've ever wondered why a tiger is CC Media Partners' identifiable image, it's simple: No two tigers have the same stripes – like human fingerprints, their stripe pattern is unique to each individual tiger, making them identifiable in the wild. Your marketing initiatives will have the same uniqueness as a tiger's stripes.

A career professional with more than twenty-five years of industry expertise, Cathy and her creative team offer a unique approach to advertising and marketing businesses throughout Rhode Island and Massachusetts by utilizing strategic media buying and marketing across traditional and non-traditional media.

In today's business world, you need a partner to handle your business with the same personality and drive as if it were their own. Our team provides personal attention and expertise, instilling confidence while confirming their dedication to your business. Our success is based on your success! Cathy is a supporter of Big Cat Rescue, RISPCA and President of Executives Association of RI.



74 Frenchtown Road North Kingstown, RI, 02852 401-262-0042 rhodeeyeland.com

JACQUELINE BOISVERT, O.D. Owner/Optometrist Rhode Eyeland

HAT ASPECTS OF YOUR BUSINESS ARE YOU MOST PROUD OF? With the help of wonderful staff, I manage a family-oriented optometry practice for patients of all ages. In addition to eye exams, we offer contact lens care, medical visits and emergency services. Extended hours and Saturday appointments offer convenience in a state-of-the-art setting. We proudly offer a beautiful selection of eye wear for all ages and budgets.

What is your favorite part about your job? Do you find any aspect of it to be particularly meaningful? I enjoy getting to know my patients well. One of my favorite reviews states, "That rare combination of skill and personality sets her apart... she is utmost professional, friendly, upbeat." I strive to deliver that degree of care and professionalism every day.

If you had to pin down one reason for your business's success, what would it be? Listening carefully to each patient's individual needs and then providing excellent medical advice and service. We appreciate the opportunity to care for your ocular health.

35 Wilbur Henry Drive, Florence, NJ 08518 🏻 🏫

- (609) 204-5178 🔍
- TomFDoc@gmail.com 🔽
- www.linkedin.com/in/TomFDoc in

Tom Dougherty

SUMMARY

Detail-oriented Analyst with more than 11 years of experience developing partnerships, increasing revenue, and analyzing trending markets. Possesses a proven track record of identifying areas of improvement for business opportunities. A combat veteran and National Guardsmen Officer with excellent communication and organizational skills and a passion for community development.

EDUCATION

Thomas Edison State University

October 2017 – December 2019

Master of Science in Information Technology: Cybersecurity (Critical Infrastructure)

<u> July 2020 – October 2022</u>

Master of Business Administration

<u> January 2023 – August 2025</u>

Doctorate of Business Administration

EXPERIENCE

Clerk of the Circuit Court and Comptroller of Pinellas County, Business Analyst

March 2023 – Current

- Responsible for the project accounting finances of capital improvement projects, grants, and indirect projects for Pinellas County
- Assessed performance metrics for Board Records and develop business intelligence visualizations for their results
- Tabulate and process biweekly payroll to processes for the employees of the Board of County Commissioners

Educating Testing Service, Test Security Analyst

June 2021 – February 2023

- Identified and investigated over 3,500 cases of testing abnormalities and security breaches, including score validity and secure material violations
- Performed forensic and statistical analysis for discrepancies and unusual test response patterns for individual and group cases
- Created a collaborative document for the Office of Testing Integrity which rapidly identifies numerous anomalies of an exam and increased time efficiency

VoiceComm LLC, Sales Strategic Analyst

April 2016 – June 2021

- Qualified, maintained and grew over 500 new account opportunities for over \$750k in sales annually
- Delivered daily quality customer service and product knowledge for business to consumer (B2C) and business to business (B2B)
- Interpret, evaluate and report key performance Indicators (KPIs) to CEO, CFO, and CCO through detailed analytics for over 7000 accounts within customer relationship management (CRM)

ACHIEVEMENTS

SKILLS

- Business Development
- Community Management
- Operations Analytics
- Strategic Marketing
- Customer Service
- Data Analytics

- Distinguished Honor Graduate as a UH-60 Blackhawk Mechanic
- Basic Leadership Course Commandant's List
- 2019 USO Volunteer of Quarter
- Presidential Volunteer Service Award
- MSIT & MBA Summa Cum Laude Graduate