



Rizzetta & Company

Summit View Community Development District

**Board of Supervisors' Meeting
June 18, 2021**

**District Office:
5844 Old Pasco Road, Suite 100
Wesley Chapel, Florida 33544
813.994.1001**

www.watersedgecdd.org

SUMMIT VIEW COMMUNITY DEVELOPMENT DISTRICT AGENDA

At the office of Rizzetta & Company, Inc., located at:
5844 Old Pasco Road, Suite 100, Wesley Chapel, FL 33544

Board of Supervisors	Doug Weiland Natalie Feldman Robert Tankel Pete Williams John Blakely	Chairman Vice Chairman Assistant Secretary Assistant Secretary Assistant Secretary
District Manager	Matthew Huber	Rizzetta & Company, Inc.
District Counsel	Jennifer Kilinski	Hopping Green & Sams
District Engineer	Paul Skidmore	Florida Design Consultants

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) 933-5571. 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.

SUMMIT VIEW COMMUNITY DEVELOPMENT DISTRICT

District Office · Wesley Chapel, Florida · (813) 994-1001
Mailing Address – 3434 Colwell Avenue, Suite 200, Tampa, Florida 33614
www.summitviewcdd.org

June 15, 2021

**Board of Supervisors
Summit View Community
Development District**

REVISED AGENDA

Dear Board Members:

The audit committee meeting and the regular meeting of the Board of Supervisors of the Summit View Community Development District will be held on **Friday, June 18, 2021 at 10:00 a.m.** at the office of Rizzetta & Company, Inc., located at 5844 Old Pasco Road, Suite 100, Wesley Chapel, FL 33544. The following is the revised agenda for the meeting:

AUDIT COMMITTEE MEETING:

1. **CALL TO ORDER/ROLL CALL**
2. **AUDIENCE COMMENTS ON AGENDA ITEMS**
3. **BUSINESS ADMINISTRATION**
 - A. Consideration of Audit Proposals Received for the District's Auditing ServicesTab 1
4. **ADJOURNMENT**

BOARD OF SUPERVISORS' MEETING:

1. **CALL TO ORDER/ROLL CALL**
2. **AUDIENCE COMMENTS ON AGENDA ITEMS**
3. **BUSINESS ADMINISTRATION**
 - A. Consideration of Minutes of the Board of Supervisors' Meeting held on May 21, 2021Tab 2
 - B. Consideration of Minutes of the Audit Committee Meeting held on May 21, 2021Tab 3
 - C. Consideration of Operation and Maintenance Expenditures for May 2021Tab 4
4. **BUSINESS ITEMS**
 - A. Acceptance of Resignation from MBS Capital MarketsTab 5
 - B. Consideration of FMS Bonds Agreement.....Tab 6
 - C. Consideration of Supplemental Engineers ReportTab 7
 - D. Consideration of Methodology Report.....Tab 8

- E. Consideration of Resolution 2021-32, Delegating Bonds.....Tab 9
 - a. Master Trust Indenture (under separate cover)
 - b. First Supplemental Trust Indenture (under separate cover)
 - c. Preliminary Limited Offering Memorandum (under separate cover)
 - d. Bond Purchase Contract (under separate cover)
 - e. Continuing Disclosure Agreement
 - F. Consideration of Issuer Counsel Documents (under separate cover)
 - a. Completion Agreement (under separate cover)
 - b. Collateral Assignment Agreement (under separate cover)
 - c. True Up Agreement (under separate cover)
 - G. Consideration of Ancillary Financing Matters (under separate cover)
- 5. STAFF REPORTS**
- A. District Counsel
 - B. District Engineer
 - C. District Manager
- 6. SUPERVISOR REQUESTS AND AUDIENCE COMMENTS**
- 7. ADJOURNMENT**

We look forward to seeing you at the meeting. In the meantime, if you have any questions, please do not hesitate to call us at (813) 933-5571.

Sincerely,
Matthew Huber
Matthew Huber
Regional District Manager

Tab 1

**SUMMIT VIEW
COMMUNITY DEVELOPMENT DISTRICT
PROPOSAL FOR AUDIT SERVICES**

PROPOSED BY:

Berger, Toombs, Elam, Gaines & Frank
CERTIFIED PUBLIC ACCOUNTANTS, PL

600 Citrus Avenue, Suite 200
Fort Pierce, Florida 34950

(772) 461-6120

CONTACT PERSON:

J. W. Gaines, CPA, Director

DATE OF PROPOSAL:

June 4, 2021

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Berger, Toombs, Elam, Gaines & Frank

Certified Public Accountants PL

600 Citrus Avenue
Suite 200
Fort Pierce, Florida 34950

772/461-6120 // 461-1155
FAX: 772/468-9278

June 4, 2021

Summit View Community Development District
Rizzetta & Company, Inc.
12750 Citrus Park Lane, Suite 115
Tampa, FL 33625

Dear District Manager:

Thank you very much for the opportunity to present our professional credentials to provide audit services for Summit View Community Development District.

Berger, Toombs, Elam, Gaines & Frank, Certified Public Accountants, PL has assembled a team of governmental and nonprofit specialists second to none to serve our clients. Our firm has the necessary qualifications and experience to serve as the independent auditors for Summit View Community Development District. We will provide you with top quality, responsive service.

Experience

Berger, Toombs, Elam, Gaines & Frank, Certified Public Accountants, PL is a recognized leader in providing services to governmental and nonprofit agencies throughout Florida. We have been the independent auditors for a number of local governmental agencies and through our experience in performing their audits, we have been able to increase our audit efficiency and; therefore, reduce costs. We have continually passed this cost savings on to our clients and will continue to do so in the future. As a result of our experience and expertise, we have developed an effective and efficient audit approach designed to meet or exceed the performance specifications in accordance with auditing standards generally accepted in the United States of America, the standards applicable to financial audits contained in Government Auditing Standards, issued by the Comptroller General of the United States, and the standards for financial and compliance audits. We will conduct the audit in accordance with auditing standards generally accepted in the United States of America; "Government Auditing Standards" issued by the Comptroller General of the United States; the provisions of the Single Audit Act, Subpart F of Title 2 US Code of Federal Regulations (CFR) Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards*, with minimal disruption to your operations. Our firm has frequent technical updates to keep our personnel informed and up-to-date on all changes that are occurring within the industry.



Berger, Toombs, Elam,
Gaines & Frank
Certified Public Accountants PL

Summit View Community Development District
June 4, 2021

Our firm is a member of the Government Audit Quality Center, an organization dedicated to improving government audit quality. We also utilize the audit program software of a nationally recognized CPA firm to assure us that we are up to date with all auditing standards and to assist us maintain maximum audit efficiencies.

To facilitate your evaluation of our qualifications and experience, we have arranged this proposal to include a resume of our firm, including our available staff, our extensive prior governmental and nonprofit auditing experience and clients to be contacted.

You need a firm that will provide an efficient, cost-effective, high-quality audit within critical time constraints. You need a firm with the prerequisite governmental and nonprofit experience to perform your audit according to stringent legal and regulatory requirements, a firm that understands the complex nature of community development districts and their unique compliance requirements. You need a firm with recognized governmental and nonprofit specialists within the finance and governmental communities. And, certainly, you need a firm that will provide you with valuable feedback to enhance your current and future operations. Berger, Toombs, Elam, Gaines & Frank, Certified Public Accountants, PL is that firm. J. W. Gaines is the person authorized to make representations for the firm.

Thank you again for the opportunity to submit this proposal to Summit View Community Development District.

Very truly yours,

Berger, Toombs, Elam, Gaines & Frank
Certified Public Accountants PL
Fort Pierce, Florida

PROFILE OF THE PROPOSER

Description and History of Audit Firm

Berger, Toombs, Elam, Gaines & Frank, Certified Public Accountants, PL is a Treasure Coast public accounting firm, which qualifies as a small business firm, as established by the Small Business Administration (13 CFR 121.38), with offices in Fort Pierce and Stuart. We are a member of the Florida Institute of Certified Public Accountants and the American Institute of Certified Public Accountants. The firm was formed from the merger of Edwards, Berger, Harris & Company (originated in 1972) and McAlpin, Curtis & Associates (originated in 1949). J. W. Gaines and Associates (originated in 1979) merged with the firm in 2004. Our tremendous growth rate experienced over the last 71 years is directly attributable to the firm's unrelenting dedication to providing the highest quality, responsive professional services attainable to its clients.

We are a member of the Private Companies Practice Section (PCPS) of the American Institute of Certified Public Accountants (AICPA) to assure we meet the highest standards. Membership in this practice section requires that our firm meet more stringent standards than standard AICPA membership. These rigorous requirements include the requirement of a triennial peer review of our firm's auditing and accounting practice and annual Continuing Professional Education (CPE) for all accounting staff (whether CPA or non-CPA). For standard AICPA membership, only a quality review is required and only CPAs must meet CPE requirements.

We are also a member of the Government Audit Quality Center ("the Center") of the American Institute of Certified Public Accountants to assure the quality of our government audits. Membership in the Center, which is voluntary, requires our firm to comply with additional standards to promote the quality of government audits.

We have been extensively involved in serving local government entities with professional accounting, auditing and consulting services throughout the entire 71 year history of our firm. Our substantial experience over the years makes us uniquely qualified to provide accounting, auditing, and consulting services to these clients. We are a recognized leader in providing services to governmental and nonprofit agencies on the Treasure Coast and in Central and South Florida, with extensive experience in auditing community development districts and water control districts. We were the independent auditors of the City of Fort Pierce for over 37 years and currently, we are the independent auditors for St. Lucie County since 2002, and for 38 of the 42 years that the county has been audited by CPA firms. Additionally, we have performed audits of the City of Stuart, the City of Vero Beach, Indian River County and Martin County. We also presently audit over 75 Community Development Districts throughout Florida.

Our firm was founded on the belief that we are better able to respond to our clients needs through education, experience, independence, quality control, and personal service. Our firm's commitment to quality is reflected in our endeavor of professional excellence via continuing education, the use of the latest computer technology, professional membership in PCPS and peer review.

We believe our approach to audit engagements, intelligence and innovation teamed with sound professional judgment enables us to explore new concepts while remaining sensitive to the fundamental need for practical solutions. We take pride in giving you the assurance that the personal assistance you receive comes from years of advanced training, technical experience and financial acumen.

Professional Staff Resources

Berger, Toombs, Elam, Gaines & Frank, Certified Public Accountants, PL has a total of 32 professional and administrative staff (including 14 professional staff with extensive experience servicing government entities). The work will be performed out of our Fort Pierce office with a proposed staff of one senior accountant and one or two staff accountants supervised by an audit manager and audit partner. With the exception of the directors of the firm's offices, the professional staff is not specifically assigned to any of our individual offices. The professional and administrative staff resources available to you through Berger, Toombs, Elam, Gaines & Frank, Certified Public Accountants, PL are as follows:

	<u>Total</u>
Partners/Directors (CPA's)	5
Principals (CPA)	1
Managers (CPA)	1
Senior/Supervisor Accountants (2 CPA's)	3
Staff Accountants (1 CPA)	9
Computer Specialist	1
Paraprofessional	8
Administrative	<u>4</u>
Total – all personnel	32

Following is a brief description of each employee classification:

Staff Accountant – Staff accountants work directly under the constant supervision of the auditor-in-charge and, are responsible for the various testing of documents, account analysis and any other duties as his/her supervisor believes appropriate. Minimum qualification for a staff accountant is graduation from an accredited university or college with a degree in accounting or equivalent.

Senior Accountant – A senior accountant must possess all the qualifications of the staff accountant, in addition to being able to draft the necessary reports and financial statements, and supervise other staff accountants when necessary.

Managers – A manager must possess the qualifications of the senior accountant, plus be able to work without extensive supervision from the auditor-in-charge. The manager should be able to draft audit reports from start to finish and to supervise the audit team, if necessary.

Principal – A principal is a partner/director in training. He has been a manager for several years and possesses the technical skills to act as the auditor-in-charge. A principal has no financial interest in the firm.

Partner/Director – The director has extensive governmental auditing experience and acts as the auditor-in-charge. Directors have a financial interest in the firm.

Professional Staff Resources (Continued)

Independence – Independence of the public accounting firm, with respect to the audit client, is the foundation from which the public gains its trust in the opinion issued by the public accounting firm at the end of the audit process. This independence must be in appearance as well as in fact. The public must perceive that the accounting firm is independent of the audit entity to ensure that nothing would compromise the opinion issued by the public accounting firm. **Berger, Toombs, Elam, Gaines & Frank, Certified Public Accountants, PL** is independent of Summit View Community Development District, including its elected officials and related parties, at the date of this proposal, as defined by the following rules, regulations, and standards:

AuSection 220 – Statements on Auditing Standards issued by the American Institute of Certified Public Accountants;

ET Sections 101 and 102 – Code of Professional Conduct of the American Institute of Certified Public Accountants;

Chapter 21A-1, Florida Administrative Code;

Section 473.315, Florida Statutes; and,

Government Auditing Standards, issued by the Comptroller General of the United States.

On an annual basis, all members of the firm are required to confirm, in writing, that they have no personal or financial relationships or holding that would impair their independence with regard to the firm's clients.

Independence is a hallmark of our profession. We encourage our staff to use professional judgment in situations where our independence could be impaired or the perception of a conflict of interest might exist. In the governmental sector, public perception is as important as professional standards. Therefore, the utmost care must be exercised by independent auditors in the performance of their duties.

Ability to Furnish the Required Services

As previously noted in the Profile of the Proposer section of this document, our firm has been in existence for over 69 years. We have provided audit services to some clients for over 30 years continually. Our firm is insured against physical loss through commercial insurance and we also carry liability insurance. The majority of our audit documentation is stored electronically, both on our office network and on each employee laptop or computer assigned to each specific job. Our office computer network is backed up on tape, so in the event of a total equipment loss, we can restore all data as soon as replacement equipment is acquired. In addition, our field laptop computers carry the same data and can be used in the event of emergency with virtually no delay in completing the required services.

ADDITIONAL SERVICES PROVIDED

Arbitrage Rebate Services

Berger, Toombs, Elam, Gaines & Frank, Certified Public Accountants, PL also provides arbitrage rebate compliance and related services to governmental issuers. The Tax Reform Act of 1986 requires issuers of most tax-exempt obligations to pay (i.e., “rebate”) to the United States government any arbitrage profits. Arbitrage profits are earnings on the investment of bond proceeds and certain other monies in excess of what would have been earned had such monies been invested at a yield equal to the yield on the bonds.

Federal tax law requires that interim rebate calculations and payments are due at the end of every fifth bond year. Final payment is required upon redemption of the bonds. More frequent calculations may be deemed advisable by an issuer’s auditor, trustee or bond counsel or to assure that accurate and current records are available. These more frequent requirements are usually contained in the Arbitrage or Rebate Certificate with respect to the bonds.

Our firm performs a comprehensive rebate analysis and includes the following:

- Verifying that the issue is subject to rebate;
- Calculating the bond yield;
- Identifying, and separately accounting for, all “Gross Proceeds” (as that term is defined in the Code) of the bond issue, including those requiring analysis due to “transferred proceeds” and/or “commingled funds” circumstances;
- Determining what general and/or elective options are available to Gross proceeds of the issue;
- Calculating the issue’s excess investment earning (rebate liability), if any;
- Delivering appropriate documentation to support all calculations;
- Providing an executive summary identifying the methodology employed, major assumptions, conclusions, and any other recommendations for changes in recordkeeping and investment policies;
- Assisting as necessary in the event of an Internal Revenue Service inquiry; and,
- Consulting with issue staff, as necessary, regarding arbitrage related matters.

GOVERNMENTAL AUDITING EXPERIENCE

Berger, Toombs, Elam, Gaines & Frank, Certified Public Accountants, PL has been practicing public accounting in Florida for 69 years. Our success over the years has been the result of a strong commitment to providing personalized quality service to our clients.

The current members of our firm have performed audits of over 900 community development districts, and over 1,800 audits of municipalities, counties and other governmental entities such as the City of Fort Pierce and St. Lucie County.

Our firm provides a variety of accounting, auditing, tax litigation support, and consulting services. Some of the professional accounting, auditing and management consulting services that are provided by our firm are listed below:

- Performance of annual financial and compliance audits, including Single Audits of state and federal financial assistance programs, under the provisions of the Single Audit Act, Subpart F of Title 2 U.S. Code of Federal Regulations (CFR) Part 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (Uniform Guidance), with minimal disruptions to your operations;
- Performance of special compliance audits to ascertain compliance with the applicable local, state and federal laws and regulations;
- Issuance of comfort letters and consent letters in conjunction with the issuance of tax-exempt debt obligations, including compiling financial data and interim period financial statement reviews;
- Calculation of estimated and actual federal arbitrage rebates;
- Assistance in compiling historical financial data for first-time and supplemental submissions for GFOA Certificate of Achievement for Excellence in Financial Reporting;
- Preparation of indirect cost allocation systems in accordance with Federal and State regulatory requirements;
- Providing human resource and employee benefit consulting;
- Performance of automation feasibility studies and disaster recovery plans;
- Performance feasibility studies concerning major fixed asset acquisitions and utility plant expansion plans (including electric, water, pollution control, and sanitation utilities); and
- Assistance in litigation, including testimony in civil and criminal court.
- Assist clients who utilize QuickBooks software with their software needs. Our Certified QuickBooks Advisor has undergone extensive training through QuickBooks and has passed several exams to attain this Certification.

Continuing Professional Education

All members of the governmental audit staff of our firm, and audit team members assigned to this engagement, are in compliance with the Continuing Professional Education (CPE) requirements set forth in Government Auditing Standards issued by the Comptroller General of the United States. In addition, our firm is in compliance with the applicable provisions of the Florida Statutes that require CPA's to have met certain CPE requirements prior to proposing on governmental audit engagements.

GOVERNMENTAL AUDITING EXPERIENCE (CONTINUED)

The audit team has extensive experience in performing governmental audits and is exposed to intensive and continuing concentration on these types of audits. Due to the total number of governmental audits our team performs, each member of our governmental staff must understand and be able to perform several types of governmental audits. It is our objective to provide each professional employee fifty hours or more of comprehensive continuing professional education each year. This is accomplished through attending seminars throughout Florida and is reinforced through in-house training.

Our firm has made a steadfast commitment to professional education. Our active attendance and participation in continuing professional education is a major part of our objective to obtain the most recent knowledge on issues which are of importance to our clients. We are growing on the reputation for work that our firm is providing today.

Quality Control Program

Quality control requires continuing commitment to professional excellence. **Berger, Toombs, Elam, Gaines & Frank, Certified Public Accountants, PL** is formally dedicated to that commitment.

To ensure maintaining the standards of working excellence required by our firm, we joined the Private Companies Practice Section (PCPS) of the American Institute of Certified Public Accountants (AICPA). To be a participating member firm of this practice section, a firm must obtain an independent Peer Review of its quality control policies and procedures to ascertain the firm's compliance with existing auditing standards on the applicable engagements.

The scope of the Peer Review is comprehensive in that it specifically reviews the following quality control policies and procedures of the participating firm:

- Professional, economic, and administrative independence;
- Assignment of professional personnel to engagements;
- Consultation on technical matters;
- Supervision of engagement personnel;
- Hiring and employment of personnel;
- Professional development;
- Advancement;
- Acceptance and continuation of clients; and,
- Inspection and review system.

We believe that our commitment to the program is rewarding not only to our firm, but primarily to our clients.

The external independent Peer Review of the elements of our quality control policies and procedures performed by an independent certified public accountant, approved by the PCPS of the AICPA, provides you with the assurance that we continue to conform to standards of the profession in the conduct of our accounting and auditing practice.

GOVERNMENTAL AUDITING EXPERIENCE (CONTINUED)

Our firm is also a member of Governmental Audit Quality Center (GAQC), a voluntary membership center for CPA firms that perform governmental audits. This center promotes the quality of governmental audits.

Our firm has completed successive Peer Reviews. These reviews included a representative sample of our firm's local governmental auditing engagements. As a result of these reviews, our firm obtained an unqualified opinion on our quality control program and work procedures. On page 31 is a copy of our most recent Peer Review report. It should be noted that we received a pass rating.

Our firm has never had any disciplinary actions by state regulatory bodies or professional organizations.

As our firm performs approximately one hundred fifty audits each year that are reviewed by federal, state or local entities, we are constantly dealing with questions from these entities about our audits. We are pleased to say that any questions that have been raised were minor issues and were easily resolved without re-issuing any reports.

Certificate of Achievement for Excellence in Financial Reporting (CAFR)

We are proud and honored to have been involved with the City of Fort Pierce and the Fort Pierce Utilities Authority when they received their first Certificates of Achievement for Excellence in Financial Reporting for the fiscal years ended September 30, 1988 and 1994, respectively. We were also instrumental in the City of Stuart receiving the award, in our first year of performing their audit, for the year ended September 30, 1999.

We also assisted St. Lucie County, Florida for the year ended September 30, 2003, in preparing their first Comprehensive Annual Financial Report, and St. Lucie County has received their Certificate of Achievement for Excellence in Financial Reporting every year since.

As continued commitment to insuring that we are providing the highest level of experience, we have had at least one employee of our firm serve on the GFOA – Special Review Committee since the mid-1980s. This committee is made up of selective Certified Public Accountants throughout the United States who have demonstrated their high level of knowledge and expertise in governmental accounting. Each committee member attends a special review meeting at the Annual GFOA Conference. At this meeting, the committee reports on the Certificate of Achievement Program's most recent results, future goals, and common reporting deficiencies.

We feel that our previous experience in assisting the City of Fort Pierce, the Fort Pierce Utilities Authority and St. Lucie County obtain their first CAFRs, and the City of Stuart in continuing to receive a CAFR and our firm's continued involvement with the GFOA, and the CAFR review committee make us a valued asset for any client in the field of governmental financial reporting.

GOVERNMENTAL AUDIT EXPERIENCE (CONTINUED)

References

Terracina Community Development
District
Jeff Walker, Special District Services
(561) 630-4922

Gateway Community Development
District
Stephen Bloom, Severn Trent Management
(954) 753-5841

The Reserve Community Development District

Darrin Mossing, Governmental Management
Services LLC
(407) 841-5524

Port of the Islands Community Development
District
Cal Teague, Premier District Management

(239) 690-7100 ext 101

In addition to the above, we have the following additional governmental audit experience:

Community Development Districts

Aberdeen Community Development
District

Beacon Lakes Community
Development District

Alta Lakes Community Development
District

Beaumont Community Development
District

Amelia Concourse Community
Development District

Bella Collina Community Development
District

Amelia Walk Community
Development District

Bonnet Creek Community
Development District

Aqua One Community Development
District

Buckeye Park Community
Development District

Arborwood Community Development
District

Candler Hills East Community
Development District

Arlington Ridge Community
Development District

Cedar Hammock Community
Development District

Bartram Springs Community
Development District

Central Lake Community
Development District

Baytree Community Development
District

Channing Park Community
Development District

GOVERNMENTAL AUDIT EXPERIENCE (CONTINUED)

Cheval West Community Development District	Evergreen Community Development District
Coconut Cay Community Development District	Forest Brooke Community Development District
Colonial Country Club Community Development District	Gateway Services Community Development District
Connerton West Community Development District	Gramercy Farms Community Development District
Copperstone Community Development District	Greenway Improvement District
Creekside @ Twin Creeks Community Development District	Greyhawk Landing Community Development District
Deer Run Community Development District	Griffin Lakes Community Development District
Dowden West Community Development District	Habitat Community Development District
DP1 Community Development District	Harbor Bay Community Development District
Eagle Point Community Development District	Harbourage at Braden River Community Development District
East Nassau Stewardship District	Harmony Community Development District
Eastlake Oaks Community Development District	Harmony West Community Development District
Easton Park Community Development District	Harrison Ranch Community Development District
Estancia @ Wiregrass Community Development District	Hawkstone Community Development District

GOVERNMENTAL AUDIT EXPERIENCE (CONTINUED)

Heritage Harbor Community Development District	Madeira Community Development District
Heritage Isles Community Development District	Marhsall Creek Community Development District
Heritage Lake Park Community Development District	Meadow Pointe IV Community Development District
Heritage Landing Community Development District	Meadow View at Twin Creek Community Development District
Heritage Palms Community Development District	Mediterra North Community Development District
Heron Isles Community Development District	Midtown Miami Community Development District
Heron Isles Community Development District	Mira Lago West Community Development District
Highland Meadows II Community Development District	Montecito Community Development District
Julington Creek Community Development District	Narcoossee Community Development District
Laguna Lakes Community Development District	Naturewalk Community Development District
Lake Bernadette Community Development District	New Port Tampa Bay Community Development District
Lakeside Plantation Community Development District	Overoaks Community Development District
Landings at Miami Community Development District	Panther Trace II Community Development District
Legends Bay Community Development District	Paseo Community Development District
Lexington Oaks Community Development District	Pine Ridge Plantation Community Development District
Live Oak No. 2 Community Development District	Piney Z Community Development District

GOVERNMENTAL AUDIT EXPERIENCE (CONTINUED)

Poinciana Community Development District	Sampson Creek Community Development District
Poinciana West Community Development District	San Simeon Community Development District
Port of the Islands Community Development District	Six Mile Creek Community Development District
Portofino Isles Community Development District	South Village Community Development District
Quarry Community Development District	Southern Hills Plantation I Community Development District
Renaissance Commons Community Development District	Southern Hills Plantation III Community Development District
Reserve Community Development District	South Fork Community Development District
Reserve #2 Community Development District	St. John's Forest Community Development District
River Glen Community Development District	Stoneybrook South Community Development District
River Hall Community Development District	Stoneybrook South at ChampionsGate Community Development District
River Place on the St. Lucie Community Development District	Stoneybrook West Community Development District
Rivers Edge Community Development District	Tern Bay Community Development District
Riverwood Community Development District	Terracina Community Development District
Riverwood Estates Community Development District	Tison's Landing Community Development District
Rolling Hills Community Development District	TPOST Community Development District
Rolling Oaks Community Development District	

GOVERNMENTAL AUDIT EXPERIENCE (CONTINUED)

Triple Creek Community Development District	Vizcaya in Kendall Development District
TSR Community Development District	Waterset North Community Development District
Turnbull Creek Community Development District	Westside Community Development District
Twin Creeks North Community Development District	WildBlue Community Development District
Urban Orlando Community Development District	Willow Creek Community Development District
Verano #2 Community Development District	Willow Hammock Community Development District
Viera East Community Development District	Winston Trails Community Development District
VillaMar Community Development District	Zephyr Ridge Community Development District

GOVERNMENTAL AUDIT EXPERIENCE (CONTINUED)

Other Governmental Organizations

City of Westlake	Office of the Medical Examiner, District 19
Florida Inland Navigation District	Rupert J. Smith Law Library of St. Lucie County
Fort Pierce Farms Water Control District	St. Lucie Education Foundation
Indian River Regional Crime Laboratory, District 19, Florida	Seminole Improvement District
Viera Stewardship District	Troup Indiantown Water Control District

Current or Recent Single Audits.

St. Lucie County, Florida Early Learning Coalition, Inc. Treasure Coast Food Bank, Inc.	Gateway Services Community Development District
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Members of our audit team have acquired extensive experience from performing or participating in over 2,100 audits of governments, independent special taxing districts, school boards, and other agencies that receive public money and utilize fund accounting.

Much of our firm's auditing experience is with compliance auditing, which is required for publicly financed agencies. In this type of audit, we do a financial examination and also confirm compliance with various statutory and regulatory guidelines.

Following is a summary of our other experience, including Auditor General experience, as it pertains to other governmental and fund accounting audits.

Counties

(Includes elected constitutional officers, utilities and dependent taxing districts)

Indian River
Martin
Okeechobee
Palm Beach

Municipalities

City of Port St. Lucie
City of Vero Beach
Town of Orchid

GOVERNMENTAL AUDIT EXPERIENCE (CONTINUED)

Special Districts

Bannon Lakes Community Development District
Boggy Creek Community Development District
Capron Trail Community Development District
Celebration Pointe Community Development District
Coquina Water Control District
Diamond Hill Community Development District
Dovera Community Development District
Durbin Crossing Community Development District
Golden Lakes Community Development District
Lakewood Ranch Community Development District
Martin Soil and Water Conservation District
Meadow Pointe III Community Development District
Myrtle Creek Community Development District
St. Lucie County – Fort Pierce Fire District
The Crossings at Fleming Island
St. Lucie West Services District
Indian River County Mosquito Control District
St. John's Water Control District
Westchase and Westchase East Community Development Districts
Pier Park Community Development District
Verandahs Community Development District
Magnolia Park Community Development District

Schools and Colleges

Federal Student Aid Programs – Indian River Community College
Indian River Community College
Okeechobee County District School Board
St. Lucie County District School Board

State and County Agencies

Central Florida Foreign-Trade Zone, Inc. (a nonprofit organization affiliated with the St. Lucie County Board of County Commissioners)
Florida School for Boys at Okeechobee
Indian River Community College Crime Laboratory
Indian River Correctional Institution

FEE SCHEDULE

We propose the fee for our audit services described below to be \$4,650 for the years ended September 30, 2021 and 2022, \$4,775 for the year ended September 30, 2023, and \$4,925 for the years ended September 30, 2024 and 2025. The fee is contingent upon the financial records and accounting systems of Summit View Community Development District being “audit ready” and the financial activity for the District is not materially increased. If we discover that additional preparation work or subsidiary schedules are needed, we will consult with your authorized representative. We can assist with this additional work at our standard rates should you desire.

SCOPE OF WORK TO BE PERFORMED

If selected as the District's auditors, we will perform a financial and compliance audit in accordance with Section 11.45, Florida Statutes, in order to express an opinion on an annual basis on the financial statements of Summit View Community Development District as of September 30, 2021, 2022, 2023, 2024, and 2025. The audits will be performed to the extent necessary to express an opinion on the fairness in all material respects with which the financial statements present the financial position, results of operations and changes in financial position in conformity with generally accepted accounting principles and to determine whether, for selected transactions, operations are properly conducted in accordance with legal and regulatory requirements. Reportable conditions that are also material weaknesses shall be identified as such in the Auditors' Report on Internal Control over Financial Reporting and on Compliance and Other Matters. Other (non-reportable) conditions discovered during the course of the audit will be reported in a separate letter to management, which will be referred to in the Auditors' Report on Internal Control over Financial Reporting and on Compliance and Other Matters.

Our audit will be performed in accordance with standards for financial and compliance audits contained in *Government Auditing Standards*, as well as in compliance with rules and regulations of audits of special districts as set forth by the State Auditor General in Chapter 10.550, Local Governmental Entity Audits, and other relevant federal, state and county orders, statutes, ordinances, charter, resolutions, bond covenants, Administrative Code and procedures, or rules and regulations which may pertain to the work required in the engagement.

The primary purpose of our audit will be to express an opinion on the financial statements discussed above. It should be noted that such audits are subject to the inherent risk that errors or irregularities may not be detected. However, if conditions are discovered which lead to the belief that material errors, defalcations or other irregularities may exist or if other circumstances are encountered that require extended services, we will promptly notify the appropriate individual.

Commitment to Quality Service

Personnel Qualifications and Experience

J. W. Gaines, CPA, CITP

Director – 41 years

Education

- ◆ Stetson University, B.B.A. – Accounting

Registrations

- ◆ Certified Public Accountant – State of Florida, State Board of Accountancy
- ◆ Certified Information Technology Professional (CITP) – American Institute of Certified Public Accountants

Professional Affiliations/Community Service

- ◆ Member of the American and Florida Institutes of Certified Public Accountants
- ◆ Affiliate member Government Finance Officers Association
- ◆ Past President, Vice President-Campaign Chairman, Vice President and Board Member of United Way of St. Lucie County, 1989 - 1994
- ◆ Past President, President Elect, Secretary and Treasurer of the Treasure Coast Chapter of the Florida Institute of Certified Public Accountants, 1988 - 1991
- ◆ Past President of Ft. Pierce Kiwanis Club, 1994 - 95, Member/Board Member since 1982
- ◆ Past President, Vice President and Treasurer of St. Lucie County Chapter of the American Cancer Society, 1980 -1986
- ◆ Member of the St. Lucie County Chamber of Commerce, Member Board of Directors, Treasurer, September 2002 - 2006, Chairman Elect 2007, Chairman 2008, Past Chairman 2009
- ◆ Member Lawnwood Regional Medical Center Board of Trustees, 2000 – Present, Chairman 2013 - Present
- ◆ Member of St. Lucie County Citizens Budget Committee, 2001 – 2002
- ◆ Member of Ft. Pierce Citizens Budget Advisory Committee, 2010 – 2011
- ◆ Member of Ft. Pierce Civil Service Appeals Board, 2013 - Present

Professional Experience

- ◆ Miles Grant Development/Country Club – Stuart, Florida, July 1975 – October 1976
- ◆ State Auditor General's Office – Public Accounts Auditor – November 1976 through September 1979
- ◆ Director - Berger, Toombs, Elam, Gaines & Frank, Certified Public Accountants PL, responsible for numerous government and nonprofit audits.
- ◆ Over 40 years experience in all phases of public accounting and auditing experience, with a concentration in financial and compliance audits. Mr. Gaines has been involved in all phases of the audits listed on the preceding pages.

Commitment to Quality Service

Personnel Qualifications and Experience
--

J. W. Gaines, CPA, CITP (Continued)

Director

Continuing Professional Education

- ♦ Has participated in numerous continuing professional education courses provided by nationally recognized sponsors over the last two years to keep abreast of the latest developments in accounting and auditing such as:
 - Governmental Accounting Report and Audit Update
 - Analytical Procedures, FICPA
 - Annual Update for Accountants and Auditors
 - Single Audit Sampling and Other Considerations

Commitment to Quality Service

Personnel Qualifications and Experience

David S. McGuire, CPA, CITP

Accounting and Audit Principal – 18 years

Accounting and Audit Manager – 4 years

Staff Accountant – 11 years

Education

- ◆ University of Central Florida, B.A. – Accounting
- ◆ Barry University – Master of Professional Accountancy

Registrations

- ◆ Certified Public Accountant – State of Florida, State Board of Accountancy
- ◆ Certified Information Technology Professional (CITP) – American Institute of Certified Public Accountants
- ◆ Certified Not-For-Profit Core Concepts 2018

Professional Affiliations/Community Service

- ◆ Member of the American and Florida Institutes of Certified Public Accountants
- ◆ Associate Member, Florida Government Finance Office Associates
- ◆ Assistant Coach – St. Lucie County Youth Football Organization (1994 – 2005)
- ◆ Assistant Coach – Greater Port St. Lucie Football League, Inc. (2006 – 2010)
- ◆ Board Member – Greater Port St. Lucie Football League, Inc. (2011 – 2017)
- ◆ Treasurer, AIDS Research and Treatment Center of the Treasure Coast, Inc. (2000 – 2003)
- ◆ Board Member/Treasurer, North Treasure Coast Chapter, American Red Cross (2004 – 2010)
- ◆ Member/Board Member of Port St. Lucie Kiwanis (1994 – 2001)
- ◆ President (2014/15) of Sunrise Kiwanis of Fort Pierce (2004 – 2017)
- ◆ St. Lucie District School Board Superintendent Search Committee (2013 – present)
- ◆ Board Member – Phrozen Pharos (2019-2021)

Professional Experience

- ◆ Twenty-eight years public accounting experience with an emphasis on nonprofit and governmental organizations.
- ◆ Audit Manager in-charge on a variety of audit and review engagements within several industries, including the following government and nonprofit organizations:
 - St. Lucie County, Florida
 - 19th Circuit Office of Medical Examiner
 - Troup Indiantown Water Control District
 - Exchange Club Center for the Prevention of Child Abuse, Inc.
 - Healthy Kids of St. Lucie County
 - Mustard Seed Ministries of Ft. Pierce, Inc.
 - Reaching Our Community Kids, Inc.
 - Reaching Our Community Kids - South
 - St. Lucie County Education Foundation, Inc.
 - Treasure Coast Food Bank, Inc.
 - North Springs Improvement District
- ◆ Four years of service in the United States Air Force in computer operations, with a top secret (SCI/SBI) security clearance.

Commitment to Quality Service

Personnel Qualifications and Experience

David S. McGuire, CPA, CITP (Continued)

Accounting and Audit Principal

Continuing Professional Education

- ◆ Mr. McGuire has attended numerous continuing professional education courses and seminars taught by nationally recognized sponsors in the accounting auditing and single audit compliance areas. He has attended courses over the last two years in those areas as follows:

- Not-for-Profit Auditing Financial Results and Compliance Requirements

- Update: Government Accounting Reporting and Auditing

- Annual Update for Accountants and Auditors

Commitment to Quality Service

Personnel Qualifications and Experience

David F. Haughton, CPA

Accounting and Audit Manager – 30 years

Education

- ◆ Stetson University, B.B.A. – Accounting

Registrations

- ◆ Certified Public Accountant – State of Florida, State Board of Accountancy

Professional Affiliations/Community Service

- ◆ Member of the American and Florida Institutes of Certified Public Accountants
- ◆ Former Member of Florida Institute of Certified Public Accountants Committee on State and Local Government
- ◆ Affiliate Member Government Finance Officers Association (GFOA) for over 10 years
- ◆ Affiliate Member Florida Government Finance Officers Association (FGFOA) for over 10 years
- ◆ Technical Review – 1997 FICPA Course on State and Local Governments in Florida
- ◆ Board of Directors – Kiwanis of Ft. Pierce, Treasurer – 1994-1999; Vice President – 1999-2001

Professional Experience

- ◆ Twenty-seven years public accounting experience with an emphasis on governmental and nonprofit organizations.
- ◆ State Auditor General's Office – West Palm Beach, Staff Auditor, June 1985 to September 1985
- ◆ Accounting and Audit Manager of Berger, Toombs, Elam, Gaines & Frank, Certified Public Accountants PL, responsible for audit and accounting services including governmental and not-for-profit audits.
- ◆ Over 20 years of public accounting and governmental experience, specializing in governmental and nonprofit organizations with concentration in special districts, including Community Development Districts which provide services including water and sewer utilities. Governmental and non-profit entities served include the following:

Counties:

St. Lucie County

Municipalities:

City of Fort Pierce

City of Stuart

Commitment to Quality Service

Personnel Qualifications and Experience

David F. Haughton, CPA (Continued)

Accounting and Audit Manager

Professional Experience (Continued)

Special Districts:

Bluewaters Community Development District
Country Club of Mount Dora Community Development District
Fiddler's Creek Community Development District #1 and #2
Indigo Community Development District
North Springs Improvement District
Renaissance Commons Community Development District
St. Lucie West Services District
Stoneybrook Community Development District
Summerville Community Development District
Terracina Community Development District
Thousand Oaks Community Development District
Tree Island Estates Community Development District
Valencia Acres Community Development District

Non-Profits:

The Dunbar Center, Inc.
Hibiscus Children's Foundation, Inc.
Hope Rural School, Inc.
Maritime and Yachting Museum of Florida, Inc.
Tykes and Teens, Inc.
United Way of Martin County, Inc.
Workforce Development Board of the Treasure Coast, Inc.

- ◆ While with the Auditor General's Office he was on the staff for the state audits of the Martin County School District and Okeechobee County School District.
- ◆ During 1997 he performed a technical review of the Florida Institute of Certified Public Accountants state CPE course on Audits of State and Local Governments in Florida. His comments were well received by the author and were utilized in future updates to the course.

Continuing Professional Education

- ◆ During the past several years, he has participated in numerous professional development training programs sponsored by the AICPA and FICPA, including state conferences on special districts and governmental auditing in Florida. He averages in excess of 100 hours bi-annually of advanced training which exceeds the 80 hours required in accordance with the continuing professional education requirements of the Florida State Board of accountancy and the AICPA Private Companies Practice Section. He has over 75 hours of governmental CPE credit within the past two years.

Commitment to Quality Service

Personnel Qualifications and Experience
--

Matthew Gonano, CPA

Senior Staff Accountant – 10 years

Education

- ◆ University of North Florida, B.B.A. – Accounting
- ◆ University of Alicante, Spain – International Business
- ◆ Florida Atlantic University – Masters of Accounting

Professional Affiliations/Community Service

- ◆ American Institute of Certified Public Accountants
- ◆ Florida Institute of Certified Public Accountants

Professional Experience

- ◆ Senior Accountant with Berger, Toombs, Elam, Gaines, & Frank providing professional services to nonprofit and governmental entities.
- ◆ Performed audits of nonprofit and governmental organizations in accordance with Governmental Accounting Auditing Standards (GAAS)
- ◆ Performed Single Audits of nonprofit organizations in accordance with OMB Circular A-133, Audits of State, Local Governments, and Non-Profit Organizations.

Continuing Professional Education

- ◆ Mr. Gonano has participated in numerous continuing professional education courses.

Commitment to Quality Service

Personnel Qualifications and Experience
--

Paul Daly

Staff Accountant – 9 years

Education

- ♦ Florida Atlantic University, B.S. – Accounting

Professional Experience

- ♦ Staff Accountant with Berger, Toombs, Elam, Gaines, & Frank providing professional services to nonprofit and governmental entities.

Continuing Professional Education

- ♦ Working to attain the requirements to take the Certified Public Accounting (CPA) exam.

Commitment to Quality Service

Personnel Qualifications and Experience
--

Melissa Marlin, CPA

Senior Staff Accountant – 7 years

Education

- ◆ Indian River State College, A.A. – Accounting
- ◆ Florida Atlantic University, B.B.A. – Accounting

Professional Experience

- ◆ Staff accountant with Berger, Toombs, Elam, Gaines, & Frank providing professional services to nonprofit and governmental entities.

Continuing Professional Education

- ◆ Mrs. Marlin participates in numerous continuing professional education courses provided by nationally recognized sponsors to keep abreast of the latest developments.
- ◆ Mrs. Marlin is currently studying to pass the CPA exam.

Commitment to Quality Service

Personnel Qualifications and Experience
--

Bryan Snyder

Staff Accountant – 5 years

Education

- ◆ Florida Atlantic University, B.B.A. – Accounting

Professional Experience

- ◆ Accountant beginning his professional auditing career with Berger, Toombs, Elam, Gaines, & Frank.
- ◆ Mr. Snyder is gaining experience auditing governmental & nonprofit entities.

Continuing Professional Education

- ◆ Mr. Snyder participates in numerous continuing education courses and plans on working to acquire his CPA certificate.
- ◆ Mr. Snyder is currently studying to pass the CPA exam.

Commitment to Quality Service

Personnel Qualifications and Experience
--

Maritza Stonebraker

Staff Accountant – 4 years

Education

- ◆ Indian River State College, B.S.A. – Accounting

Professional Experience

- ◆ Staff Accountant beginning her professional auditing career with Berger, Toombs, Elam, Gaines, & Frank.

Continuing Professional Education

- ◆ Mrs. Stonebraker participates in numerous continuing education courses and plans on acquiring her CPA.
- ◆ Mrs. Stonebraker is currently studying to pass the CPA exam.

Commitment to Quality Service

Personnel Qualifications and Experience
--

Jonathan Herman, CPA

Senior Staff Accountant – 7 years

Education

- ◆ University of Central Florida, B.S. – Accounting
- ◆ Florida Atlantic University, MACC

Professional Experience

- ◆ Accounting graduate with five years experience with Berger, Toombs, Elam, Gaines, & Frank providing professional services to nonprofit and governmental entities.

Continuing Professional Education

- ◆ Mr. Herman participates in numerous continuing professional education courses provided by nationally recognized sponsors to keep abreast of the latest developments.

Commitment to Quality Service

Personnel Qualifications and Experience
--

Sean Stanton, CPA

Staff Accountant – 4 years

Education

- ◆ University of South Florida, B.S. – Accounting
- ◆ Florida Atlantic University, M.B.A. – Accounting

Professional Experience

- ◆ Staff accountant with Berger, Toombs, Elam, Gaines, & Frank auditing governmental and non-profit entities.

Continuing Professional Education

- ◆ Mr. Stanton participates in numerous continuing professional education courses provided by nationally recognized sponsors to keep abreast of the latest developments.

Commitment to Quality Service

Personnel Qualifications and Experience
--

Taylor Nuccio

Staff Accountant – 3 years

Education

- ◆ Indian River State College, B.S.A. – Accounting

Professional Experience

- ◆ Staff Accountant with Berger, Toombs, Elam, Gaines, & Frank providing professional services to nonprofit and governmental entities.

Continuing Professional Education

- ◆ Ms. Nuccio participates in numerous continuing professional education courses provided by nationally recognized sponsors to keep abreast of the latest developments.
- ◆ Ms. Nuccio is currently working towards completing an additional 30 hours of education to qualify to sit for CPA exam.

Commitment to Quality Service

Personnel Qualifications and Experience
--

Kirk Vasser

Staff Accountant – 1 year

Education

- ♦ Indian River State College, B.S.A. – Accounting

Professional Experience

- ♦ Staff Accountant with Berger, Toombs, Elam, Gaines, & Frank providing professional services to nonprofit and governmental entities.

Continuing Professional Education

- ♦ Mr. Vasser participates in numerous continuing professional education courses provided by nationally recognized sponsors to keep abreast of the latest developments.
- ♦ Mr. Vasser is currently working towards completing an additional 30 hours of education to qualify to sit for CPA exam.

Commitment to Quality Service

Personnel Qualifications and Experience
--

Madison Ballash

Staff Accountant – 1 year

Education

- ◆ Indian River State College, B.S.A. – Accounting (May 2020)

Professional Experience

- ◆ Staff Accountant with Berger, Toombs, Elam, Gaines, & Frank providing professional services to nonprofit and governmental entities.

Continuing Professional Education

- ◆ Ms. Ballash participates in numerous continuing professional education courses provided by nationally recognized sponsors to keep abreast of the latest developments.
- ◆ Ms. Ballash is currently working towards completing an additional 30 hours of education to qualify to sit for CPA exam.



Judson B. Baggett 6815 Dairy Road
MBA, CPA, CVA, Partner Zephyrhills, FL 33542
Marci Reutimann (813) 788-2155
CPA, Partner (813) 782-8606

Report on the Firm's System of Quality Control

To the Partners
Berger, Toombs, Elam, Gaines & Frank, CPAs, PL
and the Peer Review Committee of the Florida Institute of Certified Public Accountants

October 30, 2019

We have reviewed the system of quality control for the accounting and auditing practice of Berger, Toombs, Elam, Gaines & Frank, CPAs, PL, (the firm), in effect for the year ended May 31, 2019. Our peer review was conducted in accordance with the Standards for Performing and Reporting on Peer Reviews established by the Peer Review Board of the American Institute of Certified Public Accountants (Standards).

A summary of the nature, objectives, scope, limitations of, and the procedures performed in a System Review as described in the Standards may be found at aicpa.org/prsummary. The summary also includes an explanation of how engagements identified as not performed or reported in conformity with applicable professional standards, if any, are evaluated by a peer reviewer to determine a peer review rating.

Firm's Responsibility

The firm is responsible for designing a system of quality control and complying with it to provide the firm with reasonable assurance of performing and reporting in conformity with applicable professional standards in all material respects. The firm is also responsible for evaluating actions to promptly remediate engagements deemed as not performed or reported in conformity with professional standards, when appropriate, and for remediating weaknesses in its system of quality control, if any.

Peer Reviewer's Responsibility

Our responsibility is to express an opinion on the design of the system of quality control, and the firm's compliance therewith based on our review.

Required Selections and Considerations

Engagements selected for review included engagements performed under *Government Auditing Standards*, including a compliance audit under the Single Audit Act.

As a part of our peer review, we considered reviews by regulatory entities as communicated by the firm, if applicable, in determining the nature and extent of our procedures.

Opinion

In our opinion, the system of quality control for the accounting and auditing practice of Berger, Toombs, Elam, Gaines & Frank, CPAs, PL, in effect for the year ended May 31, 2019, has been suitably designed and complied with to provide the firm with reasonable assurance of performing and reporting in conformity with applicable professional standards in all material respects. Firms can receive a rating of *pass*, *pass with deficiency(ies)*, or *fail*. Berger, Toombs, Elam, Gaines & Frank, CPAs, PL has received a peer review rating of *pass*.

Baggett, Reutimann & Associates, CPAs, PA
BAGGETT, REUTIMANN & ASSOCIATES, CPAS, PA
Signed Electronically by Baggett, Reutimann & Associates, CPAs, PA, (NY 11853) email: judb@baggettcpa.com

Member American Institute of Certified Public Accountants (AICPA) and Florida Institute of Certified Public Accountants (FICPA)
National Association of Certified Valuation Analysts (NACVA)

**SUMMIT VIEW COMMUNITY DEVELOPMENT DISTRICT
REQUEST FOR PROPOSALS**

District Auditing Services for Fiscal Years 2021-2025
Pasco County, Florida

INSTRUCTIONS TO PROPOSERS

SECTION 1. DUE DATE. Sealed proposals must be received no later than February 21, 2020, at 12:00 p.m., at the offices of District Manager, located at 12750 Citrus Park Lane, Suite 115, Tampa, Florida 33625. Proposals will be publicly opened at that time.

SECTION 2. FAMILIARITY WITH THE LAW. By submitting a proposal, the Proposer is assumed to be familiar with all federal, state, and local laws, ordinances, rules and regulations that in any manner affect the work. Ignorance on the part of the Proposer will in no way relieve it from responsibility to perform the work covered by the proposal in compliance with all such laws, ordinances and regulations.

SECTION 3. QUALIFICATIONS OF PROPOSER. The contract, if awarded, will only be awarded to a responsible Proposer who is qualified by experience and licensing to do the work specified herein. The Proposer shall submit with its proposal satisfactory evidence of experience in similar work and show that it is fully prepared to complete the work to the satisfaction of the District.

SECTION 4. SUBMISSION OF ONLY ONE PROPOSAL. Proposers shall be disqualified and their proposals rejected if the District has reason to believe that collusion may exist among the Proposers, the Proposer has defaulted on any previous contract or is in arrears on any previous or existing contract, or for failure to demonstrate proper licensure and business organization.

SECTION 5. SUBMISSION OF PROPOSAL. Submit seven (7) copies of the Proposal Documents, and other requested attachments at the time and place indicated herein, which shall be enclosed in an opaque sealed envelope, marked with the title "Auditing Services – Summit View Community Development District" on the face of it.

SECTION 6. MODIFICATION AND WITHDRAWAL. Proposals may be modified or withdrawn by an appropriate document duly executed and delivered to the place where proposals are to be submitted at any time prior to the time and date the proposals are due. No proposal may be withdrawn after opening for a period of ninety (90) days.

SECTION 7. PROPOSAL DOCUMENTS. The proposal documents shall consist of the notice announcing the request for proposals, these instructions, the Evaluation Criteria Sheet and a proposal with all required documentation pursuant to Section 12 of these instructions (the "Proposal Documents").

SECTION 8. PROPOSAL. In making its proposal, each Proposer represents that it has read and understands the Proposal Documents and that the proposal is made in accordance therewith.

SECTION 9. BASIS OF AWARD/RIGHT TO REJECT. The District reserves the right to reject any and all proposals, make modifications to the work, and waive any informalities or irregularities in proposals as it is deemed in the best interests of the District.

SECTION 10. CONTRACT AWARD. Within fourteen (14) days of receipt of the Notice of Award from the District, the Proposer shall enter into and execute a Contract (engagement letter) with the District.

SECTION 11. LIMITATION OF LIABILITY. Nothing herein shall be construed as or constitute a waiver of Districts limited waiver of liability contained in section 768.28, Florida Statutes, or any other statute or law.

SECTION 12. MISCELLANEOUS. All proposals shall include the following information in addition to any other requirements of the proposal documents.

- A. List position or title of all personnel to perform work on the District audit. Include resumes for each person listed; list years of experience in present position for each party listed and years of related experience.
- B. Describe proposed staffing levels, including resumes with applicable certifications.
- C. Three references from projects of similar size and scope. The Proposer should include information relating to the work it conducted for each reference as well as a name, address and phone number of a contact person.
- D. The lump sum cost of the provision of the services under the proposal.

SECTION 13. PROTESTS. Any protest regarding the Proposal Documents, must be filed in writing, at the offices of the District Manager, within seventy-two (72) hours after the receipt of the proposed project plans and specifications or other contract documents. The formal protest setting forth with particularity the facts and law upon which the protest is based shall be filed within seven (7) calendar days after the initial notice of protest was filed. Failure to timely file a notice of protest or failure to timely file a formal written protest shall constitute a waiver of any right to object or protest with respect to aforesaid plans, specifications or contract documents.

SECTION 14. EVALUATION OF PROPOSALS. The criteria to be used in the evaluation of proposals are presented in the Evaluation Criteria Sheet, contained within the Proposal Documents.

EVALUATION CRITERIA

1. Ability of Personnel. (20 Points)

(E.g., geographic locations of the firm's headquarters or permanent office in relation to the project; capabilities and experience of key personnel; present ability to manage this project; evaluation of existing work load; proposed staffing levels, etc.)

2. Proposer's Experience. (20 Points)

(E.g. past record and experience of the Proposer in similar projects; volume of work previously performed by the firm; past performance for other Community Development Districts in other contracts; character, integrity, reputation, of respondent, etc.)

3. Understanding of Scope of Work. (20 Points)

Extent to which the proposal demonstrates an understanding of the District's needs for the services requested.

4. Ability to Furnish the Required Services. (20 Points)

Extent to which the proposal demonstrates the adequacy of Proposer's financial resources and stability as a business entity necessary to complete the services required (E.g. the existence of any natural disaster plan for business operations).

5 Price (20 Points)

Points will be awarded based upon the price bid for the rendering of the services and reasonable ness of the price to the services.

Total (100 Points)

Blank



Grau & Associates
CERTIFIED PUBLIC ACCOUNTANTS

Proposal to Provide Financial Auditing Services:

SUMMIT VIEW

COMMUNITY DEVELOPMENT DISTRICT

Proposal Due: June 04, 2021
12:00PM

Submitted to:

Summit View
Community Development District
c/o District Manager
12750 Citrus Park Lane, Suite 115
Tampa, FL 33625

Submitted by:

Antonio J. Grau, Partner
Grau & Associates
951 Yamato Road, Suite 280
Boca Raton, Florida 33431

Tel (561) 994-9299
(800) 229-4728

Fax (561) 994-5823

tgrau@graucpa.com

www.graucpa.com



Grau & Associates
CERTIFIED PUBLIC ACCOUNTANTS

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Grau & Associates

CERTIFIED PUBLIC ACCOUNTANTS

June 04, 2021

Summit View Community Development District
c/o District Manager
12750 Citrus Park Lane, Suite 115
Tampa, FL 33625

Re: Request for Proposal for Professional Auditing Services for the fiscal year ended September 30, 2021-2025.

Grau & Associates (Grau) welcomes the opportunity to respond to the Summit View Community District's (the "District") Request for Proposal (RFP), and we look forward to working with you on your audit. We are an energetic and robust team of knowledgeable professionals and are a recognized leader of providing services to Community Development Districts. As one of Florida's few firms to primarily focus on government, we are especially equipped to provide you an effective and efficient audit.

Special district audits are at the core of our practice: **we have a total of 360 clients, 329 or 91% of which are special districts.** We know the specifics of the professional services and work products needed to meet your RFP requirements like no other firm. With this level of experience, we are able to increase efficiency, to provide immediate and continued savings, and to minimize disturbances to client operations.

Why Grau & Associates:

Knowledgeable Audit Team

Grau is proud that the personnel we assign to your audit are some of the most seasoned auditors in the field. Our staff performs governmental engagements year round. When not working on your audit, your team is refining their audit approach for next year's audit. Our engagement partners have decades of experience and take a hands-on approach to our assignments, which all ensures a smoother process for you.

Servicing your Individual Needs

Our clients enjoy personalized service designed to satisfy their unique needs and requirements. Throughout the process of our audit, you will find that we welcome working with you to resolve any issues as swiftly and easily as possible. In addition, due to Grau's very low turnover rate for our industry, you also won't have to worry about retraining your auditors from year to year.

Developing Relationships

We strive to foster mutually beneficial relationships with our clients. We stay in touch year round, updating, collaborating and assisting you in implementing new legislation, rules and standards that affect your organization. We are also available as a sounding board and assist with technical questions.

Maintaining an Impeccable Reputation

We have never been involved in any litigation, proceeding or received any disciplinary action. Additionally, we have never been charged with, or convicted of, a public entity crime of any sort. We are financially stable and have never been involved in any bankruptcy proceedings.

Complying With Standards

Our audit will follow the Auditing Standards of the AICPA, Generally Accepted Government Auditing Standards, issued by the Comptroller General of the United States, and the Rules of the Auditor General of the State of Florida, and any other applicable federal, state and local regulations. We will deliver our reports in accordance with your requirements.

This proposal is a firm and irrevocable offer for 90 days. We certify this proposal is made without previous understanding, agreement or connection either with any previous firms or corporations offering a proposal for the same items. We also certify our proposal is in all respects fair, without outside control, collusion, fraud, or otherwise illegal action, and was prepared in good faith. Only the person(s), company or parties interested in the project as principals are named in the proposal. Grau has no existing or potential conflicts, and anticipates no conflicts during the engagement. Our Federal I.D. number is 20-2067322.

We would be happy to answer any questions or to provide any additional information. We are genuinely excited about the prospect of serving you and establishing a long-term relationship. Please do not hesitate to call or email either of our Partners, Antonio J. Grau, CPA (tgrau@graucpa.com) or Racquel McIntosh, CPA (rmcintosh@graucpa.com) at 561.994.9299. We thank you for considering our firm's qualifications and experience.

Very truly yours,
Grau & Associates



Antonio J. Grau

Firm Qualifications



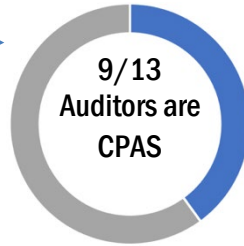
Grau & Associates
CERTIFIED PUBLIC ACCOUNTANTS

Grau's Focus and Experience

Our Team



3 Partners
10 Professional Staff
2 Administrative Professionals



2005

Year founded

Services Provided



Properly registered and licensed professional corporation by the state of FLORIDA

We are proud Members of the **American Institute of Certified Public Accountants** & the **Florida Institute of Certified Public Accountants**

297 Community Development Districts Served

Quality Controls

- ⇒ External quality review program: consistently receives a pass
- ⇒ Internal: ongoing monitoring to maintain quality



AICPA | FICPA | GFOA | FASD | FGFOA

See next page for report and certificate



FICPA Peer Review Program
Administered in Florida
by The Florida Institute of CPAs



Peer Review
Program

AICPA Peer Review Program
Administered in Florida
by the Florida Institute of CPAs

February 20, 2020

Antonio Grau
Grau & Associates
951 Yamato Rd Ste 280
Boca Raton, FL 33431-1809

Dear Antonio Grau:

It is my pleasure to notify you that on February 20, 2020, the Florida Peer Review Committee accepted the report on the most recent System Review of your firm. The due date for your next review is December 31, 2022. This is the date by which all review documents should be completed and submitted to the administering entity.

As you know, the report had a peer review rating of pass. The Committee asked me to convey its congratulations to the firm.

Thank you for your cooperation.

Sincerely,

FICPA Peer Review Committee

Peer Review Team
FICPA Peer Review Committee
paul@ficpa.org
800-342-3197 ext. 251

Florida Institute of CPAs

cc: Daniel Hevia, Racquel McIntosh

Firm Number: 900004390114

Review Number: 571202

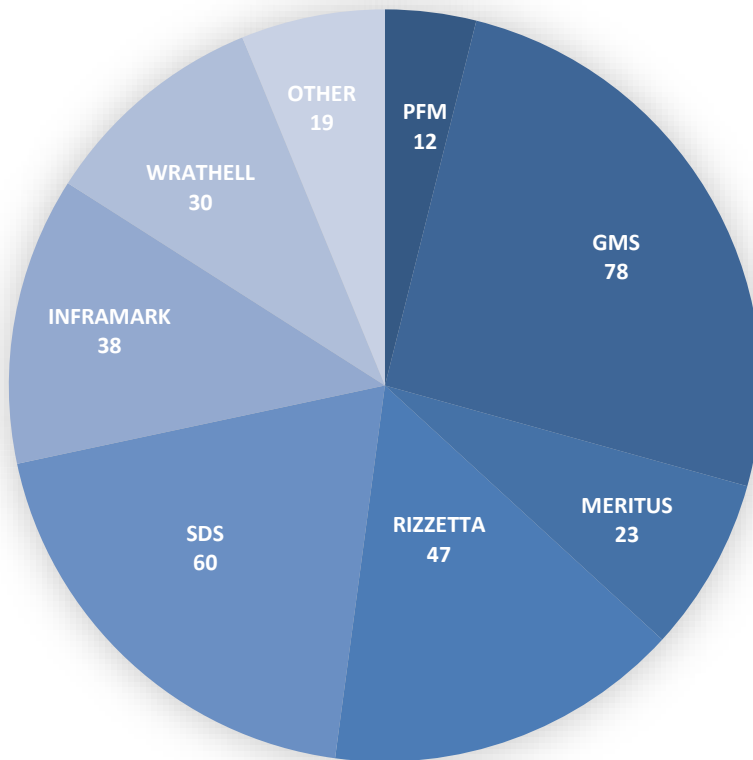
3800 Esplanade Way, Suite 210 | Tallahassee, FL 32311 | 800.342.3197, in Florida | 850.224.2727 | Fax: 850.222.8190 | www.ficpa.org

Firm & Staff Experience



Grau & Associates
CERTIFIED PUBLIC ACCOUNTANTS

GRAU AND ASSOCIATES COMMUNITY DEVELOPMENT DISTRICT EXPERIENCE BY MANAGEMENT COMPANY



Profile Briefs:

Antonio J GRAU, CPA (Partner)

Years Performing Audits: 30+

CPE (last 2 years):

Government

Accounting, Auditing:

24 hours; Accounting,

Auditing and Other:

58 hours

Professional

Memberships: AICPA,

FICPA, FGFOA, GFOA

Racquel McIntosh, CPA (Partner)

Years Performing Audits: 14+

CPE (last 2 years):

Government

Accounting, Auditing:

38 hours; Accounting,

Auditing and Other:

56 hours

Professional

Memberships: AICPA,

FICPA, FGFOA, FASD

"Here at Grau & Associates, staying up to date with the current technological landscape is one of our top priorities. Not only does it provide a more positive experience for our clients, but it also allows us to perform a more effective and efficient audit. With the every changing technology available and utilized by our clients, we are constantly innovating our audit process."

- Tony Grau

"Quality audits and exceptional client service are at the heart of every decision we make. Our clients trust us to deliver a quality audit, adhering to high standards and assisting them with improvements for their organization."

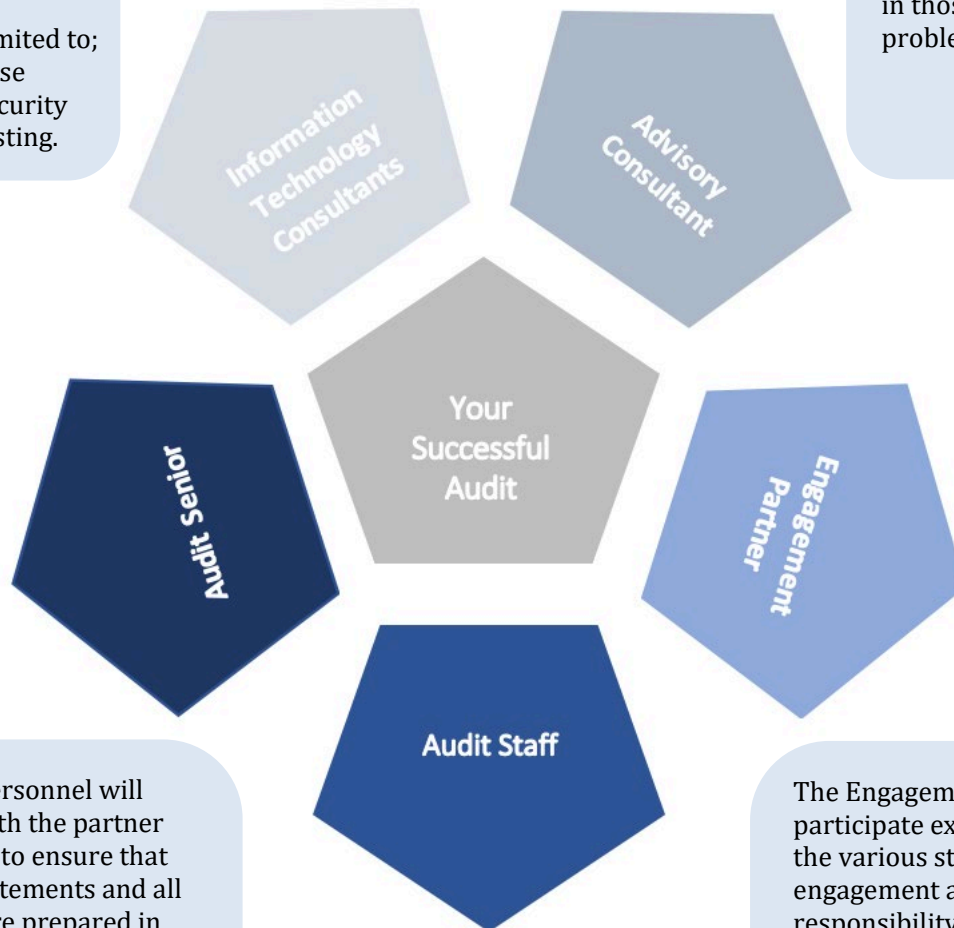
-Racquel McIntosh

YOUR ENGAGEMENT TEAM

Grau's client-specific engagement team is meticulously organized in order to meet the unique needs of each client. Constant communication within our solution team allows for continuity of staff and audit team.

Grau contracts with an outside group of IT management consultants to assist with matters including, but not limited to; network and database security, internet security and vulnerability testing.

An advisory consultant will be available as a sounding board to advise in those areas where problems are encountered.



The assigned personnel will work closely with the partner and the District to ensure that the financial statements and all other reports are prepared in accordance with professional standards and firm policy. Responsibilities will include planning the audit; communicating with the client and the partners the progress of the audit; and determining that financial statements and all reports issued by the firm are accurate, complete and are prepared in accordance with professional standards and firm policy.

The Engagement Partner will participate extensively during the various stages of the engagement and has direct responsibility for engagement policy, direction, supervision, quality control, security, confidentiality of information of the engagement and communication with client personnel. The engagement partner will also be involved directing the development of the overall audit approach and plan; performing an overriding review of work papers and ascertain client satisfaction.



Antonio 'Tony' J. Grau, CPA

Partner

Contact: tgrau@graucpa.com | (561) 939-6672

Experience

For over 30 years, Tony has been providing audit, accounting and consulting services to the firm's governmental, non-profit, employee benefit, overhead and arbitrage clients. He provides guidance to clients regarding complex accounting issues, internal controls and operations.

As a member of the Government Finance Officers Association Special Review Committee, Tony participated in the review process for awarding the GFOA Certificate of Achievement in Financial Reporting. Tony was also the review team leader for the Quality Review of the Office of Management Audits of School Board of Miami-Dade County. Tony received the AICPA advanced level certificate for governmental single audits.

Education

University of South Florida (1983)

Bachelor of Arts

Business Administration

Clients Served (partial list)

(>300) Various Special Districts, including:

Bayside Improvement Community Development District	St. Lucie West Services District
Dunes Community Development District	Ave Maria Stewardship Community District
Fishhawk Community Development District (I,II,IV)	Rivers Edge II Community Development District
Grand Bay at Doral Community Development District	Bartram Park Community Development District
Heritage Harbor North Community Development District	Bay Laurel Center Community Development District
Boca Raton Airport Authority	
Greater Naples Fire Rescue District	
Key Largo Wastewater Treatment District	
Lake Worth Drainage District	
South Indian River Water Control	

Professional Associations/Memberships

American Institute of Certified Public Accountants Florida Government Finance Officers Association
Florida Institute of Certified Public Accountants Government Finance Officers Association Member
City of Boca Raton Financial Advisory Board Member

Professional Education (over the last two years)

<u>Course</u>	<u>Hours</u>
Government Accounting and Auditing	24
Accounting, Auditing and Other	58
Total Hours	<u>82</u> (includes of 4 hours of Ethics CPE)



Racquel C. McIntosh, CPA

Partner

Contact : rmcintosh@graucpa.com | (561) 939-6669

Experience

Racquel has been providing government audit, accounting and advisory services to our clients for over 14 years. She serves as the firm's quality control partner; in this capacity she closely monitors engagement quality ensuring standards are followed and maintained throughout the audit.

Racquel develops in-house training seminars on current government auditing, accounting, and legislative topics and also provides seminars for various government organizations. In addition, she assists clients with implementing new accounting software, legislation, and standards.

Education

Florida Atlantic University (2004)
Master of Accounting
Florida Atlantic University (2003)
Bachelor of Arts:
Finance, Accounting

Clients Served (partial list)

(>300) Various Special Districts, including:

Carlton Lakes Community Development District
Golden Lakes Community Development District
Rivercrest Community Development District
South Fork III Community Development District
TPOST Community Development District

Westchase Community Development District
Monterra Community Development District
Palm Coast Park Community Development District
Long Leaf Community Development District
Watergrass Community Development District

East Central Regional Wastewater Treatment Facilities
Indian Trail Improvement District
Pinellas Park Water Management District
Ranger Drainage District
South Trail Fire Protection and Rescue Service District

Professional Associations/ Memberships

American Institute of Certified Public Accountants
Florida Institute of Certified Public Accountants

FICPA State & Local Government Committee
FGFOA Palm Beach Chapter

Professional Education (over the last two years)

Course

Government Accounting and Auditing
Accounting, Auditing and Other
Total Hours

Hours

38
56
94 (includes of 4 hours of Ethics CPE)

References



Grau & Associates
CERTIFIED PUBLIC ACCOUNTANTS

We have included three references of government engagements that require compliance with laws and regulations, follow fund accounting, and have financing requirements, which we believe are similar to the District.

Dunes Community Development District

Scope of Work	Financial audit
Engagement Partner	Antonio J. Grau
Dates	Annually since 1998
Client Contact	Darrin Mossing, Finance Director 475 W. Town Place, Suite 114 St. Augustine, Florida 32092 904-940-5850

Two Creeks Community Development District

Scope of Work	Financial audit
Engagement Partner	Antonio J. Grau
Dates	Annually since 2007
Client Contact	William Rizzetta, President 3434 Colwell Avenue, Suite 200 Tampa, Florida 33614 813-933-5571

Journey's End Community Development District

Scope of Work	Financial audit
Engagement Partner	Antonio J. Grau
Dates	Annually since 2004
Client Contact	Todd Wodraska, Vice President 2501 A Burns Road Palm Beach Gardens, Florida 33410 561-630-4922

Specific Audit Approach



Grau & Associates
CERTIFIED PUBLIC ACCOUNTANTS

AUDIT APPROACH

Grau's Understanding of Work Product / Scope of Services:

We recognize the District is an important entity and we are confident our firm is eminently qualified to meet the challenges of this engagement and deliver quality audit services. ***You would be a valued client of our firm and we pledge to commit all firm resources to provide the level and quality of services (as described below) which not only meet the requirements set forth in the RFP but will exceed those expectations.*** Grau & Associates fully understands the scope of professional services and work products requested. Our audit will follow the Auditing Standards of the AICPA, *Generally Accepted Government Auditing Standards*, issued by the Comptroller General of the United States, and the Rules of the Auditor General of the State of Florida and any other applicable Federal, State or Local regulations. **We will deliver our reports in accordance with your requirements.**

Proposed segmentation of the engagement

Our approach to the audit engagement is a risk-based approach which integrates the best of traditional auditing techniques and a total systems concept to enable the team to conduct a more efficient and effective audit. The audit will be conducted in three phases, which are as follows:



Phase I - Preliminary Planning

A thorough understanding of your organization, service objectives and operating environment is essential for the development of an audit plan and for an efficient, cost-effective audit. During this phase, we will meet with appropriate personnel to obtain and document our understanding of your operations and service objectives and, at the same time, give you the opportunity to express your expectations with respect to the services that we will provide. Our work effort will be coordinated so that there will be minimal disruption to your staff.

During this phase we will perform the following activities:

- » Review the regulatory, statutory and compliance requirements. This will include a review of applicable federal and state statutes, resolutions, bond documents, contracts, and other agreements;
- » Read minutes of meetings;
- » Review major sources of information such as budgets, organization charts, procedures, manuals, financial systems, and management information systems;
- » Obtain an understanding of fraud detection and prevention systems;
- » Obtain and document an understanding of internal control, including knowledge about the design of relevant policies, procedures, and records, and whether they have been placed in operation;
- » Assess risk and determine what controls we are to rely upon and what tests we are going to perform and perform test of controls;
- » Develop audit programs to incorporate the consideration of financial statement assertions, specific audit objectives, and appropriate audit procedures to achieve the specified objectives;
- » Discuss and resolve any accounting, auditing and reporting matters which have been identified.

Phase II – Execution of Audit Plan

The audit team will complete a major portion of transaction testing and audit requirements during this phase. The procedures performed during this period will enable us to identify any matter that may impact the completion of our work or require the attention of management. Tasks to be performed in Phase II include, but are not limited to the following:

- » Apply analytical procedures to further assist in the determination of the nature, timing, and extent of auditing procedures used to obtain evidential matter for specific account balances or classes of transactions;
- » Perform tests of account balances and transactions through sampling, vouching, confirmation and other analytical procedures; and
- » Perform tests of compliance.

Phase III - Completion and Delivery

In this phase of the audit, we will complete the tasks related to year-end balances and financial reporting. All reports will be reviewed with management before issuance, and the partners will be available to meet and discuss our report and address any questions. Tasks to be performed in Phase III include, but are not limited to the following:

- » Perform final analytical procedures;
- » Review information and make inquiries for subsequent events; and
- » Meeting with Management to discuss preparation of draft financial statements and any potential findings or recommendations.

You should expect more from your accounting firm than a signature in your annual financial report. Our concept of truly responsive professional service emphasizes taking an active interest in the issues of concern to our clients and serving as an effective resource in dealing with those issues. In following this approach, we not only audit financial information with hindsight but also consider the foresight you apply in managing operations.

Application of this approach in developing our management letter is particularly important given the increasing financial pressures and public scrutiny facing today's public officials. We will prepare the management letter at the completion of our final procedures.

In preparing this management letter, we will initially review any draft comments or recommendations with management. In addition, we will take necessary steps to ensure that matters are communicated to those charged with governance.

In addition to communicating any recommendations, we will also communicate the following, if any:

- » Significant audit adjustments;
- » Significant deficiencies or material weaknesses;
- » Disagreements with management; and
- » Difficulties encountered in performing the audit.

Our findings will contain a statement of condition describing the situation and the area that needs strengthening, what should be corrected and why. Our suggestions will withstand the basic tests of corrective action:

Is the recommendation cost effective?

Is the recommendation the simplest to effectuate in order to correct a problem?

Is the recommendation at the heart of the problem and not just correcting a symptomatic matter?

Is the corrective action taking into account why the deficiency occurred?

To assure full agreement with facts and circumstances, we will fully discuss each item with Management prior to the final exit conference. This policy means there will be no “surprises” in the management letter and fosters a professional, cooperative atmosphere.

Communications

We emphasize a continuous, year-round dialogue between the District and our management team. We regularly communicate through personal telephone calls and electronic mail throughout the audit and on a regular basis.

Our clients have the ability to transmit information to us on our secure client portal with the ability to assign different staff with separate log on and viewing capability. This further facilitates efficiency as all assigned users receive electronic mail notification as soon as new information has been posted into the portal.

Cost of Services



Grau & Associates
CERTIFIED PUBLIC ACCOUNTANTS

Our proposed all-inclusive fees for the financial audit for the fiscal years ended September 30, 2021-2025 are as follows:

<u>Year Ended September 30,</u>	<u>Fee</u>
2021	\$3,200
2022	\$3,300
2023	\$3,400
2024	\$3,500
2025	<u>\$3,600</u>
TOTAL (2021-2025)	<u>\$17,000</u>

The above fees are based on the assumption that the District maintains its current level of operations. Should conditions change or additional Bonds are issued the fees would be adjusted accordingly upon approval from all parties concerned.

Supplemental Information



Grau & Associates
CERTIFIED PUBLIC ACCOUNTANTS

PARTIAL LIST OF CLIENTS

SPECIAL DISTRICTS	Governmental Audit	Single Audit	Utility Audit	Current Client	Year End
Boca Raton Airport Authority	✓	✓		✓	9/30
Captain's Key Dependent District	✓			✓	9/30
Central Broward Water Control District	✓			✓	9/30
Collier Mosquito Control District	✓			✓	9/30
Coquina Water Control District	✓			✓	9/30
East Central Regional Wastewater Treatment Facility	✓		✓		9/30
Florida Green Finance Authority	✓				9/30
Greater Boca Raton Beach and Park District	✓			✓	9/30
Greater Naples Fire Control and Rescue District	✓	✓		✓	9/30
Green Corridor P.A.C.E. District	✓			✓	9/30
Hobe-St. Lucie Conservancy District	✓			✓	9/30
Indian River Mosquito Control District	✓				9/30
Indian Trail Improvement District	✓			✓	9/30
Key Largo Waste Water Treatment District	✓	✓	✓	✓	9/30
Lake Padgett Estates Independent District	✓			✓	9/30
Lake Worth Drainage District	✓			✓	9/30
Lealman Special Fire Control District	✓			✓	9/30
Loxahatchee Groves Water Control District	✓				9/30
Old Plantation Control District	✓			✓	9/30
Pal Mar Water Control District	✓			✓	9/30
Pinellas Park Water Management District	✓			✓	9/30
Pine Tree Water Control District (Broward)	✓			✓	9/30
Pinetree Water Control District (Wellington)	✓				9/30
Ranger Drainage District	✓	✓		✓	9/30
Renaissance Improvement District	✓			✓	9/30
San Carlos Park Fire Protection and Rescue Service District	✓			✓	9/30
Sanibel Fire and Rescue District	✓			✓	9/30
South Central Regional Wastewater Treatment and Disposal Board	✓			✓	9/30
South-Dade Venture Development District	✓			✓	9/30
South Indian River Water Control District	✓	✓		✓	9/30
South Trail Fire Protection & Rescue District	✓			✓	9/30
Spring Lake Improvement District	✓			✓	9/30
St. Lucie West Services District	✓		✓	✓	9/30
Sunshine Water Control District	✓			✓	9/30
West Villages Improvement District	✓			✓	9/30
Various Community Development Districts (297)	✓			✓	9/30
TOTAL	333	5	3	328	

ADDITIONAL SERVICES

CONSULTING / MANAGEMENT ADVISORY SERVICES

Grau & Associates also provide a broad range of other management consulting services. Our expertise has been consistently utilized by Governmental and Non-Profit entities throughout Florida. Examples of engagements performed are as follows:

- Accounting systems
- Development of budgets
- Organizational structures
- Financing alternatives
- IT Auditing
- Fixed asset records
- Cost reimbursement
- Indirect cost allocation
- Grant administration and compliance

ARBITRAGE

The federal government has imposed complex rules to restrict the use of tax-exempt financing. Their principal purpose is to eliminate any significant arbitrage incentives in a tax-exempt issue. We have determined the applicability of these requirements and performed the rebate calculations for more than 150 bond issues, including both fixed and variable rate bonds.

73

Current
Arbitrage
Calculations

We look forward to providing Summit View Development District with our resources and experience to accomplish not only those minimum requirements set forth in your Request for Proposal, but to exceed those expectations!

**For even more information on Grau & Associates
please visit us on www.graucpa.com.**

Tab 2

MINUTES OF MEETING

Each person who decides to appeal any decision made by the Board with respect to any matter considered at the meeting is advised that the person may need to ensure that a verbatim record of the proceedings is made, including the testimony and evidence upon which such appeal is to be based.

SUMMIT VIEW COMMUNITY DEVELOPMENT DISTRICT

The regular meeting of the Board of Supervisors of Summit View Community Development District was held on **Friday, May 21, 2021, at 10:10 a.m.** at the office of Rizzetta & Company, Inc., located at 5844 Old Pasco Road, Suite 100, Wesley Chapel, FL 33544.

Present and constituting a quorum were:

Dr. Weiland	Board Supervisor, Chairman
Natalie Feldman	Board Supervisor, Vice Chairman
Pete Williams	Board Supervisor, Assistant Secretary
John Blakley	Board Supervisor, Assistant Secretary

Also present were:

Matthew Huber	Regional District Manager, Rizzetta & Company
Jennifer Kilinski	District Counsel, Hopping, Green & Sams, P.A.
	<i>(via conference call)</i>
Paul Skidmore	Interim District Engineer, Florida Design
	<i>(via conference call)</i>

Audience	None
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FIRST ORDER OF BUSINESS

Call to Order and Roll Call

Mr. Huber called the meeting to order and conducted roll call, confirming that a quorum was present.

SECOND ORDER OF BUSINESS

Audience Comments

Mr. Huber advised for the record that no members of the public were present.

THIRD ORDER OF BUSINESS

Consideration of Minutes of the Board of Supervisors' Meeting held on April 30, 2021

Mr. Huber presented the minutes of the Board of Supervisors' Meeting held on April 30, 2021. There were no changes made to the minutes.

On a Motion by Mr. Williams, seconded by Mr. Blakley, with all in favor, the Board approved the minutes of the Board of Supervisors' meeting held on April 30, 2021 as presented for Summit View Community Development District.

FOURTH ORDER OF BUSINESS

**Consideration of Operation and
Maintenance Expenditures for April
2021**

Mr. Huber presented and reviewed the operation and maintenance expenditures for April 2021.

On a Motion by Mr. Williams, seconded by Mr. Blakely, with all in favor, the Board approved the Operation and Maintenance Expenditures for April 2021(\$0.00) as presented for Summit View Community Development District.

FIFTH ORDER OF BUSINESS

**Consideration of Funding for the
District**

Mr. Huber stated that the District needed additional funding for the operation and maintenance expenditures. A discussion ensued.

Mr. Huber stated that there was an outstanding A/P of \$14,055.72 with a current balance of \$3,600.00. The District has billed \$7,785.00 which is unpaid. The next invoice sent out will be in the amount of \$15,000 to \$20,000.

SIXTH ORDER OF BUSINESS

Public Hearing on Rules of Procedure

Mr. Huber asked for a motion to open the public hearing.

On a Motion by Mr. Williams, seconded by Mr. Blakely, with all in favor, the Board opened the public hearing on Rules of Procedure for Summit View Community Development District.

Ms. Kilinski presented and reviewed the Rules of Procedure. There were no questions or comments. Dr. Weiland discussed construction contracts.

(Mr. Tankel joined the meeting in progress at 10:08 a.m.)

Mr. Huber asked for a motion to close the public hearing.

On a Motion by Mr. Williams, seconded by Mr. Blakely, with all in favor, the Board closed the Public Hearing on Rules of Procedure for Summit View Community Development District.

SEVENTH ORDER OF BUSINESS

**Consideration of Resolution 2021-33,
Adopting Rules of Procedure**

Ms. Kilinski presented and reviewed Resolution 2021-33, Adopting Rules of Procedure.

On a Motion by Mr. Williams, seconded by Mr. Blakely, with all in favor, the Board approved Resolution 2021-33, Adopting Rules of Procedure for Summit View Community Development District.

EIGHTH ORDER OF BUSINESS

**Public Hearing on Fiscal Year
2020/2021 Final Budget**

Mr. Huber asked for a motion to open the public hearing.

On a Motion by Mr. Williams, seconded by Mr. Blakely, with all in favor, the Board opened the public hearing on Fiscal Year 2020/2021 Final Budget for Summit View Community Development District.

Mr. Huber presented and reviewed the fiscal year 2020/2021 final budget. There were no comments or questions.

Mr. Huber asked for a motion to close the public hearing.

On a Motion by Mr. Williams, seconded by Mr. Blakely, with all in favor, the Board closed the Public Hearing on Fiscal Year 2020/2021 Final Budget for Summit View Community Development District.

NINTH ORDER OF BUSINESS

**Consideration of Resolution 2021-34,
Adopting Fiscal Year 2020/2021 Final
Budget**

Mr. Huber presented and reviewed Resolution 2021-34, Adopting Fiscal Year 2020/2021 Final Budget.

On a Motion by Mr. Williams, seconded by Mr. Blakely, with all in favor, the Board approved Resolution 2021-34, Adopting Fiscal Year 2020/2021 Final Budget as presented for Summit View Community Development District.

TENTH ORDER OF BUSINESS

**Presentation of Fiscal Year 2021/2022
Proposed Budget**

Mr. Huber presented and reviewed the Fiscal Year 2021/2022 Proposed Budget. A discussion ensued regarding the line items of the budget.

SUMMIT VIEW COMMUNITY DEVELOPMENT DISTRICT

May 21, 2021 - Minutes of Meeting

Page 4

On a Motion by Mr. Blakley, seconded by Mr. Williams, with all in favor, the Board approved Fiscal Year 2021/2022 Proposed Budget (\$250,000) for Summit View Community Development District.

ELEVENTH ORDER OF BUSINESS

**Consideration of Resolution 2021-35,
Approving Fiscal Year 2021/2022
Proposed Budget and Setting the
Public Hearing on the Final Budget**

Mr. Huber presented and reviewed Resolution 2021-35, Approving Fiscal Year 2021/2022 Proposed Budget and Setting the Public Haring on the Final Budget.

On a Motion by Mr. Williams, seconded by Mr. Blakely, with all in favor, the Board approved Resolution 2021-35, Approving Fiscal Year 2021/2022 Proposed Budget (\$250,000) and Setting the Public Hearing on the Final Budget (August 20, at 10:00 a.m. at the office of Rizzetta, 5844 Old Pasco Road, Suite 100, Wesley Chapel, FL 33544) for Summit View Community Development District.

TWELFTH ORDER OF BUSINESS

**Consideration of Qualifications
Received for District Engineering
Services**

Mr. Huber presented the qualifications received from Florida Design Consultants. He stated that this was the only engineering firm that had submitted qualifications.

On a Motion by Mr. Williams, seconded by Mr. Blakely, with all in favor, the Board approved entering into contract with Florida Design Consultants for the District Engineering Services for Summit View Community Development District.

THIRTEENTH ORDER OF BUSINESS

Staff Reports

A. District Counsel

No report.

B. District Engineer

No report.

C. District Manager

Mr. Huber reminded the Board that the next regular scheduled meeting is June 18, 2021 at 10:00 a.m. The Board discussed the continued meeting scheduled for June 8, 2021 at 10:00 a.m.

FOURTEENTH ORDER OF BUSINESS

**Supervisor Requests and Audience
Comments**

There were no Supervisor requests and no audience members present to comment.

FIFTEENTH ORDER OF BUSINESS

Adjournment

Mr. Huber stated if there was no further business to come before the Board, then a motion to adjourn would be in order.

On a Motion by Mr. Williams, seconded by Mr. Blakley, with all in favor, the Board adjourned the meeting at 10:23 a.m. for Summit View Community Development District.

Secretary/Assistant Secretary

Chairman/ Vice Chairman



Rizzetta & Company

Summit View Community Development District

Master Special Assessment
Allocation Report

12750 Citrus Park Lane
Suite 115
Tampa, FL 33625

rizzetta.com

April 30, 2021

SUMMIT VIEW COMMUNITY DEVELOPMENT DISTRICT
MASTER SPECIAL ASSESSMENT ALLOCATION REPORT

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Rizzetta & Company

I. INTRODUCTION

This Master Special Assessment Allocation Report (the “Master Report”) is being presented in anticipation of financing a capital infrastructure project by the Summit View Community Development District (“District”), a local unit of special purpose government established pursuant to Chapter 190, Florida Statutes. Rizzetta & Company, Incorporated has been retained to prepare a methodology for allocating the special assessments related to the District’s infrastructure project.

The District plans to issue bonds in one or more series to fund a portion of the capital infrastructure project, herein referred as the “Capital Improvement Program”. This Master Report will detail the maximum parameters for the future financing program the District will undertake, as well as determine the manner in which the special assessments will be allocated among all of the land uses within the District that will benefit from the Capital Improvement Program.

II. DEFINED TERMS

“Capital Improvement Program” or “CIP” – Construction and/or acquisition of public infrastructure planned for the District. The total cost for the Capital Improvement Program is estimated to be \$13,435,379.59 as specified in the Revised Engineer’s Report dated May 28, 2021. (**“Master Engineer’s Report”**).

“Developer” – Summit View, LLC.

“District” – Summit View Community Development District.

“District Engineer” – Florida Land Design & Permitting

“End User” – The ultimate purchaser of a fully developed residential unit; typically, a resident homeowner.

“Equivalent Assessment Unit” or “EAU” – Allocation factor which reflects a quantitative measure of the amount of special benefit conferred by the District’s CIP on a particular land use, relative to other land uses.

“Maximum Assessments” – The maximum amount of special assessments to be levied against a parcel in relation to the CIP.

“Platted Units” – Lands configured into their intended end-use and subject to a recorded plat.

“Unplatted Parcels” – Undeveloped lands or parcels that are not yet subject to a recorded plat or their final end-use configuration.



Rizzetta & Company

III. DISTRICT INFORMATION

The Summit View Community Development District was established by the City Commission of Dade City on July 12, 2005, pursuant to City Ordinance No. 2005-0894. The District encompasses approximately 135.35 acres and is located within Dade City and lies entirely in Section 32, Township 24 South, Range 21. The District is approximately 1 mile +/- north of State Road 52 on the east side of Happy Hill Road.

The District plans to issue bonds in one or more series to fund a portion of the Capital Improvement Program, as defined below. This Master Report will detail the maximum parameters for the future financing program the District will undertake, as well as determine the manner in which the special assessments will be allocated among all the landowners that will benefit from the Capital Improvement Program. The current development plan for the District includes approximately 396 residential units.

The District received a favorable bond validation judgment from the Sixth Judicial Circuit of the State of Florida on September 21, 2005, in case No. 51-2005-CA002129 ES, Section B.

Table 1 illustrates the District's preliminary development plan.

IV. CAPITAL IMPROVEMENT PROGRAM

Pursuant to the Master Engineer's Report, the District's Capital Improvement Program includes, but is not limited to, roadway improvements, a stormwater management system, utilities (water and sewer), utility impact fees, hardscape/landscape, undergrounding of electrical conduit, recreational walking trails and professional services, and is estimated to cost \$13,435,379.59 as shown in detail on Table 2. It is expected that the District will issue bonds in one or more series to fund a portion of the CIP, with the balance funded by the Developer or other sources.

V. MASTER ASSESSMENT ALLOCATION – MAXIMUM ASSESSMENTS

Unlike property taxes, which are ad valorem in nature, a special district may levy special assessments pursuant to Chapters 170, 190 and 197, Florida Statutes only if the parcels to be assessed receive special benefit from the infrastructure improvements acquired and/or constructed by the special district. Special benefits act as a logical connection to property from the improvement system or services and facilities being constructed. These special benefits are peculiar to certain assessable lands within the District and differ in nature to those general or incidental benefits that landowners outside the District or the general public may enjoy. A special district must also apportion or allocate its special assessments so that the assessments are fairly and reasonably distributed relative to the special benefit conferred. Generally speaking, this means the amount of special assessment levied on a parcel should not exceed the amount of special benefit received by that parcel. A special district typically may develop and adopt an assessment methodology based on front footage, square footage, or any other reasonable allocation method, so long as the assessment meets the benefit requirement, and so long as the assessments are fairly and reasonably allocated.



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A. Benefit Analysis

Improvements undertaken by the District, as more clearly described in the Master Engineer's Report, create both special benefits and general benefits. The general benefits also inure to the general public at large and are incidental and distinguishable from the special benefits which accrue to the specific property within the boundaries of the District or more precisely defined as the land uses which specifically receive benefit from the CIP as described in this Master Report and supplements thereto.

It is anticipated that the CIP will provide special benefit to all assessable lands within the District. As described in the Master Engineer's Report, "the assessable property within the District will receive a special benefit from the CIP that is at least equal to such costs; and the CIP will function as a system of improvements benefitting all lands within the District."

Valid special assessments under Florida law have two requirements. First, the properties assessed must receive a special benefit from the improvements paid for via the assessments. Second, the assessments must be fairly and reasonably allocated to the properties being assessed. If these two requirements are met, Florida law provides the District's board of supervisors with the ability to use discretion in determining the allocation of the assessments as long as the manner in which the board allocates the assessments is fairly and reasonably determined.

170.201, Florida Statutes, states that the governing body of a municipality may apportion costs of such special assessments based on:

- (a) The front or square footage of each parcel of land; or
- (b) An alternative methodology, so long as the amount of the assessment for each parcel of land is not in excess of the proportional benefits as compared to other assessments on other parcels of land.

Based on evaluation of the Master Engineer's Report, and in consultation with the Developer regarding the CIP, and by resolution of the Board of Supervisors, it has been determined that the manner in which the governing body of the District believes it is in the District's best interest to allocate the assessments for the bonds to be issued by the District is to be based on the front footage of each Platted Unit. This method of EAU allocation meets statutory requirements and is generally accepted in the industry.

Table 3 demonstrates the allocation of the estimated costs allocated to the various planned unit types. The costs are allocated using EAU factors, which have the effect of stratifying the costs based on land use and front footage. These EAU factors, which utilize a 50' lot frontage as the standard lot size, are provided on Table 3. As described further herein, and based in part on the report of the District Engineer, it is our professional opinion that the Maximum Assessments are supported by sufficient benefit from the CIP, and that the Maximum Assessments are fairly and reasonably allocated to all assessable properties subject to the Maximum Assessments.



B. Anticipated Bond Issuance

As described above, it is expected that the District will issue bonds in one or more series to fund a portion of the CIP. Notwithstanding the description of the Maximum Assessments below, landowners will not have a payment obligation until the issuance of bonds, at which time the fixed assessment amounts securing those bonds, as well as a collection protocol, will be determined. Please note that the preceding statement only applies to capital assessments and shall have no effect on the ability of the District to levy maintenance special assessments and collect payments related to the operations and maintenance of the District.

A maximum bond sizing is included in Table 4 of this report. This maximum bond amount has been calculated using conservative financing assumptions and represents a scenario in which the entire portion of the CIP is funded with bond proceeds. However, the District is not obligated to issue bonds at this time, is not obligated to finance the total CIP, and similarly may choose to issue bonds in an amount lower than the maximum amount, which is expected. Furthermore, the District may issue bonds in various par amounts, maturities and structures up to the maximum principal amount. Table 5 represents the Maximum Assessments necessary to support repayment of the maximum bonds.

C. Maximum Assessment Methodology

Initially, the District will be imposing a Maximum Assessment lien based on the maximum benefit conferred on each parcel by the CIP. Accordingly, Table 6 reflects the Maximum Assessment per Platted Unit. Because the District may issue bonds in various par amounts, maturities and structures, the special assessments necessary to secure repayment of those bonds will not exceed the amounts on Table 6. It is expected that the standard long-term special assessments levied against the assessable property owners within the District will be lower than the amounts in Table 6 and will reflect assessment levels which conform with the current market.

All of the lands within the District that will be subject to the Maximum Assessments at the time of this Report are Unplatted Parcels. Assessments will be initially levied on these Unplatted Parcels on an equal assessment per acre basis. At the time parcels are platted or otherwise subdivided into Platted Units, individual Maximum Assessments will be assigned to those Platted Units at the per-unit amounts described in Table 6, thereby reducing the Maximum Assessments encumbering the Unplatted Parcels by a corresponding amount. Any unassigned amount of Maximum Assessments encumbering the remaining Unplatted Parcels will continue to be calculated and levied on an equal assessment per acre basis.

Until all the land within the District has been platted and sold, the assessments on the portion of the land that has not been platted and sold are not fixed and determinable. The reasons for this are (1) until the lands are platted, the number of developable acres within each tract against which the assessments are levied is not determined; (2) the lands are subject to re-plat, which may result in changes in



development density and product type; (3) until the lands are sold, it is unclear of the timing of the absorptions. Only after the property has been platted and sold will the developable acreage be determined, the final plat be certain, the developable density known, the product types be confirmed, and the timing of the sales solidified.

This Master Report is intended to establish, without the need for a further public hearing, the necessary benefit and fair and reasonable allocation findings for a master assessment lien, which may give rise to one or more individual assessment liens relating to individual bond issuances necessary to fund all or a portion of the CIP referenced herein. All such liens shall be within the benefit limits established herein and using the allocation methodology described herein, and shall be described in one or more supplemental reports.

In the event an Unplatted Parcel is sold to a third party not affiliated with the Developer, Maximum Assessments will be assigned to the Unplatted Parcel based on the maximum total number of Platted Units assigned by the Developer to that Unplatted Parcel, subject to review by the District's methodology consultant to ensure that any such assignment is reasonable, supported by current development rights and plans, and otherwise consistent with the methodology in this Master Report. The owner of the Unplatted Parcel will be responsible for the total assessments applicable to the Unplatted Parcel, regardless of the total number of Platted Units ultimately actually platted. These total assessments are fixed to the Unplatted Parcel at the time of the sale. If the Transferred Property is subsequently sub-divided into smaller parcels, the total assessments initially allocated to the Unplatted Parcel will be re-allocated to the smaller parcels pursuant to the methodology as described herein (i.e., equal assessment per acre until platting).

As set forth in any supplemental report, and for any particular bond issuance, the Developer may opt to "buy down" the assessments on particular product types and/or lands using a contribution of cash, infrastructure or other consideration, in order for assessments to be at certain target levels. Note that any "true-up," as described herein, may require a payment to satisfy "true-up" obligations as well as additional contributions to achieve such target assessment levels. Any amounts contributed by the Developer to pay down assessments will not be eligible for "deferred costs," if any are provided for in connection with any particular bond issuance.

In the event that the CIP is not completed, required contributions are not made, additional benefitted lands are added to the District and/or assessment area(s), or under certain other circumstances, the District may elect to reallocate the special assessments, and the District expressly reserves the right to do so, provided however that any such reallocation shall not be construed to relieve any party of contractual or other obligations to the District.



D. True-Up Determination & Payments

This Master Report identifies the amount of equivalent assessment units (and/or product types and unit counts) planned for the lands within the District. At such time as lands are to be platted (or re-platted) or site plans are to be approved (or re-approved), the plat or site plan (either, herein, "Proposed Plat") shall be presented to the District for review pursuant to the terms herein. Such review shall be limited solely to the function and the enforcement of the District's assessment liens and/or true-up agreements. Nothing herein shall in any way operate to or be construed as providing any other plat approval or disapproval powers to the District. If such Proposed Plat is consistent with the development plan as identified herein, the District shall allocate the assessments to the product types being platted on a first platted, first assigned basis and the remaining property in accordance with this Master Report and cause the assessments to be recorded in the District's Improvement Lien Book. If a change in development shows a net increase in the overall principal amount of assessments able to be assigned to the assessable property within the District, then the District may undertake a pro rata reduction of assessments for all assessed properties within the District, or may otherwise address such net increase as permitted by law.

However, if a change in development as reflected in a Proposed Plat results in a net decrease in the overall principal amount of assessments able to be assigned to the planned units described in this Master Report, including any designated assessment area, then the District shall require the landowner(s) of the lands encompassed by the Proposed Plat to pay a "True-Up Payment" equal to the shortfall in assessments resulting from the reduction of planned units. Any True-Up Payment shall become due and payable that tax year by the landowner of the lands subject to the Proposed Plat, shall be in addition to the regular assessment installment payable for such lands, and shall constitute part of the debt assessment liens imposed against the Proposed Plat property until paid. A True-Up Payment shall include any applicable accrued interest pursuant to the applicable assessment resolutions of the District. For further detail on the true-up process, please refer to the applicable agreement and applicable assessment resolution(s).

VI. ADDITIONAL STIPULATIONS

Certain financing, development, and engineering data was provided by members of District staff and/or the Developer. The allocation methodology described herein was based on information provided by those professionals. Rizzetta & Company, Incorporated makes no representations regarding said information transactions beyond restatement of the factual information necessary for compilation of this report.

Rizzetta & Company, Incorporated, does not represent the District as a Municipal Advisor or Securities Broker nor is Rizzetta & Company, Incorporated, registered to provide such services as described in Section 15B of the Securities and Exchange Act of 1934, as amended. Similarly, Rizzetta & Company, Inc., does not provide the District with financial advisory services or offer investment advice in any form.



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EXHIBIT A:

ALLOCATION METHODOLOGY



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**SUMMIT VIEW
COMMUNITY DEVELOPMENT DISTRICT
MASTER SPECIAL ASSESSMENT ALLOCATION REPORT**

TABLE 1: CURRENT DEVELOPMENT PLAN

PRODUCTS	EAU	Sub-Phase 1	Sub-Phase 2	TOTAL UNITS (1)
Single Family 40'	0.80	82	6	88
Single Family 50'	1.00	72	156	228
Single Family 60'	1.20	31	49	80
TOTAL:		185	211	396

(1) Product totals are shown for illustrative purposes and not fixed per product type. Development plan is subject to change with land platting.

**SUMMIT VIEW
COMMUNITY DEVELOPMENT DISTRICT
MASTER SPECIAL ASSESSMENT ALLOCATION REPORT**

TABLE 2: TOTAL CIP COST DETAIL

DESCRIPTION	TOTAL ESTIMATED COST
Roadways	\$2,267,093.19
Stormwater Management	\$4,861,314.33
Utilities (Water and Sewer)	\$2,390,913.92
Utilities Impact Fees	\$2,084,544.00
Hardscape/Landscape	\$170,000.00
Differential Cost of Undergrounding of Conduit	\$110,075.00
Recreational Amenities Walking Trails	\$100,000.00
Professional Services	\$378,405.00
Off-Site Master Improvements	\$433,254.17
Contingency (5%)	\$639,779.98
Total CIP Construction Costs	<u>\$13,435,379.59</u>

NOTE: Infrastructure cost estimates provided by the District Engineer.

**SUMMIT VIEW
COMMUNITY DEVELOPMENT DISTRICT
MASTER SPECIAL ASSESSMENT ALLOCATION REPORT**

TABLE 3: TOTAL CIP COST/BENEFIT ALLOCATION

PRODUCTS	EAU FACTOR	UNITS	TOTAL EAU	% of EAU	TOTAL COST (1)	PER UNIT COST
Single Family 40'	0.80	88	70.40	17.85%	\$2,398,202	\$27,252
Single Family 50'	1.00	228	228.00	57.81%	\$7,766,903	\$34,065
Single Family 60'	1.20	80	96.00	24.34%	\$3,270,275	\$40,878
		396	394.40	100.00%	\$13,435,380	

(1) Total costs shown for illustrative purposes and are not fixed per product type.

**SUMMIT VIEW
COMMUNITY DEVELOPMENT DISTRICT
MASTER SPECIAL ASSESSMENT ALLOCATION REPORT**

TABLE 4: FINANCING INFORMATION - MAXIMUM BONDS

Estimated Coupon Rate	5.000%
Maximum Annual Debt Service ("MADS")	\$1,084,407
SOURCES:	
ESTIMATED PRINCIPAL AMOUNT	\$16,670,000 (1)
Total Net Proceeds	\$16,670,000
USES:	
Construction Account	(\$13,435,380)
Debt Service Reserve Fund	(\$1,084,407)
Capitalized Interest (24 months)	(\$1,667,000)
Costs of Issuance	(\$149,813)
Underwriter's Discount	(\$333,400)
Total Uses	(\$16,670,000)

(1) The District is not obligated to issue this amount of bonds.

TABLE 5: FINANCING INFORMATION - MAXIMUM ASSESSMENTS

Estimated Interest Rate	5.000%
Maximum Initial Principal Amount	\$16,670,000
Aggregate Annual Installment	\$1,084,407 (1)
Estimated County Collection Costs	2.00% \$23,072 (2)
Maximum Early Payment Discounts	4.00% \$46,145 (2)
Estimated Total Annual Installment	\$1,153,625

(1) Based on MADS for the Maximum Bonds.

(2) May vary as provided by law.

**SUMMIT VIEW
COMMUNITY DEVELOPMENT DISTRICT
MASTER SPECIAL ASSESSMENT ALLOCATION REPORT**

TABLE 6: ASSESSMENT ALLOCATION - MAXIMUM ASSESSMENTS (1)

PRODUCT	UNITS	EAU FACTOR	PRODUCT TOTAL PRINCIPAL (2)	PER UNIT PRINCIPAL	PRODUCT ANNUAL INSTLMT. (2)(3)	PER UNIT ANNUAL INSTLMT. (3)
Single Family 40'	88	0.80	\$2,975,578	\$33,813	\$205,921	\$2,340
Single Family 50'	228	1.00	\$9,636,815	\$42,267	\$666,903	\$2,925
Single Family 60'	80	1.20	\$4,057,606	\$50,720	\$280,801	\$3,510
TOTAL	396		\$16,670,000		\$1,153,625	

(1) Represents maximum assessments based on total CIP and allocated by EAU. Actual imposed amounts may be lower.

(2) Product total shown for illustrative purposes only and are not fixed per product type.

(3) Includes estimated Pasco County collection costs/payment discounts, which may fluctuate.

**SUMMIT VIEW COMMUNITY DEVELOPMENT DISTRICT
MAXIMUM ASSESSMENT LIEN ROLL (1)**

PARCEL ID NO.	ACREAGE	MAXIMUM PRINCIPAL/ACRE	MAXIMUM ANNUAL INSTALLMENT/ACRE⁽¹⁾
See attached legal description	1	\$123,162.17	\$8,523.27
<hr/>			
Total:		135.35	\$16,670,000
			\$1,153,625

(1) The allocation of the maximum assessment lien applied to each parcel above is based on units determined by the gross acreage of the parcel. As described in the Master Special Assessment Allocation Report, as parcels are platted, the assessments will be allocated in accordance with the allocation methodology described in the Report.

LEGAL DESCRIPTION

THE SOUTH 1/2 OF THE SOUTHWEST 1/4 OF THE NORTHEAST 1/4; THE NORTHEAST 1/4 OF THE NORTHWEST 1/4 OF THE SOUTHEAST 1/4; THE NORTHWEST 1/4 OF THE NORTHWEST 1/4 OF THE SOUTHEAST 1/4; THE SOUTHWEST 1/4 OF THE NORTHWEST 1/4 OF THE SOUTHEAST 1/4, AND THE NORTH 1/2 OF THE NORTHWEST 1/4 OF THE SOUTHWEST 1/4 OF THE SOUTHEAST 1/4; THE NORTHEAST 1/4 OF THE SOUTHWEST 1/4; THE NORTH 1/4 OF THE SOUTHEAST 1/4 OF THE SOUTHWEST 1/4; THE NORTHEAST 1/4 OF THE NORTHWEST 1/4 OF THE SOUTHWEST 1/4, AND THE SOUTH 1/2 OF THE NORTHWEST 1/4 OF THE SOUTHWEST 1/4 ALL IN SECTION 32, TOWNSHIP 24 SOUTH, RANGE 21 EAST, ALL OF SAID PROPERTY BEING SITUATE IN PASCO COUNTY, FLORIDA.

SUBJECT TO ALL RIGHTS OF WAY FOR ROADS

AMENDED AND RESTATED
MASTER ENGINEER'S REPORT
FOR THE
SUMMIT VIEW COMMUNITY DEVELOPMENT DISTRICT
13350 HAPPY HILL ROAD, DADE CITY, FL 33525

PREPARED FOR:

BOARD OF SUPERVISORS
SUMMIT VIEW COMMUNITY DEVELOPMENT DISTRICT

ENGINEER:

Florida Land Design & Permitting
3030 Starkey Boulevard
Trinity, Florida 34655

June 2, 2021

SUMMIT VIEW COMMUNITY DEVELOPMENT DISTRICT
AMENDED AND RESTATED MASTER ENGINEER'S REPORT

1. INTRODUCTION

The purpose of this report is to provide a description of the capital improvement plan (“**CIP**”), and estimated costs of the CIP (as set forth in Appendix A hereto), for the Summit View Community Development District (“**District**” or “**CDD**”). The District was established on July 12, 2005 by the City Commission of the City of Dade City, pursuant to Ordinance 2005-0894. The Developer of the project within the District is Summit View LLC (the “**Developer**”), who is the current sole owner of the land of the District (Exhibit A below).

The CIP, as described herein, contains improvements that are within the scope of the “Projects” defined in the Final Judgment entered on September 21, 2005 by the Circuit Court of the Sixth Judicial Circuit in *Summit View Community Development District v. The State of Florida, et al.*, Case No. 51-2005-CA002129 ES, Section B.

2. GENERAL SITE DESCRIPTION

The site is 135.35 acres located within the City of Dade City (the “City”) and lies entirely in Section 32, Township 24 South, Range 21. The site is approximately 1 mile +/- north of State Road 52 on the east side of Happy Hill Road. The project consists of 396 single-family residential units, 59.31 acres of Residential Development, 21.75 acres of District Roads, 3.24 acres of Recreational Facilities, and 51.05 acres of Storm Management Ponds and Open Space.

As noted in **Exhibit A**, the District’s boundaries include approximately 135.35 acres of land located in the City.

3. PROPOSED PROJECT

The CIP is intended to provide public infrastructure improvements for the lands within the District, which lands are planned for 396 single-family residential units. The CIP is intended to function as one system of improvements, with costs of the CIP being broken out into Master, Sub-Phase 1 or Sub-Phase 2 costs, as illustrated in Appendix A attached hereto.

The proposed site plan for the District is attached as **Exhibit B** to this report, and the plan enumerates the proposed lot count, by type. A legal description is attached hereto as **Exhibit C**.

The following charts show the planned product types and land uses for the District:

PRODUCT TYPES

40-foot-wide x 110’ deep (Min.) Product:	88 Units
50-foot-wide x 110’ deep (Min.) Product:	228 Units
60-foot-wide x 110’ deep (Min.) Product:	80 Units

LAND USE

Residential Area:	59.31 acres
District Right-of way:	21.75 acres
Stormwater Management Ponds and Open Space:	51.05 acres
Recreational Facilities:	3.24 acres

The CIP the following infrastructure categories:

Roadway Improvements:

The CIP includes subdivision roads within the District. Generally, all roads will be 2-lane un-divided roads with periodic roundabouts. Such roads include the roadway asphalt, base, and subgrade, roadway curb and gutter, striping and signage and sidewalks within rights-of-way abutting non-lot lands. Sidewalks abutting lots will be constructed by the homebuilders owned and maintained by the CDD. All roads will be designed in accordance with City standards.

All internal roadways may be financed by the District, and dedicated to the District for ownership, operation, and maintenance. All internal roadways will be open to the public.

No Impact Fee Credits are available for roadway improvements.

Stormwater Management System:

The stormwater collection and outfall system are a combination of roadway curbs, curb inlets, pipe, control structures and open ponds designed to treat and attenuate stormwater runoff from District lands. The stormwater system within the project discharges to on site retention ponds. The stormwater system will be designed consistent with the criteria established by the SWFWMD and the City for stormwater/floodplain management systems. The District will finance, own, operate and maintain the stormwater system, including inlets and storm sewer systems within the right-of-way. A portion of the stormwater improvements were constructed in 2018 by the Developer and are being acquired by the District.

NOTE: No private earthwork is included in the CIP and the District will not fund any cost of placing fill on, or mass grading of, private lots.

Water and Wastewater Utilities:

As part of the CIP, the District intends to construct and/or acquire water and wastewater infrastructure. In particular, the on-site water supply improvements include water mains that will be located within rights-of-way and used for potable water service and fire protection. Water main connections will be made along Happy Hill Road just north of the intersection of Winding Hills Loop.

Wastewater improvements for the project will include an onsite 8" diameter gravity collection system, offsite and onsite 6" Forcemain and onsite lift stations. The offsite Forcemain connection will be made at Janke Drive and State Road 52.

The water and wastewater collection systems for all phases will be completed by the District and then dedicated to the City for operation and maintenance.

Impact Fees in connection with the water and wastewater utility improvements are as follows: The current rate for the water impact fee is \$1,321 per unit. The current rate for the wastewater impact fee is \$3,943 per unit. Therefore, the total charge per unit for the water and wastewater impact fees is \$5,264 per unit. The District will pay a sewer capacity reservation fee for the entire community which is equal to 50% of the total impact fee prior to the recording of the first plat, or at least \$1,060,696.00.

There are impact fee credits for the sewer capacity reservation fee. The Developer is retaining these impact fee credits. In exchange, the Developer would be required to pay back the capacity reservation fee upon the closing of each residential unit.

Hardscape and Landscape:

The District will construct and/or install landscaping and hardscaping within District common areas and rights-of-way. The hardscaping will consist of entry features and landscaping.

Installation, operation, and maintenance of any irrigation system will be the responsibility of the Homeowner's Association.

The City has distinct design criteria requirements for planting design. Therefore, this project will at a minimum meet those requirements but, in most cases, exceed the requirements with enhancements for the benefit of the community.

All such landscaping and hardscaping will be owned, maintained, and funded by the District. Such infrastructure shall be within the rights-of-way owned by the CDD, and maintained by the CDD in order to be funded by the CDD.

Undergrounding of Electrical Utility Lines

The CIP does however include the undergrounding of electrical utility lines within right-of-way utility easements throughout the community, which is a requirement within the City. Any lines and transformers located in such areas would be owned by Tampa Electric Company and not paid for by the District as part of the CIP.

Recreational Amenities:

In conjunction with the construction of the CIP, the District intends to construct walking trails throughout the District.

The District is not anticipated to finance additional amenities, parks, and other common areas for the benefit of the District ("Non CDD Amenity Improvements"). These Non CDD Amenity Improvements will be funded and, are anticipated to be owned, by the homeowners' association for ownership, operation, and maintenance.

Professional Services

The CIP also includes various professional services. These include: (i) engineering, surveying, architectural and legal fees associated with the CIP, (ii) permitting and plan review costs, and (iii) development/construction management services fees that are required for the design, permitting, construction, and maintenance acceptance of the public improvements and community facilities.

Off-Site Improvements

All roadway, water, wastewater, and stormwater system components associated with the improvements along Happy Hill Road and Roth Lane are considered off-site improvements and are included within this category of improvement expected to be financed by the District.

As noted, the District's CIP functions as a system of improvements benefitting all lands within the District.

All the foregoing offsite improvements are required by applicable development approvals. Note that, there are no direct impact fee or similar credits available from the construction of any off-site roadway or stormwater improvements. A contingent reimbursable credit for future third party connections to the constructed off-site water and wastewater lines of \$613.00 per unit will be retained by Developer.

The following table shows who will finance, own and operate the various improvements of the CIP:

TABLE A

<u>Facility Description</u>	<u>Ownership</u>	<u>O&M Entity</u>
Roadways	CDD	CDD
Stormwater Management	CDD	CDD
Utilities (Water and Sewer)	City	City
Hardscape/Landscape	CDD	CDD
Undergrounding of Conduit	CDD	CDD
Off-Site Improvements	City	City

4. PERMITTING/CONSTRUCTION COMMENCEMENT

All necessary permits for the construction of the CIP have either been obtained or are currently under review by respective governmental authorities, and include the following:

	<u>Approved</u>	<u>Expiration</u>
Dade City Zoning Ordinance No.: 2020-23	December 8, 2020	n/a
Dade City Land Use Ord. 2005-0888	October 25, 2005	n/a
Dade City PUD Rezoning Ord. 2005-0905 Amended	January 10, 2006 Dec. 8, 2021	PD-H1 n/a
Dade City Prel. Dev. Plan 03.16.2005	August 31, 2018	n/a
Dade City Mass Grading Plan 11.14.2007	August 31, 2018	same as SWFWMD
Dade City Phase 2B Final Subdivision Plat	Pending	

Dade City Ph. I & II Const. Plans 11.14.2007	confirmed	N/A
As revised by plans to be submitted by March 5, 2021.		
Dade City Offsite Utilities	Sept. 2018	n/a
Pasco R/W Exist. 01.11.2006 12.20.2007	Aug 19, 2014	n/a
SWFWMD ERP 44030817.000 Mining	September 16, 2006	September 19, 2011
SWFWMD ERP 44030817.007 (Ext of .000)	August 28, 2014	August 28, 2019
44030817.016 (Ext of .007)	June 27, 2019	Jan. 25, 2022
44030817.025 (Ext of .016)	Jan. 16, 2020	Aug. 16, 2022
SWFWMD ERP 44030817.002 Letter Mod	December 4, 2006	December 4, 2011
SWFWMD ERP 44030817.003 Phase 2	August 23, 2007	August 23, 2012
SWFWMD ERP 44030817.004 Phase 1	August 23, 2007	August 23, 2012
SWFWMD ERP 44030817.008 (Ext of .002)	August 28, 2014	August 28, 2019
44030817.017 (Ext of .008)	June 27, 2019	Jan. 25, 2022
44030817.026 (Ext of .017)	Jan. 16, 2020	Aug. 16, 2022
SWFWMD ERP 44030817.006 Letter Mod	May 6, 2009	September 19, 2011
SWFWMD ERP 44030817.011 (Ext of .006)	August 28, 2014	August 28, 2019
44030817.019 (Ext of .011)	June 27, 2019	Jan. 25, 2022
SWFWMD ERP 44030817.009 (Ext of .003)	August 28, 2014	August 28, 2019
44030817.020 (Ext of .009)	June 27, 2019	Jan. 25, 2022
44030817.024 (Ext of .020)	Jan 16, 2020	Aug. 16, 2022
SWFWMD ERP 44030817.010 (Ext of .004)	August 28, 2014	August 28, 2019
44030817.021 (Ext of .010)	June 27, 2019	Jan. 25, 2022
44030817.023 (Ext of .021)	Jan. 16, 2020	Aug, 16, 2022
SWFWMD ERP 44030817.018	June 27, 2019	March 9, 2023
SWFWMD WUP 20001194.003	May 14, 2018	May 14, 2028
FDEP NOI NPDES Phase II	July 11, 2018	July 11, 2023
FDEP NOI NPDES Phase I	September 29, 2018	September 28, 2023
FDEP Water	October 19, 2018	October 18, 2023
FDEP Wastewater	Nov. 30, 2018	Nov. 29, 2023

5. OPINION OF PROBABLE CONSTRUCTION COSTS

Table A shown below presents, among other things, the Opinion of Probable Cost for the CIP. It is our professional opinion that the costs set forth in Table A are reasonable and consistent with market pricing.

TABLE A

<u>Facility Description</u>	<u>Total CIP Costs</u>
Roadways	\$2,267,093.19
Stormwater Management	\$4,861,314.33
Utilities (Water and Sewer)	\$2,390,913.92
Utilities Commitment/Impact Fees	\$2,084,544.00
Hardscape/Landscape	\$170,000.00
Undergrounding of Conduit	\$110,075.00
Recreational Amenities Walking Trails	\$100,000.00
Professional Services	\$1,242,405.00
Off-Site Improvements	\$433,254.17
Contingency (5%)	\$682,979.98
TOTAL	\$14,342,579.59

* The probable costs estimated herein do not include anticipated carrying cost, interest reserves or other anticipated CDD expenditures that may be incurred.

6. CONCLUSIONS

The CIP will be designed in accordance with current governmental regulations and requirements. The CIP will serve its intended function so long as the construction is in substantial compliance with the design.

It is further our opinion that:

- The estimated cost of the CIP as set forth herein is reasonable based on prices currently being experienced in Pasco County, Florida, and is not greater than the lesser of the actual cost of construction or the fair market value of such infrastructure;
- All of the improvements comprising the CIP are required by applicable development approvals;
- The CIP is feasible to construct, there are no technical reasons existing at this time that would prevent the implementation of the CIP, and it is reasonable to assume that all necessary regulatory approvals will be obtained in due course;
- The reasonably expected economic life of the CIP is anticipated to be at least 20+ years;
- The assessable property within the District will receive a special benefit from the CIP that is at least equal to such costs; and
- The CIP will function as a system of improvements benefitting all lands within the District.

The professional service for establishing the Construction Cost Estimate is consistent with the degree of care and skill exercised by members of the same profession under similar circumstances.

The CIP will be owned by the District or other governmental units and such CIP is intended to be available and will reasonably be available for use by the general public (either by being part of a system of improvements that is available to the general public or is otherwise available to the general public) including nonresidents of the District. All the CIP is or will be located on lands owned or to be owned by the District or another governmental entity or on public easements in favor of the District or other governmental entity. The CIP, and any cost estimates set forth herein, do not include any earthwork, grading or other improvements on private lots or property. Regarding any fill generated by construction of the CIP, and that is not used as part of the CIP, such fill will only be placed on-site at the expense of the Developer.

Please note that the CIP as presented herein is based on current plans and market conditions which are subject to change. Accordingly, the CIP, as used herein, refers to sufficient public infrastructure of the kinds described herein (i.e., stormwater/floodplain management, sanitary sewer, potable water, etc.) to support the development and sale of the planned residential units in the District, which (subject to true-up determinations) number and type of units may be changed with the development of the site. Stated differently, during development and implementation of the public infrastructure improvements as described for the District, it may be necessary to make modifications and/or deviations for the plans, and the District expressly reserves the right to do so.

Paul E. Skidmore, P.E.

Date

FL License No. 39631

APPENDIX
Cost Breakdown

<u>Infrastructure</u>	<u>Master</u>	<u>Sub-Phase 1</u>	<u>Sub-Phase 2</u>	<u>Total CIP</u>
Roadways	\$532,439.00	\$783,520.29	\$951,133.90	\$2,267,093.19
Stormwater Management	\$122,497.00	\$2,528,686.05	\$2,210,131.28	\$4,861,314.33
Utilities (Water and Sewer)	\$435,659.00	\$760,071.14	\$1,195,183.78	\$2,390,913.92
Utilities Commitment/Impact Fees	\$1,042,272.00	\$0.00	\$1,042,272.00	\$2,084,544.00
Hardscape/Landscape	\$0.00	\$83,300.00	\$86,700.00	\$170,000.00
Undergrounding of Conduit	\$0.00	\$52,800.00	\$57,275.00	\$110,075.00
Recreational Amenities, Walking Trails	\$0.00	\$49,000.00	\$51,000.00	\$100,000.00
Professional Services*	\$1,242,405.00	\$0.00	\$0.00	\$1,242,405.00
Offsite Improvements	\$433,254.17	\$0.00	\$0.00	\$433,254.17
Contingency	\$0.00	\$319,068.93	\$363,911.00	\$682,979.98
TOTAL	\$3,808,526.17	\$4,576,446.41	\$5,957,606.96	\$14,342,579.59

Product Type:	<u>Sub-Phase 1</u>	<u>Sub-Phase 2</u>
40-foot-wide x 110' deep (Min.) Product:	82 Units	6 Units
50-foot-wide x 110' deep (Min.) Product:	72 Units	156 Units
60-foot-wide x 110' deep (Min.) Product:	31 Units	49 Units
Total:	185 Units	211 Units

* All Master Costs occur at the timing of Sub Phase 1 except for the \$293,830.00 which is timed to occur during Sub Phase 2 and is included in the total in the above Professional Fees.

EXHIBIT “A”

**SECTION 32, TOWNSHIP 24 SOUTH, RANGE 21 EAST
DADE CITY, PASCO COUNTY, FLORIDA**

LEGAL DESCRIPTION: (PER COMMITMENT)

THE SOUTH 1/2 OF THE SOUTHWEST 1/4 OF THE NORTHEAST 1/4; THE NORTHEAST 1/4 OF THE NORTHWEST 1/4 OF THE SOUTHEAST 1/4; THE NORTHWEST 1/4 OF THE NORTHWEST 1/4 OF THE SOUTHEAST 1/4; THE SOUTHWEST 1/4 OF THE NORTHWEST 1/4 OF THE SOUTHEAST 1/4, AND THE NORTH 1/2 OF THE NORTHWEST 1/4 OF THE SOUTHWEST 1/4 OF THE SOUTHEAST 1/4; THE NORTHEAST 1/4 OF THE SOUTHWEST 1/4; THE NORTH 1/4 OF THE SOUTHEAST 1/4 OF THE SOUTHWEST 1/4; THE NORTHEAST 1/4 OF THE NORTHWEST 1/4 OF THE SOUTHWEST 1/4, AND THE SOUTH 1/2 OF THE NORTHWEST 1/4 OF THE SOUTHWEST 1/4 ALL IN SECTION 32, TOWNSHIP 24 SOUTH, RANGE 21 EAST, ALL OF SAID PROPERTY BEING SITUATE IN PASCO COUNTY, FLORIDA.

SUBJECT TO ALL RIGHTS OF WAY FOR ROADS.

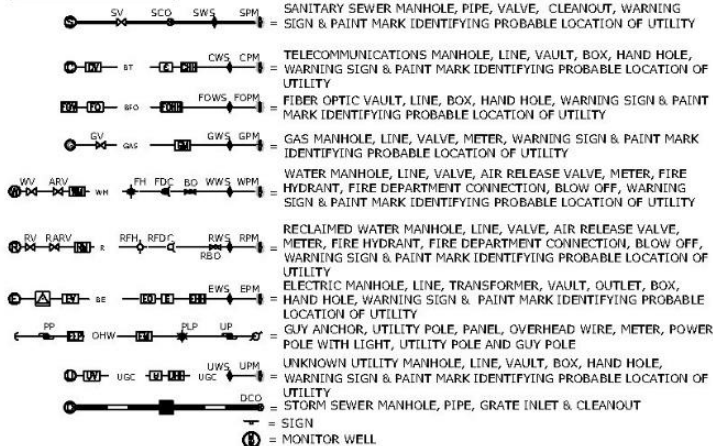
SCHEDULE B-II: (PER COMMITMENT)

- DEFECTS, ENCUMBRANCES, ADVERSE CLAIMS OR OTHER MATTERS, IF ANY, CREATED, FIRST APPEARING IN THE PUBLIC RECORDS OR ATTACHING SUBSEQUENT TO THE EFFECTIVE DATE BUT PRIOR TO THE DATE PROPOSED INSURED ACQUIRES FOR VALUE OF RECORD THE ESTATE OR INTEREST OR MORTGAGE THEREON COVERED BY THIS COMMITMENT.
- NOT A SURVEY MATTER.**
2. ANY RIGHTS, INTERESTS, OR CLAIMS OF PARTIES IN POSSESSION OF THE LAND NOT SHOWN BY THE PUBLIC RECORDS.
- NOT A SURVEY MATTER.**
3. ANY ENCROACHMENT, ENCUMBRANCE, VIOLATION, VARIATION OR ADVERSE CIRCUMSTANCE AFFECTING THE TITLE THAT WOULD BE DISCLOSED BY AN ACCURATE AND COMPLETE LAND SURVEY OF THE LAND.
- NOT A SURVEY MATTER.**
4. ANY LIEN, FOR SERVICES, LABOR, OR MATERIALS IN CONNECTION WITH IMPROVEMENTS, REPAIRS OR RENOVATIONS PROVIDED BEFORE, ON, OR AFTER DATE OF POLICY, NOT SHOWN BY THE PUBLIC RECORDS.
- NOT A SURVEY MATTER.**
5. ANY DISPUTE AS TO THE BOUNDARIES CAUSED BY A CHANGE IN THE LOCATION OF ANY WATER BODY WITHIN OR ADJACENT TO THE LAND PRIOR TO DATE OF POLICY, AND ANY ADVERSE CLAIM TO ALL OR PART OF THE LAND THAT IS, AT DATE OF POLICY, OR WAS PREVIOUSLY UNDER WATER.
- NOT A SURVEY MATTER.**
6. TAXES OR SPECIAL ASSESSMENTS NOT SHOWN AS LIENS IN THE PUBLIC RECORDS OR IN THE RECORDS OF THE LOCAL TAX COLLECTING AUTHORITY, AT DATE OF POLICY.
- NOT A SURVEY MATTER.**
7. INTENTIONALLY DELETED.
8. TAXES AND ASSESSMENTS FOR THE YEAR 2020 AND SUBSEQUENT YEARS, WHICH ARE NOT YET DUE AND PAYABLE.
- NOT A SURVEY MATTER.**
9. INTENTIONALLY DELETED.
10. RULES AND REGULATIONS OF THE SOUTHWEST FLORIDA WATER MANAGEMENT DISTRICT AS SET OUT IN CERTIFICATE RECORDED IN BOOK 190, PAGE 83.
- THE LANDS DESCRIBED THEREIN INCLUDE ALL OF THE SUBJECT PROPERTY.**
11. EASEMENT AGREEMENT BY AND BETWEEN ROADSIDE GROVES AND ANTHONY L. WATKINS RECORDED IN BOOK 5047, PAGE 105 AND SUPPORTED BY AFFIDAVIT RECORDED IN BOOK 5047, PAGE 114.
- SHOWN HEREON.**
12. NOTICE OF ESTABLISHMENT OF THE SUMMIT VIEW COMMUNITY DEVELOPMENT DISTRICT RECORDED IN BOOK 7042, PAGE 1682, TOGETHER WITH THE TERMS AND CONDITIONS CONTAINED IN FINAL JUDGMENT RECORDED IN BOOK 6625, PAGE 1372.
- INCLUDES ALL OF SUBJECT PROPERTY LYING EAST OF HAPPY HILL ROAD.**
13. ANY AND ALL LOSS OR DAMAGE OF ANY KIND, INCLUDING BUT NOT LIMITED TO COSTS AND ATTORNEY'S FEES, ARISING FROM OR RELATED TO ANY CLAIM OR ALLEGATION SET FORTH IN THE PENDING LITIGATION IN THE CIRCUIT COURT OF PASCO COUNTY, FLORIDA, UNDER CASE NO. 2018-CA-001241, STYLED JANET DENLINGER V. SUMMIT VIEW, LLC ET AL.
- NOT A SURVEY MATTER.**
14. ANY AND ALL LOSS OR DAMAGE OF ANY KIND, INCLUDING BUT NOT LIMITED TO COSTS AND ATTORNEY'S FEES, ARISING FROM OR RELATED TO ANY CLAIM OR ALLEGATION SET FORTH IN THE PENDING LITIGATION IN THE CIRCUIT COURT OF PASCO COUNTY, FLORIDA, UNDER CASE NO. 2018-CA-002117, STYLED ROBERTO VALDEZ V. SUMMIT VIEW, LLC ET AL.
- NOT A SURVEY MATTER.**
15. TERMS, CONDITIONS, RIGHTS AND OBLIGATIONS OF THE SETTLEMENT AGREEMENT DATED AUGUST 31, 2018, BY AND BETWEEN THE CITY OF DADE CITY AND SUMMIT VIEW, LLC, DOUGLAS J. WEILAND, JES PROPERTIES, INC., AND CWSESII, LLC, RECORDED OCTOBER 3, 2018 IN BOOK 9797, PAGE 843.
- THE LANDS DESCRIBED THEREIN INCLUDE ALL OF THE SUBJECT PROPERTY.**
16. TERMS, CONDITIONS AND PROVISIONS CONTAINED IN THAT AGREEMENT FOR PROVISION OF WATER AND WASTEWATER SERVICES BETWEEN SUMMIT VIEW, LLC AND CITY OF DADE CITY RECORDED OCTOBER 3, 2018 IN BOOK 9797, PAGE 918.
- INCLUDES ALL OF SUBJECT PROPERTY LYING EAST OF HAPPY HILL ROAD.**
17. EASEMENT OVER THE LAND DESCRIBED IN SCHEDULE "A" IN FAVOR OF THE ADJOINING LANDS RESULTING FROM SAID LANDS BEING LANDLOCKED.
- NOT A SURVEY MATTER.**
18. TERMS AND CONDITIONS OF ANY EXISTING UNRECORDED LEASE(S), AND ALL RIGHTS OF LESSEE(S) AND ANY PARTIES CLAIMING THROUGH THE LESSEE(S) UNDER THE LEASE(S).
- NOT A SURVEY MATTER.**

ABBREVIATION LEGEND:

A/C	= AIR CONDITIONER	MAS	= MASONRY
ADW	= ASPHALT DRIVEWAY	MB	= MAILBOX
BC	= BACK OF CURB	MES	= MITERED END SECTION
BWF	= WIRE OR BARBED WIRE FENCE	MOL	= MORE OR LESS
(C)	= CALCULATED DATA	NAD	= NORTH AMERICAN DATUM
CB	= CABLE / TELECOMMUNICATIONS BOX	NAVD	= NORTH AMERICAN VERTICAL DATUM
CCR	= CERTIFIED CORNER RECORD	NCV	= NATIONAL GEODETIC VERTICAL DATUM
CDW	= CONCRETE DRIVEWAY	NP	= NORMAL POOL ELEVATION
CLF	= CHAIN LINK FENCE	NR	= NON-RADIAL
CMP	= CORRUGATED METAL PIPE	OA	= OVERALL
CO	= CLEANOUT	OHW	= OVERHEAD WIRE
CONC	= CONCRETE	ORB	= OFFICIAL RECORDS BOOK
CPB	= CONDO PLAT BOOK	(P)	= PLAT DATA
CPC	= CORRUGATED PLASTIC PIPE	PAO	= PROPERTY APPRAISERS OFFICE
CSW	= CONCRETE SIDEWALK	PB	= PLAT BOOK
CV	= COVERED CONC	PE	= PEDESTRIAN CROSSWALK SIGNAL
(D)	= DEED DATA	PG(S)	= PAGE(S)
DB	= DEED BOOK	PL	= PROPERTY LINE
DBH	= DIAMETER BREAST HEIGHT	POB	= POINT OF BEGINNING
DMH	= DRAINAGE MANHOLE	POC	= POINT OF COMMENCEMENT
EB	= ELECTRIC BOX	POL	= POINT ON LINE
ELEC	= ELECTRIC	PP	= POWER/UTILITY POLE
EW	= EDGE OF WATER	PVC	= POLYVINYLCHLORIDE PIPE
EP	= EDGE OF PAVEMENT	PVCF	= PVC FENCE
EPM	= ELECTRIC PAINT MARK	RCP	= REINFORCED CONC PIPE
ERCP	= ELLIPTICAL REINFORCED CONCRETE PIPE	R/W	= RIGHT-OF-WAY
ESMT	= EASEMENT	RWM	= RIGHT-OF-WAY MAP
FFE	= FINISHED FLOOR ELEVATION	SEC	= SET 4"x4" CONCRETE MONUMENT
FH	= FIBER HYDRANT	SCM	= PRM LB 8342
FCM	= FOGGED CONCRETE MONUMENT (AS NOTED)	SEC	= SECTION, TOWNSHIP AND RANGE
FDOT	= FLORIDA DEPARTMENT OF TRANSPORTATION	SHW	= SEASONAL HIGH WATER ELEVATION
FIR	= FOUND IRON ROD (AS NOTED)	SIR	= SET IRON ROD 1/2" LB 8342
FIND	= FOUND NAIL AND DISK (AS NOTED)	SMH	= SANITARY MANHOLE
FNL	= FOUND NAIL	SND	= SET NAIL AND DISK LB 8342
FOB	= FIBER OPTIC BOX	SPM	= SANITARY PAINT MARK
FOP	= FOUND OPEN PIPE	SRD	= STATE ROAD DEPARTMENT
FOV	= FIBER OPTIC VAULT	S/W	= SIDEWALK
FPF	= FOUND PINCHED PIPE	SDF	= WOOD FENCE
FRS	= FOUND RAILROAD SPIKE	WM	= WATER METER
FXC	= FOUND X-CUT	WPM	= WATER PAINT MARK
GI	= GRATE INLET	WV	= WATER VALVE
GPM	= GAS PAINT MARK	TBM	= TEMPORARY BENCHMARK
GUY	= GUY ANCHOR	THH	= TRAFFIC HAND HOLE
GV	= GAS VALVE	TOS	= TOP OF BANK
IE	= INVERT ELEVATION	TOT	= TOE OF SLOPE
IHH	= IRRIGATION HAND HOLE	TSB	= TRAFFIC SIGNAL BOX
IV	= IRRIGATION VALVE	TSV	= TRAFFIC SIGNAL POLE
(L)	= LEGAL DESCRIPTION DATA	TSV	= TRAFFIC SIGNAL VAULT
LP	= LIGHT POLE	VIP	= VITRIFIED CLAY PIPE
(M)	= MEASURED DATA	DIP	= DUCTILE IRON PIPE

SYMBOL LEGEND:



LINETYPE LEGEND:

_____ = BOUNDARY
 TDS = TOE OF SLOPE
 TOB ▲ ▲ ▲ ▲ = TOP OF BANK
 - - - - - = RIGHT-OF-WAY
 _____ = CENTERLINE

SURVEYOR'S NOTES:

- TYPE SURVEY: BOUNDARY AND TOPOGRAPHIC SURVEY. THE INTENT OF THIS SURVEY IS TO SHOW A LIMITED NUMBER OF NUMBER TRANSACTS TO FACILITATE COMPARISON WITH LIDAR TOPOGRAPHIC DATA. ANY USE OF THIS SURVEY FOR PURPOSES OTHER THAN WHICH IT WAS INTENDED, WITHOUT WRITTEN VERIFICATION, WILL BE AT THE USER'S SOLE RISK AND WITHOUT LIABILITY TO THE SURVEYOR. NOTHING HEREIN SHALL BE CONSTRUED TO GIVE ANY RIGHTS OR BENEFITS TO ANYONE OTHER THAN THOSE CERTIFIED TO.
2. THIS SURVEY WAS PREPARED WITH THE BENEFIT OF A COMMITMENT FOR TITLE INSURANCE PREPARED BY FIRST AMERICAN TITLE INSURANCE COMPANY, FILE NO. 2061-4804933, DATED JUNE 30, 2020 @ 8:00AM (AND NOTED N/C THRU 2/5/21 @ 8:00 AM). SEE SCHEDULE B-II AND NOTES, THIS SHEET.
3. NO INSTRUMENTS OF RECORD REFLECTING EASEMENTS, RIGHTS-OF-WAY, AND/OR OWNERSHIP WERE FURNISHED TO OR PURSUED BY THE UNDERSIGNED OTHER THAN THOSE SHOWN HEREON. EASEMENTS OR RESTRICTIONS OF RECORD OTHER THAN THOSE SHOWN HEREON MAY EXIST.
4. NO EXCAVATION WAS PERFORMED TO VERIFY THE LOCATION OR EXISTENCE OF ANY UNDERGROUND IMPROVEMENTS, STRUCTURES, OR FOUNDATIONS. UNDERGROUND UTILITIES IF SHOWN HEREON ARE SHOWN PER ABOVE GROUND EVIDENCE AND/OR RECORD DRAWINGS OR MUNICIPAL ATLAS INFORMATION AND THE LOCATION OF ALL UNDERGROUND UTILITY LINES ARE APPROXIMATE ONLY. THIS DOCUMENT SHOULD NOT BE RELIED UPON FOR EXCAVATION OR CRITICAL DESIGN FUNCTIONS WITHOUT FIELD VERIFICATION OF UNDERGROUND UTILITY LOCATIONS. UTILITIES OTHER THAN THOSE SHOWN HEREON MAY EXIST.
5. THE SURVEY DEPICTED HEREON IS NOT INTENDED TO SHOW THE LOCATION OR EXISTENCE OF ANY WETLAND OR JURISDICTIONAL AREAS, OR AREAS OF PROTECTED SPECIES OF VEGETATION EITHER NATURAL OR CULTIVATED.
6. THIS SURVEY MAP AND REPORT OR COPIES THEREOF ARE NOT VALID WITHOUT THE ORIGINAL SIGNATURE AND SEAL OF A FLORIDA LICENSED SURVEYOR AND MAPPER.
7. ADDITIONS OR DELETIONS TO SURVEY MAPS OR REPORTS BY OTHER THAN THE SIGNING PARTY OR PARTIES IS PROHIBITED WITHOUT WRITTEN CONSENT OF THE SIGNING PARTY OR PARTIES.
8. ADJOINING PROPERTY OWNERS AND RECORDING INFORMATION IS BASED ON THE COUNTY PROPERTY APPRAISER WEB SITE AND IS FOR INFORMATIONAL PURPOSES ONLY. NAMES AND RECORDING INFORMATION WAS OBTAINED ON 3/5/2021.
9. AT THE TIME OF THIS SURVEY THERE IS CURRENT EARTH MOVING WORK UNDER WAY ON THE SUBJECT PROPERTY.
10. INTERIOR IMPROVEMENTS ARE SHOWN ACCORDING TO THAT CERTAIN TOPOGRAPHIC SURVEY REFERENCED IN SURVEYOR'S NOTE 15(C) AND HAVE NOT BEEN RESURVEYED FOR THIS SURVEY.
11. BEARINGS AND DISTANCES SHOWN HEREON ARE MEASURED UNLESS QUALIFIED OTHERWISE.
12. BEARINGS AND STATE PLANE COORDINATES (FLORIDA WEST ZONE) SHOWN HEREON ARE BASED ON THE NORTH AMERICAN DATUM (NAD) 83(2011). CONTROL STATIONS UTILIZED ARE IDENTIFIED BY THE NATIONAL GEODETIC SURVEY (NGS) AS "K37 155" AND "L37 156". AS A MEANS OF REFERENCE THE SOUTH LINE OF THE NORTHWEST 1/4 OF THE SOUTHWEST 1/4 OF SECTION 32, TOWNSHIP 24 SOUTH, RANGE 21 EAST, BEING N89°56'22"W, AS SHOWN HEREON.
13. HORIZONTAL CONTROL POSITIONS WERE DERIVED BY GLOBAL POSITIONING SYSTEM (GPS) OBSERVATIONS UTILIZING A VIRTUAL REFERENCE STATION REAL TIME NETWORK SOLUTION AND ARE THE PRODUCT OF REDUNDANT OBSERVATIONAL SESSIONS CONSISTING OF AT LEAST 60 EPOCHS EACH. THE MAXIMUM POSITIONAL UNCERTAINTY OF THE PHYSICAL CONTROL POINTS IS COMPUTED TO BE 0.05 FEET USING THE ALGEBRAIC SUM MEAN OF THE PROCESSED POSITIONS.
14. COORDINATES AND DISTANCES SHOWN HEREON ARE IN U.S. SURVEY FEET.
15. THIS SURVEY WAS PREPARED WITH THE BENEFIT OF THE FOLLOWING:
- A) STATE OF FLORIDA STATE ROAD DEPARTMENT RIGHT-OF-WAY MAP FOR SECTION NO. 14510-2152 (ROAD NO. 9-579) AS RECORDED IN ROAD PLAT BOOK 1, PAGE 279 OF THE PUBLIC RECORDS OF PASCO COUNTY, FLORIDA. THE RIGHT-OF-WAY FOR HAPPY HILL ROAD IS ACCORDING TO SAID RIGHT-OF-WAY MAP.
- B) A TOPOGRAPHIC SURVEY OF THE SUBJECT PROPERTY TITLE "SUMMIT VIEW" PREPARED BY FLORIDA LAND DESIGN & PERMITTING, INC., PROJECT NUMBER 2020-1039, DATED JUNE 5, 2020.
- C) F7 2007 PASCO COUNTY HORIZONTAL CONTROL DENIFICATION (L726) MAP FOR TOWNSHIP 24 SOUTH, RANGE 21 EAST, AS PREPARED BY DC JOHNSON ASSOCIATES, PROJECT NUMBER NO. 2006-102A01, DATED 3/3/2008. CERTAIN SURVEYED SECTION CORNER POSITIONS WERE CALCULATED UTILIZING THIS MAP.
- D) CERTIFIED CORNER RECORDS AS NOTED HEREON, AS PUBLISHED BY THE FLORIDA DEPARTMENT OF ENVIRONMENTAL PROTECTION.
- E) UNITED STATES GEOLOGICAL SURVEY TOPOGRAPHIC MAP OF DADE CITY, FLORIDA (2018). NAMES OF WATER BODIES SHOWN HEREON ARE ACCORDING TO SAID MAP.
16. BY SCALED DETERMINATION THE SUBJECT PROPERTY APPEARS TO LIE IN FLOOD ZONE "X" (UNSHADED, AREAS DETERMINED TO BE OUTSIDE THE 0.2% ANNUAL CHANCE FLOODPLAIN) PER FLOOD INSURANCE RATE MAP NUMBER 12101C0280F, MAP EFFECTIVE DATE SEPTEMBER 26, 2014. AN ACCURATE ZONE DETERMINATION SHOULD BE MADE BY THE PREPARED OF THE MAP, THE FEDERAL EMERGENCY MANAGEMENT AGENCY, OR THE LOCAL GOVERNMENT AGENCY HAVING JURISDICTION OVER SUCH MATTERS PRIOR TO ANY JUDGMENTS BEING MADE FROM THE ZONE AS NOTED.
17. EXCEPT IN THE CASE OF AN IRREGULAR BOUNDARY OR WATER COURSE, NUMERICAL EXPRESSIONS SHOWN HEREON TO THE NEAREST FOOT OR TENTH OF A FOOT ARE TO BE INTERPRETED AS HAVING A PRECISION TO THE NEAREST ONE-HUNDREDTH OF A FOOT.
18. LAST DATE OF FIELD SURVEY: 11/23/2020

FLORIDA LAND DESIGN & PERMITTING, INC.
CERTIFICATE OF AUTHORIZATION LB8342

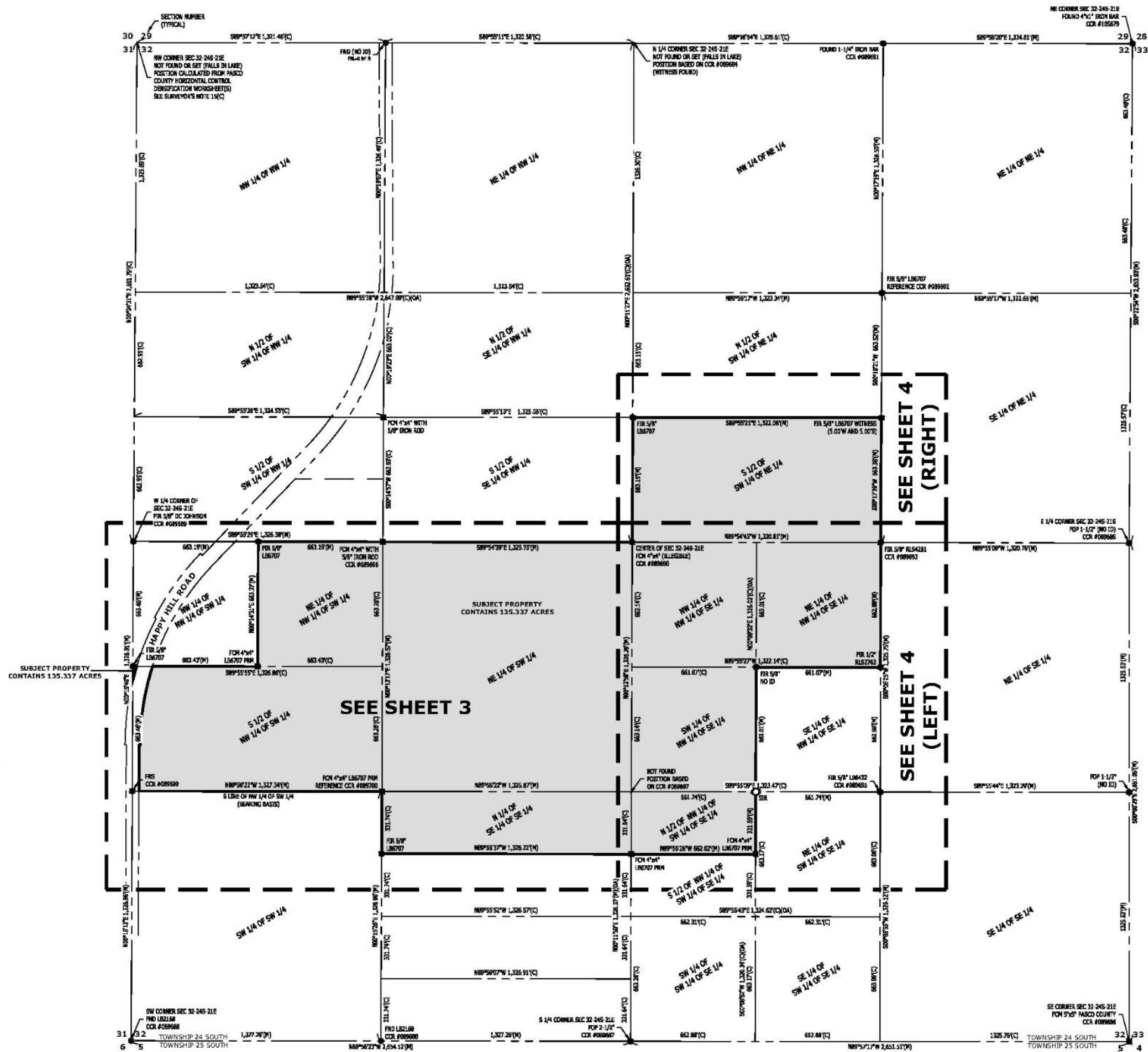
JOSEPH E. BECKMAN, PSM
STATE OF FLORIDA LS7204

CERTIFIED TO:

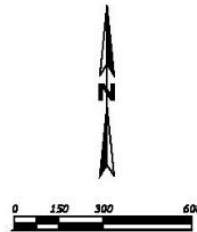
D.R. HORTON, INC., A DELAWARE CORPORATION
FIRST AMERICAN TITLE INSURANCE COMPANY
BOOTH & COOK, P.A.
SUMMIT VIEW, LLC

<div>  <div> <div>Florida Land</div> <div>Design & Permitting</div> </div> </div>		2020 STANLEY BOLLIGARD TRINITY, FLORIDA 34655 PHONE: (771) 478-2421 www.floridapdp.com E-mail: info@floridapdp.com License No. 130148 Survey# 1-133432	
<div> <div>SUMMIT VIEW, LLC</div> <div> 34 E LAMAR ROAD #172 PALM BEACH, FLORIDA 33480 PHONE: 561-852-9792 </div> </div>		<div> <div>SUMMIT VIEW</div> <div>BOUNDARY SURVEY</div> </div>	
PREPARED FOR	PROJECT NO	1039	
PROJECT NO 00030004	PROJECT NAME	2020-1039	
DATE 3/10/2021	JEB	NONE	JEB
SHEET	1	OF	4

— SUBJECT PROPERTY



KEY MAP AND SECTION BREAKDOWN SHEET



Florida Land Design & Permitting

3035 OCEAN BLVD. SUITE 100
FORT MYERS, FL 33905
PHONE: (772) 478-2421
FAX: (772) 478-2422
E-MAIL: info@fldesign.com
Engineer # C-10384
Surveyor # 18342

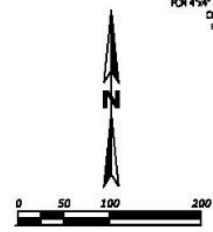
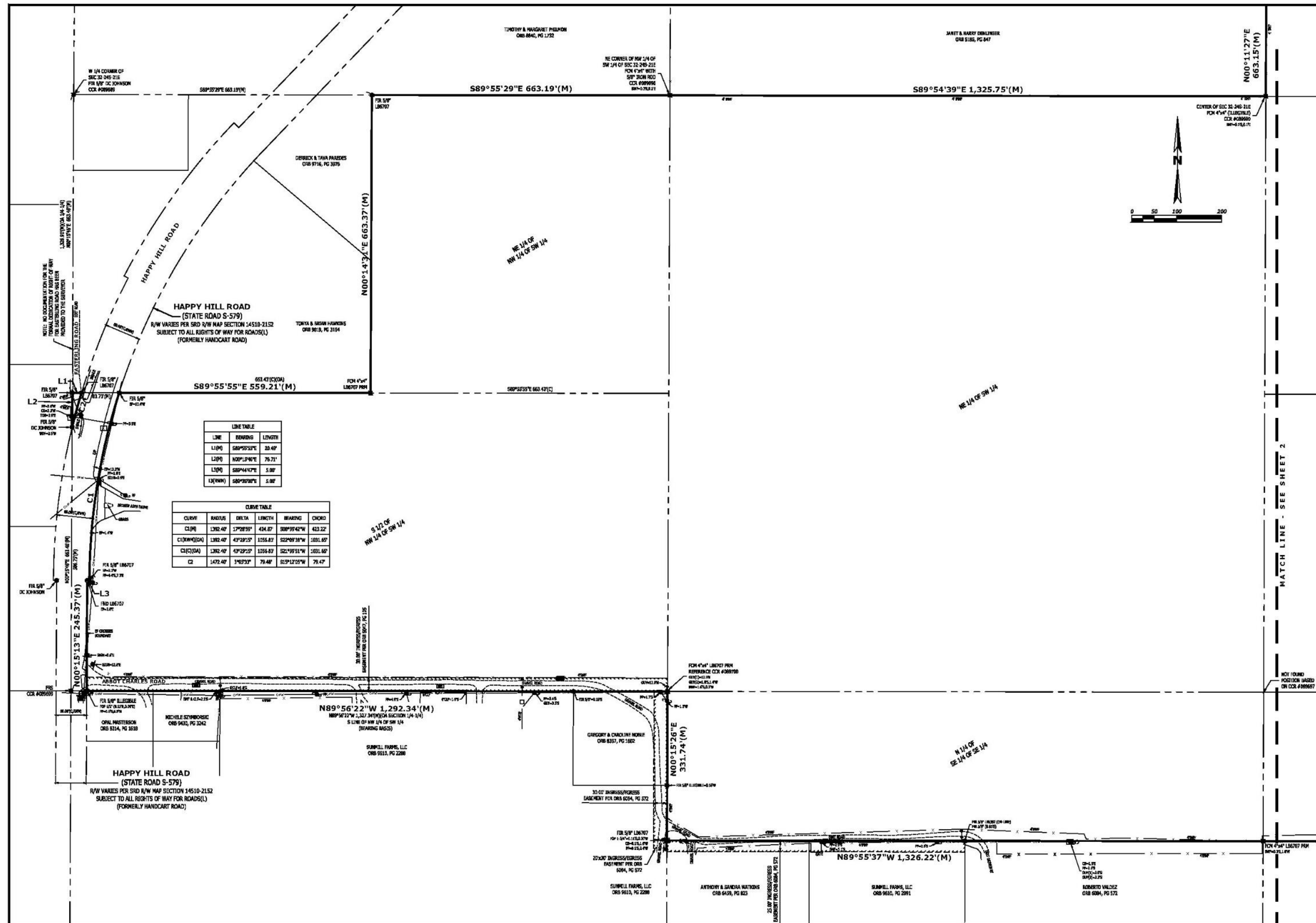
SUMMIT VIEW, LLC

34 E. LAKE ROAD #172
PALM BEACH, FL 33480
(561) 852-9925

SUMMIT VIEW

BOUNDARY SURVEY

PROJECT NO.	1039
PROJECT DATE	2020-10-30
FIELD BOOK	0003/0004
DRAWN	JEB
CHECKED	JEB
DATE	3/10/2021
SHEET	2 of 4



LINE TABLE		
LINE	BEARING	LENGTH
L1(M)	S89°55'53"E	20.49'
L2(M)	N00°13'46"E	76.71'
L3(M)	S89°44'47"E	5.00'
L3(RAIN)	S89°35'00"E	5.00'

CURVE TABLE					
CURVE	RADIUS	DELTA	LENGTH	BEARING	CHORD
CL(H)	1392.40	17°28'55"	434.87	S00°59'42"W	423.22
CL(RHWD)(DA)	1392.40	43°29'15"	1356.83	S22°09'38"W	1031.65
CL(C)(DA)	1392.40	43°29'15"	1356.83	S21°59'51"W	1031.65
C2	1472.40	34°05'33"	79.46	S15°12'05"W	79.47

**Florida Land
Design &
Permitting**

3035 STARKEY BOULEVARD
TRINITY, FLORIDA 34455

PHONE: (727) 478-2023
FAX: (727) 478-2021
www.flalnd.com
E-mail: info@flalnd.com
Engineer # CA No. 33048
Surveyor # - 183942

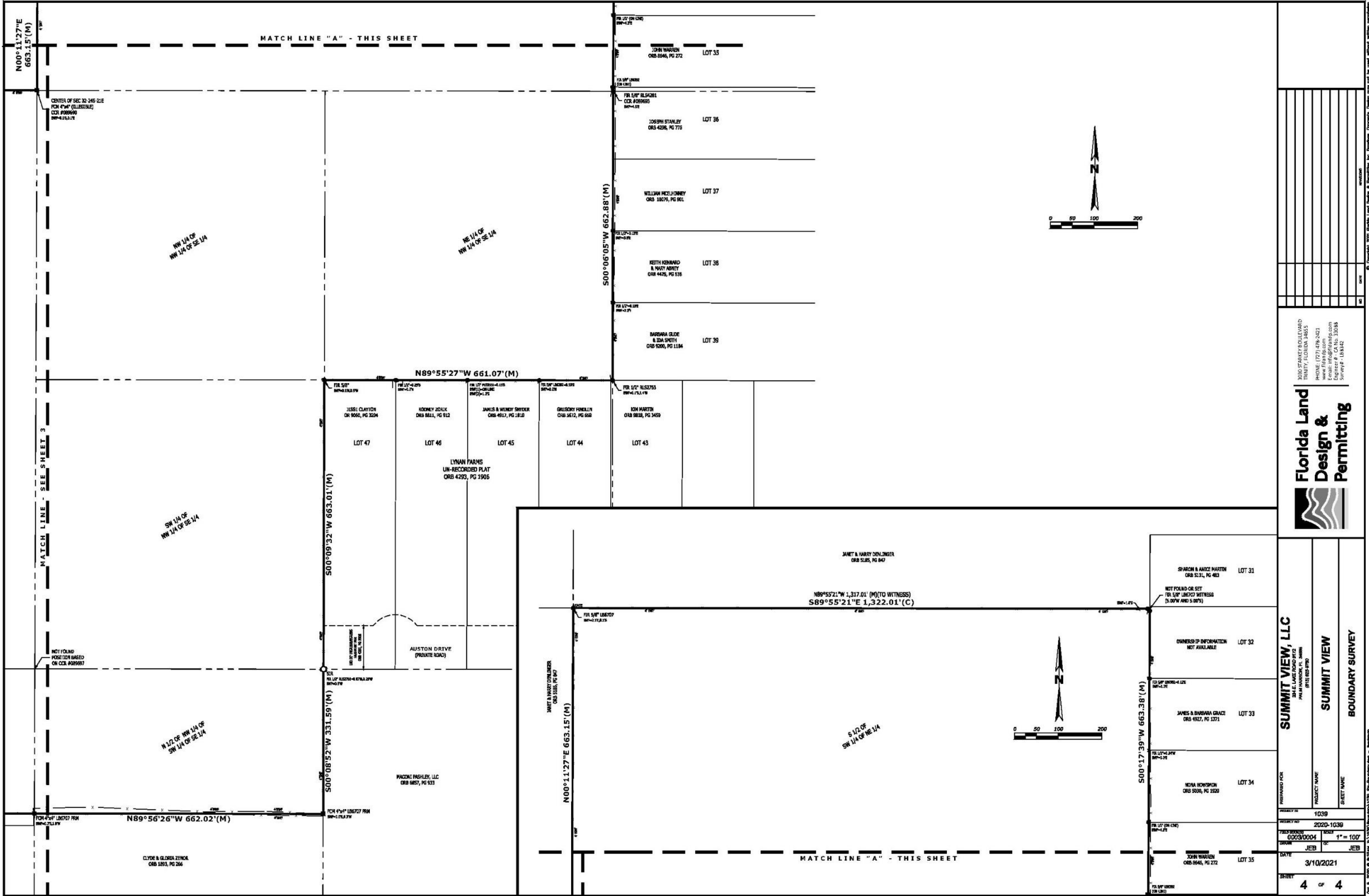
SUMMIT VIEW, LLC
3M E LAKE ROAD #172
PULAM HARBOR, N. CAROLINA
(919) 652-4790

SUMMIT VIEW

BOUNDARY SURVEY

PROJECT NO	1039	
PROJECT NO	2020-1039	
FIELD NUMBER	0003/0004	SCALE 1" = 100'
DRAWN	JEB	JEB
DATE	3/10/2021	
SHEET	3 OF 4	

13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60	61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80	81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99	100	101	102	103	104	105	106	107	108	109	110	111	112	113	114	115	116	117	118	119	120	121	122	123	124	125	126	127	128	129	130	131	132	133	134	135	136	137	138	139	140	141	142	143	144	145	146	147	148	149	150	151	152	153	154	155	156	157	158	159	160	161	162	163	164	165	166	167	168	169	170	171	172	173	174	175	176	177	178	179	180	181	182	183	184	185	186	187	188	189	190	191	192	193	194	195	196	197	198	199	200	201	202	203	204	205	206	207	208	209	210	211	212	213	214	215	216	217	218	219	220	221	222	223	224	225	226	227	228	229	230	231	232	233	234	235	236	237	238	239	240	241	242	243	244	245	246	247	248	249	250	251	252	253	254	255	256	257	258	259	260	261	262	263	264	265	266	267	268	269	270	271	272	273	274	275	276	277	278	279	280	281	282	283	284	285	286	287	288	289	290	291	292	293	294	295	296	297	298	299	300	301	302	303	304	305	306	307	308	309	310	311	312	313	314	315	316	317	318	319	320	321	322	323	324	325	326	327	328	329	330	331	332	333	334	335	336	337	338	339	340	341	342	343	344	345	346	347	348	349	350	351	352	353	354	355	356	357	358	359	360	361	362	363	364	365	366	367	368	369	370	371	372	373	374	375	376	377	378	379	380	381	382	383	384	385	386	387	388	389	390	391	392	393	394	395	396	397	398	399	400	401	402	403	404	405	406	407	408	409	410	411	412	413	414	415	416	417	418	419	420	421	422	423	424	425	426	427	428	429	430	431	432	433	434	435	436	437	438	439	440	441	442	443	444	445	446	447	448	449	450	451	452	453	454	455	456	457	458	459	460	461	462	463	464	465	466	467	468	469	470	471	472	473	474	475	476
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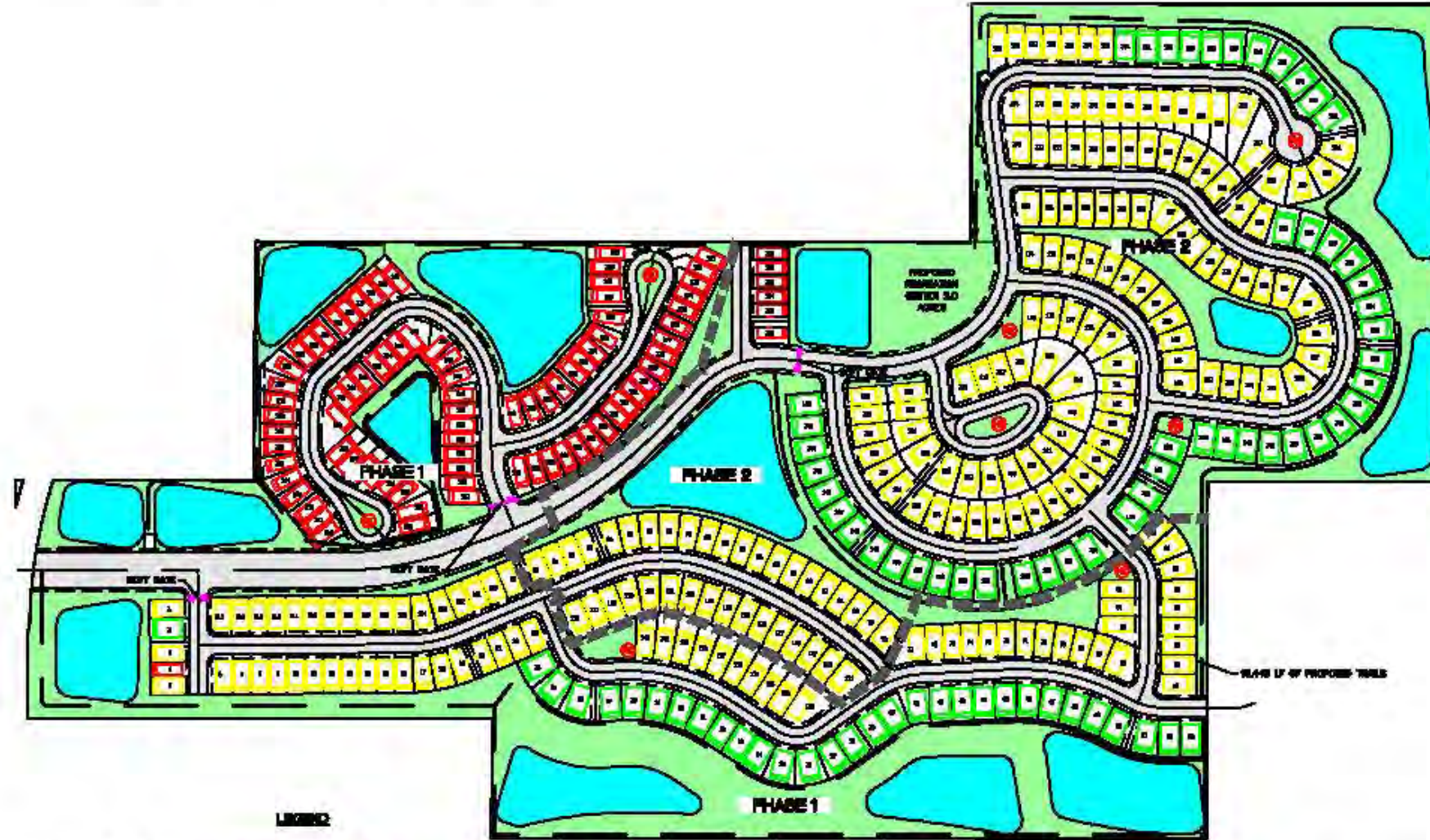
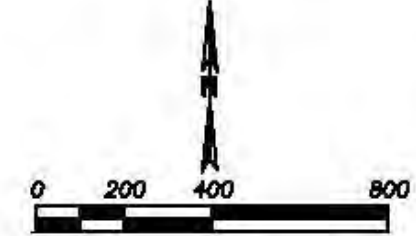
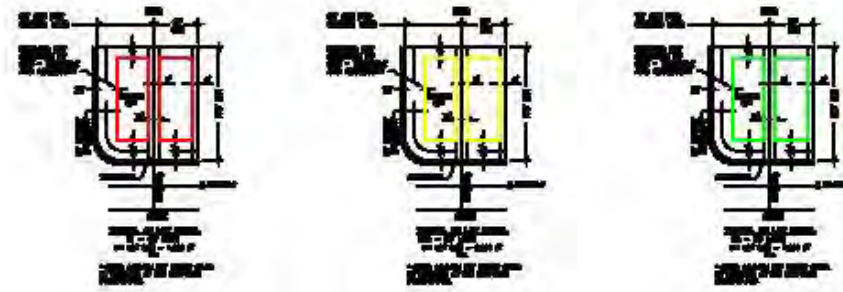


Florida Land Design & Permitting

3025 STARKEY BOULEVARD
TRINITY, FLORIDA 34655
PHONE: (727) 398-2421
FAX: (727) 398-2421
E-mail: info@floridaland.com
Engineer # CA No. 33088
Surveyor # 16842

SUMMIT VIEW, LLC	
PROJECT NO.	1039
PROJECT NAME	2020-1039
PROJECT NO.	00030004
DATE	JEB
DATE	3/10/2021
SHEET	4 OF 4

EXHIBIT “B”



LEGEND

LANDSCAPE OPEN SPACE	
POND OPEN SPACE	
RIGHT OF WAY	
PROPOSED TRAILS	
MAIL KIOSK	

ACRES	
TOTAL OPEN SPACE	53.46 AC
RIGHT OF WAY	22.10 AC
TOTAL LOTS	59.80 AC
TOTAL PARCEL	135.35 AC

		SUMMIT VIEW LLC <small>3817 LANDSHIRE DR. CLEARWATER, FL 34615-4600 PHONE: (727) 722-0208</small>
Florida Land Design & Permitting <small>10000 W. US HWY 90, SUITE 100 TAMPA, FL 33613 PHONE: (813) 434-1000 FAX: (813) 434-1001 WWW.FLDPERM.COM</small>		SUMMIT VIEW COMMUNITY DEVELOPMENT DISTRICT EXHIBIT B
PROJECT NO. 1039	PROJECT NAME 2020-1039	PROJECT NAME EFR
PROJECT NAME EFR	PROJECT NAME PS	PROJECT NAME PS
PROJECT NAME PS	PROJECT NAME 4-23-2021	PROJECT NAME 1 OF 1

EXHIBIT “C”

LEGAL DESCRIPTION

THE SOUTH 1/2 OF THE SOUTHWEST 1/4 OF THE NORTHEAST 1/4; THE NORTHEAST 1/4 OF THE NORTHWEST 1/4 OF THE SOUTHEAST 1/4; THE NORTHWEST 1/4 OF THE NORTHWEST 1/4 OF THE SOUTHEAST 1/4; THE SOUTHWEST 1/4 OF THE NORTHWEST 1/4 OF THE SOUTHEAST 1/4, AND THE NORTH 1/2 OF THE NORTHWEST 1/4 OF THE SOUTHWEST 1/4 OF THE SOUTHEAST 1/4; THE NORTHEAST 1/4 OF THE SOUTHWEST 1/4; THE NORTH 1/4 OF THE SOUTHEAST 1/4 OF THE SOUTHWEST 1/4; THE NORTHEAST 1/4 OF THE NORTHWEST 1/4 OF THE SOUTHWEST 1/4, AND THE SOUTH 1/2 OF THE NORTHWEST 1/4 OF THE SOUTHWEST 1/4 ALL IN SECTION 32, TOWNSHIP 24 SOUTH, RANGE 21 EAST, ALL OF SAID PROPERTY BEING SITUATE IN PASCO COUNTY, FLORIDA.

SUBJECT TO ALL RIGHTS OF WAY FOR ROADS

Tab 3

MINUTES OF MEETING

Each person who decides to appeal any decision made by the Board with respect to any matter considered at the meeting is advised that the person may need to ensure that a verbatim record of the proceedings is made, including the testimony and evidence upon which such appeal is to be based.

SUMMIT VIEW COMMUNITY DEVELOPMENT DISTRICT

The audit committee meeting of the Board of Supervisors of Summit View Community Development District was held on **Friday, April 30, 2021, at 10:00 a.m.** at the office of Rizzetta & Company, Inc., located at 5844 Old Pasco Road, Suite 100, Wesley Chapel, FL 33544.

Audit Committee Present:

Dr. Weiland	Board Supervisor, Chairman
Natalie Feldman	Board Supervisor, Vice Chairman
Pete Williams	Board Supervisor, Assistant Secretary
John Blakley	Board Supervisor, Assistant Secretary

Also present were:

Matthew Huber	Regional District Manager, Rizzetta & Company
Jennifer Kilinski	District Counsel, Hopping, Green & Sams, P.A.
	<i>(via conference call)</i>
Paul Skidmore	Interim District Engineer, Florida Design
	<i>(via conference call)</i>

Audience	None
----------	-------------

FIRST ORDER OF BUSINESS

Call to Order and Roll Call

Mr. Huber called the meeting to order and conducted roll call.

SECOND ORDER OF BUSINESS

Audience Comments

Mr. Huber advised for the record that no members of the public were present.

THIRD ORDER OF BUSINESS

Presentation of Audit Proposal
Instructions and Audit Evaluation
Criteria

Mr. Huber presented the audit proposal instructions and Audit Evaluation Criteria.

SUMMIT VIEW COMMUNITY DEVELOPMENT DISTRICT

May 21, 2021 - Minutes of Meeting

Page 2

On a Motion by Mr. Williams, seconded by Mr. Blakley, with all in favor, the Audit Committee approved the Audit Proposal Instructions and Audit Evaluation Criteria with price included for Summit View Community Development District.

FOURTH ORDER OF BUSINESS

Adjournment

Mr. Huber stated if there was no further business to come before the Audit Committee, then a motion to adjourn would be in order.

On a Motion by Mr. Williams, seconded by Mr. Blakley, with all in favor, the Board adjourned the audit committee meeting at 10:04 a.m. for Summit View Community Development District.

Secretary/Assistant Secretary

Chairman/ Vice Chairman

Tab 4

SUMMIT VIEW COMMUNITY DEVELOPMENT DISTRICT

District Office · Tampa, Florida · (813) 994-1001

Mailing Address – 3434 Colwell Avenue, Suite 200, Tampa, Florida 33614

Operation and Maintenance Expenditures May 2021 For Board Approval

Attached please find the check register listing the Operation and Maintenance expenditures paid from May 1, 2021 through May 31, 2021. This does not include expenditures previously approved by the Board.

The total items being presented: **\$17,861.04**

Approval of Expenditures:

_____ Chairperson

_____ Vice Chairperson

_____ Assistant Secretary

Summit View Community Development District

Paid Operation & Maintenance Expenditures

May 1, 2021 Through May 31, 2021

<u>Vendor Name</u>	<u>Check Number</u>	<u>Invoice Number</u>	<u>Invoice Description</u>	<u>Invoice Amount</u>
Hopping Green & Sams, P.A.	001004	120930	General Legal Services 02/21	\$ 6,984.00
John C Blakely	001002	JB031921	Board Of Supervisors Meeting 03/19/21	\$ 200.00
Natalie T Feldman	001003	NF031921	Board Of Supervisors Meeting 03/19/21	\$ 200.00
Pasco County Property Appraiser	001001	040121	Non-Ad Valorem Assestment Roll Annual Fee 04/21	\$ 150.00
Pete F Williams	001007	PW031921	Board Of Supervisors Meeting 03/19/21	\$ 200.00
Rizzetta & Company Inc	001006	INV0000058215	District Management Fees 03/21-05/21	\$ 7,638.64
Times Publishing Company	001005	0000142922 02/28/21	Legal Advertising #314820 0000142922 02/28/21	\$ 459.00
Times Publishing Company	001005	0000149718 04/14/21	Legal Advertising #314820 0000149718 04/14/21	\$ 1,263.40
Times Publishing Company	001005	0000149794 04/21/21	Legal Advertising #314820 0000149794 04/21/21	\$ 109.60
Times Publishing Company	001005	0000150399 04/21/21	Legal Advertising #314820 0000150399 04/21/21	\$ 186.40

Summit View Community Development District

Paid Operation & Maintenance Expenditures

May 1, 2021 Through May 31, 2021

<u>Vendor Name</u>	<u>Check Number</u>	<u>Invoice Number</u>	<u>Invoice Description</u>	<u>Invoice Amount</u>
Times Publishing Company	001005	0000150402 04/18/21	Legal Advertising #314820 0000150402 04/18/21	\$ 165.00
Times Publishing Company	001005	0000150404 04/25/21	Legal Advertising #314820 0000150404 04/25/21	<u>\$ 305.00</u>
Report Total				<u><u>\$ 17,861.04</u></u>

Hopping Green & Sams

Attorneys and Counselors

119 S. Monroe Street, Ste. 300
P.O. Box 6526
Tallahassee, FL 32314
850.222.7500

===== STATEMENT =====

March 19, 2021

Summit View Community Development District
c/o Rizzetta & Company, Inc.
5844 Old Pasco Road, Suite 100
Wesley Chapel, FL 33544

Bill Number 120930
Billed through 02/28/2021

Date Rec'd Rizzetta & Co., Inc. 04/15/21

D/M approval Meh Date 04/20

Date entered 04/15/21

Fund 001 GL 51400 OC 3107

Check #

General Counsel
SUVCDD 00001 JLK

FOR PROFESSIONAL SERVICES RENDERED

02/08/21	JLK	Review historical documents and confer with District manager on same; review recorded documents.	0.60 hrs
02/09/21	JLK	Conference call with District manager regarding project status and validation; begin review of documents on same.	0.50 hrs
02/10/21	JLK	Conference call with development team on restarting CDD; continue review of various historical documents provided by District manager; review validation; review ER and AM; review records for assessment notices.	1.40 hrs
02/10/21	EGRE	Review documents and conduct due diligence on status of bond validation and establishment of District.	1.60 hrs
02/11/21	JLK	Review historical documents and summary on same; transmit information on same.	0.80 hrs
02/12/21	JLK	Confer with landowner regarding plat bond options and transmit sample letter on same; confer with Earlywine regarding project questions and options, fill dirt, impact fees and related information; continue reviewing historical documents and preparing outline for options/opinions for Monday call on same, including validation and status of CDD, elections, DEO options, etc.	1.80 hrs
02/15/21	JLK	Conference call regarding restart of district; draft letter regarding financing matters; review/disseminate landowner notice and election documents; begin preparation of meeting documents/agenda; review engineers reports and previous methodologies and confer with staff on same.	2.30 hrs
02/17/21	JLK	Update court letter; transmit same; confer regarding landowner election notice and date; review/transmit list of items needed for first board meeting; confer with engineer regarding report.	1.30 hrs
02/17/21	EGRE	Revise document checklist; review draft engineer's report; prepare organizational meeting documents; review draft agenda.	2.20 hrs
02/18/21	JLK	Review/edit and transmit plat bond letter; confer regarding LOE meeting dates, schedule and final notice and continue work on draft agreements.	1.10 hrs
02/18/21	EGRE	Prepare organizational documents; prepare and revise letter to city regarding	1.30 hrs

plat bond.

02/19/21	JLK	Continue drafting/review of district board meeting; confer regarding quorum; confer regarding bond letter; transmit information on same.	1.30 hrs
02/19/21	EGRE	Review and prepare management agreement; prepare assessment resolution and notices; prepare financing agreements.	1.70 hrs
02/22/21	JLK	Confer with staff regarding MBS engagement; confer regarding updated landowner documents and notices for same; transmit same.	0.40 hrs
02/22/21	EGRE	Revise landowner election forms; review revised agenda; review agreement with underwriter.	0.60 hrs
02/25/21	JLK	Review correspondence on engineers report and assessment structure for financing impact fee creditable improvements.	0.20 hrs
02/26/21	JLK	Conference call regarding various financing documents and strategies; confer regarding acquisition package and contract assignment options.	0.60 hrs
02/27/21	JLK	Begin reviewing multiple re-organization meeting documents, including rules of procedure, construction management, construction funding, budget documents, developer funding, acquisition agreement, RFQ for engineering, engineering services, completion agreement, collateral assignment and various other documents; provide preliminary edits on same.	2.30 hrs
02/28/21	JLK	Confer with Earlywine regarding construction management contract and options for same; review same.	0.40 hrs
Total fees for this matter			\$6,984.00

MATTER SUMMARY

Gregory, Emma C.	7.40 hrs	285 /hr	\$2,109.00
Kilinski, Jennifer L.	15.00 hrs	325 /hr	\$4,875.00
TOTAL FEES			\$6,984.00

TOTAL CHARGES FOR THIS MATTER **\$6,984.00**

BILLING SUMMARY

Gregory, Emma C.	7.40 hrs	285 /hr	\$2,109.00
Kilinski, Jennifer L.	15.00 hrs	325 /hr	\$4,875.00
TOTAL FEES			\$6,984.00

TOTAL CHARGES FOR THIS BILL **\$6,984.00**

Please include the bill number with your payment.

Summit View CDD
Meeting Date: March 19, 2021

SUPERVISOR PAY REQUEST

Name of Board Supervisor	Check if present	Check if paid
Doug Weiland	X	NO
Pete Williams	X	Yes
John Blakely	X	Yes
Rober Tankel	X	NO
Natalie Feldman	X	Yes

(*) Does not get paid

EXTENDED MEETING TIMECARD

Meeting Start Time:	10:05 AM
Meeting End Time:	11:28 AM
Total Meeting Time:	1 hr 20

Time Over 3 () Hours: 0

Total at \$175 per Hour: 0

Date Rec'd Rizzetta & Co., Inc. 03/25/21

D/M approval Meh Date 04/20

Date entered 03/25/21

Fund 001 GL 51100 OC 1101

Check # _____

DM Signature: 



Mike Wells Property Appraiser

Proudly Serving Pasco County, Florida

April 1, 2021

Mr. Scott Brizendine
Rizzetta & Company, Inc.
12750 Citrus Park Lane Suite 115
Tampa, FL 33625

Dear Mr. Brizendine:

Listed below is the Non-Ad Valorem Calendar for Asturia, Avalon Park West, Bexley, Bridgewater of Wesley Chapel, Chapel Creek, Concord Station, Connerton West, Copperspring, Country Walk, Del Webb Bexley, Hidden Creek North, Lake Padgett Estates ISD, Lakeside, Long Lake Ranch, Long Lake Reserve, Meadow Pointe III, Meadow Pointe IV, Mitchell Ranch, New River, Riverwood Estates, Seven Oaks, **Summit View**, Talavera, The Groves, The Preserve at South Branch, The Preserve at Wilderness Lake, The Verandahs, Water's Edge, Wesbridge, Wiregrass and Wiregrass II Development Districts.

Non-Ad Valorem Calendar

- | | |
|---|--------------------|
| • Annual Fees Due (\$150 each district)* | June 1, 2021 |
| • Preliminary Certification and Certificate deadline date | July 16, 2021 |
| • Final Certification and Certificate deadline date | September 16, 2021 |

Please note: All CDD payments must be postmarked by **June 1st** in order to have the CDD information included on the TRIM Notice. Payments postmarked after June 1st will be returned and the CDD will **NOT** be included on the notice. Please send all payments to PO Box 401, Dade City, FL 33526-0401.

***Note:** This notification will serve as your invoice for payment.

Please provide our office with the Public Hearing Information, i.e., date, time, location (complete street address) and telephone number, which will be printed on the TRIM Notice. Enclosed for your use are the "Certificate to Non-Ad Valorem Assessment Roll" forms, DR-408A PRELIMINARY & DR-408A FINAL.

If you have any questions, please contact Tim Sheridan at extension 4427 or you may reach him at tsheridan@pascopa.com.

Respectfully,


Mike Wells
Pasco County Property Appraiser
352-521-4437
mwells@pascopa.com

MW/ts
Encl

Date Rec'd Rizzetta & Co., Inc. 04/07/21
D/M approval Meh Date 04/20
Date entered 04/15/21
Fund 001 GL 51300 OC 3108
Check # _____

PLEASE MAIL ALL CORRESPONDENCE TO: PASCO COUNTY PROPERTY APPRAISER - PO BOX 401, DADE CITY, FLORIDA 33526-0401

WEST PASCO GOVERNMENT CENTER
NEW PORT RICHEY
TELEPHONE: 727-847-8151

EAST PASCO GOVERNMENT CENTER
14236 6TH STREET, SUITE 101
DADE CITY, FL 33523-3411

CENTRAL PASCO PROFESSIONAL CENTER
LAND O' LAKES
TELEPHONE: 813-979-2780

Rizzetta & Company, Inc.
3434 Colwell Avenue
Suite 200
Tampa FL 33614

Invoice

Date	Invoice #
5/1/2021	INV0000058215

Bill To:

SUMMIT VIEW CDD
3434 Colwell Avenue
Suite 200
Tampa FL 33614

Services for the month of	Terms	Client Number
May	Upon Receipt	00255

Description	Qty	Rate	Amount
Administrative Services - April 3100	1.00	\$350.00	\$350.00
Administrative Services - May 3100	1.00	\$350.00	\$350.00
Accounting Services - April 3201	1.00	\$1,250.00	\$1,250.00
Accounting Services - May 3201	1.00	\$1,250.00	\$1,250.00
District Management Services - April 3101	1.00	\$1,600.00	\$1,600.00
District Management Services - May 3101	1.00	\$1,600.00	\$1,600.00
District Management Services - March 19 - 31 3101	1.00	\$619.32	\$619.32
Accounting Services - March 19 - 31 3201	1.00	\$483.84	\$483.84
Administrative Services - March 19 - 31 3100	1.00	\$135.48	\$135.48
<p>Date Rec'd Rizzetta & Co., Inc. _____</p> <p>D/M approval <u>Meh</u> Date <u>05/13</u></p> <p>Date entered <u>5/13/21</u></p> <p>Fund <u>001</u> GL <u>51300</u> OC <u>See Above</u> 51300-3100 \$835.48</p> <p>Check # _____ 51300-3101 \$3,819.32</p> <p>51300-3201 \$2,983.84</p>			
Subtotal			\$7,638.64
Total			\$7,638.64

Tampa Bay Times

tampabay.com

Times Publishing Company
DEPT 3396
PO BOX 123396
DALLAS, TX 75312-3396
Toll Free Phone: 1 (877) 321-7355
Fed Tax ID 59-0482470

ADVERTISING INVOICE

Advertising Run Dates	Advertiser Name	
02/21/21 - 02/28/21	SUMMIT VIEW CDD	
Billing Date	Sales Rep	Customer Account
02/28/2021	Deirdre Almeida	314820
Total Amount Due	Ad Number	
\$459.00	0000142922	

PAYMENT DUE UPON RECEIPT

Start	Stop	Ad Number	Product	Placement	Description PO Number	Ins.	Size	Net Amount
02/21/21	02/28/21	0000142922	Times	Legals CLS	Org Meeting and LO Election	2	2x66 L	\$455.00
02/21/21	02/28/21	0000142922	Tampabay.com	Legals CLS	Org Meeting and LO Election AffidavitMaterial	2	2x66 L	\$0.00 \$4.00

RECEIVED
MAR 10 2021
BY:

Date Rec'd Rizzetta & Co., Inc. _____
D/M approval Meh Date 04/20
Date entered 04/15/21
Fund 001 GL 51300 OC 4801
Check # _____

PLEASE DETACH AND RETURN LOWER PORTION WITH YOUR REMITTANCE

Tampa Bay Times

tampabay.com

DEPT 3396
PO BOX 123396
DALLAS, TX 75312-3396
Toll Free Phone: 1 (877) 321-7355

ADVERTISING INVOICE

Thank you for your business.

Advertising Run Dates	Advertiser Name	
02/21/21 - 02/28/21	SUMMIT VIEW CDD	
Billing Date	Sales Rep	Customer Account
02/28/2021	Deirdre Almeida	314820
Total Amount Due	Ad Number	
\$459.00	0000142922	

DO NOT SEND CASH BY MAIL

PLEASE MAKE CHECK PAYABLE TO: TIMES PUBLISHING COMPANY

REMIT TO:

SUMMIT VIEW CDD
C/O Rizzetta & Company
3434 COLWELL AVENUE SUITE 200
TAMPA, FL 33614

Times Publishing Company
DEPT 3396
PO BOX 123396
DALLAS, TX 75312-3396

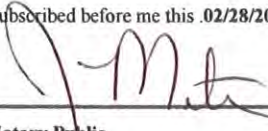
Tampa Bay Times**Published Daily**STATE OF FLORIDA
COUNTY OF PascoMAR 10 2021
BY: _____ } ss

Before the undersigned authority personally appeared **Deirdre Almeida** who on oath says that he/she is **Legal Advertising Representative** of the **Tampa Bay Times** a daily newspaper printed in St. Petersburg, in Pinellas County, Florida; that the attached copy of advertisement, being a Legal Notice in the matter **RE: Org Meeting and LO Election** was published in **Tampa Bay Times**: 2/21/21, 2/28/21 in said newspaper in the issues of **Baylink Pasco**

Affiant further says the said **Tampa Bay Times** is a newspaper published in Pasco County, Florida and that the said newspaper has heretofore been continuously published in said Pasco County, Florida each day and has been entered as a second class mail matter at the post office in said Pasco County, Florida for a period of one year next preceding the first publication of the attached copy of advertisement, and affiant further says that he/she neither paid nor promised any person, firm or corporation any discount, rebate, commission or refund for the purpose of securing this advertisement for publication in the said newspaper.



Signature Affiant

Sworn to and subscribed before me this **02/28/2021**


Signature of Notary Public

Personally known X or produced identification

Type of identification produced _____

NOTICE OF LANDOWNERS' MEETING AND ELECTION AND MEETING OF THE BOARD OF SUPERVISORS OF THE SUMMIT VIEW COMMUNITY DEVELOPMENT DISTRICT

Notice is hereby given to the public and all landowners within the Summit View Community Development District (the "District"), the location of which is generally described as comprising a parcel or parcels of land containing approximately 135.35 acres, generally located north of State Road 52 and east of Happy Hill Road, in the City of Dade City, Florida, advising that a meeting of landowners will be held for the purpose of electing five (5) persons to the District Board of Supervisors. Immediately following the landowners' meeting and election, there will be convened a meeting of the Board of Supervisors for the purpose of considering certain matters of the Board to include certifying results of the landowner election, election of certain District officers, consideration of financing related matters and other such business which may properly come before the Board.

DATE: March 19, 2021
TIME: 10:00 a.m.
PLACE: Rizzetta & Company, Inc.
5844 Old Pasco Road
Suite 100
Wesley Chapel, FL 33544

Each landowner may vote in person or by written proxy. Proxy forms may be obtained upon request at the office of the District Manager c/o Rizzetta & Company, 12750 Citrus Park Lane, Suite 115, Tampa, Florida 33625 ("District Office"). At said meeting each landowner or his or her proxy shall be entitled to nominate persons for the position of Supervisor and cast one vote per acre of land, or fractional portion thereof, owned by him or her and located within the District for each person to be elected to the position of Supervisor. A fraction of an acre shall be treated as one acre, entitling the landowner to one vote with respect thereto. Platted lots shall be counted individually and rounded up to the nearest whole acre. The acreage of platted lots shall not be aggregated for determining the number of voting units held by a landowner or a landowner's proxy. At the landowners' meeting the landowners shall select a person to serve as the meeting chair and who shall conduct the meeting.

The landowners' meeting and the Board of Supervisors meeting are open to the public and will be conducted in accordance with the provisions of Florida law. One or both of the meetings may be continued to a date, time, and place to be specified on the record at such meeting. A copy of the agenda for these meetings may be obtained from the District Office. There may be an occasion where one or more supervisors will participate by speaker telephone.

Any person requiring special accommodations to participate in these meetings is asked to contact the District Office at (Ph): 407-841-5524, at least forty-eight (48) hours before the hearing. If you are hearing or speech impaired, please contact the Florida Relay Service at 7-1-1 or (800) 955-8770 for aid in contacting the District Office.

A person who decides to appeal any decision made by the Board with respect to any matter considered at the meeting is advised that such 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.

Matthew Huber
District Manager
Run Date(s): 2-21-21 & 28-21

0000142922



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ADVERTISING INVOICE

Advertising Run Dates		Advertiser Name	
04/14/21		SUMMIT VIEW CDD	
Billing Date		Sales Rep	Customer Account
04/14/2021		Deirdre Almeida	314820
Total Amount Due		Ad Number	
\$1,263.40		0000149718	

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PAYMENT DUE UPON RECEIPT

Start	Stop	Ad Number	Product	Placement	Description PO Number	Ins.	Size	Net Amount
04/14/21	04/14/21	0000149718	Times	Legals CLS	Assessments	1	4x15.75 IN	\$1,263.40
<p>Date Rec'd Rizzetta & Co., Inc. 04/23/21</p> <p>D/M approval <u>Meh</u> Date <u>05/13</u></p> <p>Date entered 04/23/21</p> <p>Fund 001 GL 51300 OC 4801</p> <p>Check #</p>								

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04/14/21		SUMMIT VIEW CDD	
Billing Date		Sales Rep	Customer Account
04/14/2021		Deirdre Almeida	314820
Total Amount Due		Ad Number	
\$1,263.40		0000149718	

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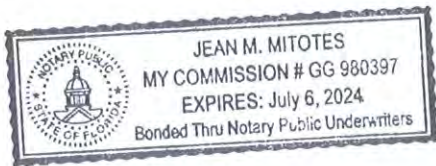
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**PURSUANT TO SECTION 170.07, FLORIDA STATUTES,
BY THE SUMMIT VIEW COMMUNITY DEVELOPMENT DISTRICT**

**NOTICE OF PUBLIC HEARING TO CONSIDER ADOPTION OF ASSESSMENT ROLL PURSUANT TO
SECTION 197.3632(4)(b), FLORIDA STATUTES,
BY THE SUMMIT VIEW COMMUNITY DEVELOPMENT DISTRICT**

NOTICE OF REGULAR MEETING OF THE SUMMIT VIEW COMMUNITY DEVELOPMENT DISTRICT

The Summit View Community Development District Board of Supervisors ("Board") will hold public hearings on **April 30, 2021 at 10:00 a.m.** at the offices of Rizzetta & Company, Inc., located at 5844 Old Pasco Road, Suite 100, Wesley Chapel, Florida 33544, to consider the adoption of an assessment roll, the imposition of special assessments to secure proposed bonds on benefited lands within the Summit View Community Development District ("District"), a depiction of which lands is shown below, and to provide for the levy, collection and enforcement of the special assessments. The streets and areas to be improved are geographically depicted below and in the District's Master Engineer's Report, dated March 17, 2021 (the "Improvement Plan"). The public hearing is being conducted pursuant to Chapters 170, 190 and 197, Florida Statutes. A description of the property to be assessed and the amount to be assessed to each piece or parcel of property may be ascertained at the office of the District's Records Office located at 5844 Old Pasco Road, Suite 100, Wesley Chapel, Florida 33544.

The District is a unit of special-purpose local government responsible for providing infrastructure improvements for lands within the District. The infrastructure improvements ("Improvements") are currently expected to include, but are not limited to, roadway improvements, stormwater management systems, water distribution systems, wastewater systems, entry landscaping, hardscaping and irrigation system improvements, and other eligible public improvements, all as more specifically described in the Improvement Plan, on file and available during normal business hours at the address provided above.

The District intends to impose assessments on benefited lands within the District in the manner set forth in the District's Master Special Assessment Allocation Report, dated March 19, 2021 (the "Assessment Report"), which is on file and available during normal business hours at the address provided above.

The purpose of any such assessment is to secure the bonds issued to fund the Improvements. As described in more detail in the Assessment Report, the District's assessments will be levied against all benefited lands within the District. The Assessment Report identifies maximum assessment amounts for each land use category that is currently expected to be assessed. The method of allocating assessments for the Improvements to be funded by the District will initially be determined on an equal assessment per acre basis, and will be levied on an equivalent assessment unit ("EAU") basis at the time that such property is platted or subject to a site plan. The costs are allocated using EAU factors, which have the effect of stratifying costs based on land use.

The annual principal assessment levied against each parcel will be based on repayment over thirty (30) years of the total debt allocated to each parcel. The District expects to collect sufficient revenues to retire no more than \$17,800,000 in debt to be assessed by the District, exclusive of fees and costs of collection or enforcement, discounts for early payment and interest. The proposed maximum annual schedule of assessments is as follows:

PRODUCT	EAU UNITS	EAU FACTOR	PRODUCT TOTAL PRINCIPAL (2)	PER UNIT PRINCIPAL	PRODUCT ANNUAL INSTLMT. (2)(3)	PER UNIT ANNUAL INSTLMT. (3)
Single Family 40'	87	0.80	\$3,138,405	\$36,051	\$217,051	\$2,495
Single Family 50'	269	1.00	\$12,122,025	\$45,063	\$838,888	\$3,119
Single Family 60'	47	1.30	\$2,541,570	\$54,078	\$175,189	\$3,742
TOTAL	403		\$17,802,000		\$1,231,825	

(1) Represents maximum assessments based on total CIP and allocated by EAU. Actual imposed amounts may be lower.
(2) Product unit shown for illustrative purposes only and are not used per product type.
(3) Includes estimated Pasco County collection and payment discounts, which may fluctuate.

The assessments may be prepaid in whole at any time, or in some instances in part, or may be paid in not more than thirty (30) annual installments subsequent to the issuance of debt to finance the improvements. These annual assessments will be collected on the Pasco County tax roll by the Tax Collector. Alternatively, the District may choose to directly collect and enforce these assessments. All affected property owners have the right to appear at the public hearings and the right to file written objections with the District within twenty (20) days of the publication of this notice.

Also on April 30, 2021 at 10:00 a.m., at offices of Rizzetta & Company, Inc., located at 5844 Old Pasco Road, Suite 100, Wesley Chapel, Florida 33544, the Board will hold a regular public meeting to consider any other business that may lawfully be considered by the District. The Board meeting and hearings are open to the public and will be conducted in accordance with the provisions of Florida law for community development districts. The Board meeting and/or the public hearings may be continued in progress to a date and time certain announced at the meeting and/or hearings.

Additional information regarding this public hearing may be obtained by contacting the District Manager, Matt Huber, at mhuber@rizzetta.com or by calling (813) 994-1001.

If anyone chooses to appeal any decision of the Board with respect to any matter considered at the meeting or hearings, such person will need a record of the proceedings and should accordingly ensure that a verbatim record of the proceedings is made, which includes the testimony and evidence upon which such appeal is to be based.

Any person requiring special accommodations at the meeting or hearings because of a disability or physical impairment should contact the District Office at (813) 933-5571 at least 48 hours prior to the meeting. If you are hearing or speech impaired, please contact the Florida Relay Service at 1-800-955-8770 for aid in contacting the District office.



SUMMIT VIEW COMMUNITY DEVELOPMENT DISTRICT

4/7, 4/14, 2021

RESOLUTION NO. 2021-03

A RESOLUTION OF THE BOARD OF SUPERVISORS OF SUMMIT VIEW COMMUNITY DEVELOPMENT DISTRICT DECLARING SPECIAL ASSESSMENTS; DESIGNATING THE NATURE AND LOCATION OF THE PROPOSED IMPROVEMENTS; DECLARING THE TOTAL ESTIMATED COST OF THE IMPROVEMENTS; THE PORTION TO BE PAID BY ASSESSMENTS, AND THE MANNER AND TIMING IN WHICH THE ASSESSMENTS ARE TO BE PAID; DESIGNATING THE LANDS UPON WHICH THE ASSESSMENTS SHALL BE LEVIED; PROVIDING FOR AN ASSESSMENT PLAT AND A PRELIMINARY ASSESSMENT ROLL; ADDRESSING THE SETTING OF PUBLIC HEARINGS; PROVIDING FOR PUBLICATION OF THIS RESOLUTION; AND ADDRESSING CONFLICTS, SEVERABILITY AND AN EFFECTIVE DATE.

WHEREAS the Summit View Community Development District ("District") is a local unit of special-purpose government organized and existing under and pursuant to Chapter 190, Florida Statutes, as amended, located entirely within the City of Dade City, Florida; and

WHEREAS the District is authorized by Chapter 190, Florida Statutes, to finance, fund, plan, establish, acquire, install, equip, operate, and/or construct certain improvements, including but not limited to transportation facilities, utility facilities, recreational facilities, and other infrastructure projects, and services necessitated by the development of, and serving lands within, the District; and

WHEREAS the District hereby determines to undertake, install, plan, establish, construct or reconstruct, enlarge or extend, equip, acquire, operate, and/or maintain the infrastructure improvements described in the District's Master Engineer's Report, dated March 17, 2021, attached hereto as **Exhibit A** and incorporated herein by reference (and the improvements contained therein, the "Project"); and

WHEREAS it is in the best interest of the District to pay all or a portion of the cost of the Project by special assessments pursuant to Chapter 190, Florida Statutes ("Assessments"); and

WHEREAS the District is empowered by Chapter 190, the Uniform Community Development District Act, Chapter 170, Supplemental and Alternative Method of Making Local Municipal Improvements, and Chapter 197, the Uniform Method for the Levy, Collection and Enforcement of Non-Ad Valorem Assessments, Florida Statutes, to finance, fund, plan, establish, acquire, construct or reconstruct, enlarge or extend, equip, operate, and maintain the Project and to impose, levy and collect the Assessments; and

WHEREAS as set forth in the Master Special Assessment Allocation Report, dated March 19, 2021, attached hereto as **Exhibit B** and incorporated herein by reference and on file at Rizzetta & Company, Inc., 5844 Old Pasco Road, Suite 100, Wesley Chapel, Florida 33544 (District Records Office), the District hereby finds and determines that:

(i) benefits from the Project will accrue to the property improved;
(ii) the amount of those benefits will exceed the amount of the Assessments; and
(iii) the Assessments are fairly and reasonably allocated.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF THE DISTRICT THAT:

1. AUTHORITY FOR THIS RESOLUTION; INCORPORATION OF RECITALS. This Resolution is adopted pursuant to the provisions of Florida law, including without limitation Chapters 170, 190 and 197, Florida Statutes. The recitals stated above are incorporated herein and are adopted by the Board as true and correct statements.

2. DECLARATION OF ASSESSMENTS. The Board hereby declares that it has determined to undertake all or a portion of the Project and to defray all or a portion of the cost thereof by the Assessments.

3. DESIGNATING THE NATURE AND LOCATION OF IMPROVEMENTS. The nature and general location of the plans and specifications for the Project are described in **Exhibit A**, which is on file at the District Records Office. **Exhibit B** is also on file and available for public inspection at the same location.

4. DECLARING THE TOTAL ESTIMATED COST OF THE PROJECT, THE PORTION TO BE PAID BY ASSESSMENTS, AND THE MANNER AND TIMING IN WHICH THE ASSESSMENTS ARE TO BE PAID.

A. The total estimated construction cost of the Project is \$14,101,796.37 ("Estimated Cost").

B. The Assessments will defray approximately \$14,775,000, which is the anticipated maximum par value of any bonds and which includes all or a portion of the Estimated Cost, as well as other financing-related costs, as set forth in **Exhibit B**.

C. The manner in which the Assessments shall be apportioned and paid as set forth in **Exhibit B**, as may be modified by supplemental assessment resolutions. Commencing with the years in which the Assessments are certified for collection, the Assessments shall each be paid in not more than thirty (30) annual installments. The Assessments may be payable at the same time and in the same manner as are ad valorem taxes and collected pursuant to Chapter 197, Florida Statutes; provided, however, that in the event the uniform non-ad valorem assessment method of collecting the Assessments is not available to the District in any year, or if determined by the District to be in its best interest, the Assessments may be collected as otherwise permitted by law, including but not limited to by direct bill. The decision to collect 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 2 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.

5. DESIGNATING THE LANDS UPON WHICH THE ASSESSMENTS SHALL BE LEVIED. The Assessments shall be levied, within the District, on all lots and lands adjoining and contiguous or bounding and abutting upon such improvements or specially benefited thereby and further designated by the assessment plat hereinafter provided for.

6. ASSESSMENT PLAT. Pursuant to Section 170.04, Florida Statutes, there is on file at the District Records Office, an assessment plat showing the area to be assessed, with certain plans and specifications describing the Project and the estimated cost of the Project, all of which are open to inspection by the public.

7. PRELIMINARY ASSESSMENT ROLL. Pursuant to Section 170.06, Florida Statutes, the District Manager has caused to be made a preliminary assessment roll, in accordance with the method of assessment described in **Exhibit B** hereto, which shows the lots and lands assessed, the amount of benefit to and the assessment against each lot or parcel of land and the number of annual installments into which the assessment may be divided, which assessment roll is hereby adopted and approved as the District's preliminary assessment roll.

8. PUBLIC HEARINGS DECLARED; DIRECTION TO PROVIDE NOTICE OF THE HEARINGS. Pursuant to Sections 170.07 and 197.3632(4)(b), Florida Statutes, among other provisions of Florida law, there are hereby declared two (2) public hearings to be held as follows:

NOTICE OF PUBLIC HEARINGS
DATE: April 30, 2021
TIME: 10:00 a.m.

LOCATION: Offices of Rizzetta & Company, Inc.,
5844 Old Pasco Road, Suite 100
Wesley Chapel, FL 33544

The purpose of the public hearings is to hear comment and objections to the proposed special assessment program for District improvements as identified in the preliminary assessment roll, a copy of which is on file and as set forth in **Exhibit B**. Interested parties may appear at that hearing or submit their comments in writing prior to the hearings at the District Records Office.

Notice of said hearings shall be advertised in accordance with Chapters 170, 190 and 197, Florida Statutes, and the District Manager is hereby authorized and directed to place said notice in a newspaper of general circulation within Pasco County (by two (2) publications one (1) week apart with the first publication at least twenty (20) days prior to the date of the hearing established herein). The District Manager shall file a publisher's affidavit with the District Secretary verifying such publication of notice. The District Manager is further authorized and directed to give thirty (30) days written notice by mail of the time and place of this hearing to the owners of all property to be assessed and include in such notice the amount of the assessment for each such property owner, a description of the areas to be improved and notice that information concerning all assessments may be ascertained at the District Records Office. The District Manager shall file proof of such mailing by affidavit with the District Secretary.

9. PUBLICATION OF RESOLUTION. Pursuant to Section 170.05, Florida Statutes, the District Manager is hereby directed to cause this Resolution to be published twice (once a week for two (2) weeks) in a newspaper of general circulation within Pasco County and to provide such other notice as may be required by law or desired in the best interests of the District.

10. CONFLICTS. All resolutions or parts thereof in conflict herewith are, to the extent of such conflict, superseded and repealed.

11. SEVERABILITY. If any section or part of a section of this Resolution is declared invalid or unconstitutional, the validity, force, and effect of any other section or part of a section of this Resolution shall not thereby be affected or impaired unless it clearly appears that such other section or part of a section of this Resolution is wholly or necessarily dependent upon the section or part of a section so held to be invalid or unconstitutional.

12. EFFECTIVE DATE. This Resolution shall become effective upon its adoption.

Passed and Adopted on March 19, 2021.

ATTEST:

[Signature]
Secretary

SUMMIT VIEW COMMUNITY DEVELOPMENT DISTRICT

[Signature]
Vice Chairman, Board of Supervisors

Exhibit A: Master Engineer's Report, dated March 17, 2021
Exhibit B: Master Special Assessment Allocation Report, dated March 19, 2021

0000149718-01

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Advertising Run Dates	Advertiser Name	
04/21/21	SUMMIT VIEW CDD	
Billing Date	Sales Rep	Customer Account
04/21/2021	Deirdre Almeida	314820
Total Amount Due		Ad Number
\$109.60		0000149794

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MAY - 5 2021

PAYMENT DUE UPON RECEIPT

Start	Stop	Ad Number	Product	Placement	Description PO Number	Ins.	Size	Net Amount
04/21/21	04/21/21	0000149794	Times	Legals CLS	Meetings	1	2x45 L	\$105.60
04/21/21	04/21/21	0000149794	Tampabay.com	Legals CLS	Meetings AffidavitMaterial	1	2x45 L	\$0.00 \$4.00

Date Rec'd Rizzetta & Co., Inc. 05/19/21

D/M approval Meh Date 05/19

Date entered 05/19/21

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Billing Date	Sales Rep	Customer Account
04/21/2021	Deirdre Almeida	314820
Total Amount Due		Ad Number
\$109.60		0000149794

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COUNTY OF Pasco

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Before the undersigned authority personally appeared **Deirdre Almeida** who on oath says that he/she is **Legal Advertising Representative** of the **Tampa Bay Times** a daily newspaper printed in St. Petersburg, in Pinellas County, Florida; that the attached copy of advertisement, being a Legal Notice in the matter **RE: Meetings** was published in **Tampa Bay Times: 4/21/21** in said newspaper in the issues of **Baylink Pasco**

Affiant further says the said **Tampa Bay Times** is a newspaper published in Pasco County, Florida and that the said newspaper has heretofore been continuously published in said Pasco County, Florida each day and has been entered as a second class mail matter at the post office in said Pasco County, Florida for a period of one year next preceding the first publication of the attached copy of advertisement, and affiant further says that he/she neither paid nor promised any person, firm or corporation any discount, rebate, commission or refund for the purpose of securing this advertisement for publication in the said newspaper.



Signature Affiant

Sworn to and subscribed before me this 04/21/2021

M. L. L.

Signature of Notary Public

Personally known X or produced identification

Type of identification produced _____

**NOTICE OF PUBLIC MEETING DATES
SUMMIT VIEW COMMUNITY DEVELOPMENT DISTRICT**

The Board of Supervisors of the Summit View Community Development District will hold their regular monthly meetings for the remainder of Fiscal Year 2020/2021 at 10:00 a.m. at the office of Rizzetta & Company, Inc., located at 5844 Old Pasco Road, Suite 100, Wesley Chapel, FL 33544 on the dates as follows:

April 30, 2021
May 21, 2021
June 18, 2021
July 16, 2021
August 20, 2021
September 17, 2021

There may be occasions when one or more Supervisors will participate by telephone. At the above location will be present a speaker telephone so that any interested person can attend the meeting at the above location and be fully informed of the discussions taking place either in person or by telephone communication.

Pursuant to provisions of the Americans with Disabilities Act, any person requiring special accommodations to participate in these meetings is asked to advise the District Office at (813) 994-1001, at least 48 hours before the meetings. If you are hearing or speech impaired, please contact the Florida Relay Service at (800) 955-8770, who can aid you in contacting the District Office.

Each person who decides to appeal any decision made by the Board with respect to any matter considered at the meeting is advised that person may need to ensure that a verbatim record of the proceedings is made, including the testimony and evidence upon which such appeal is to be based.

Matthew Huber
District Manager

Run Date: 4-21-21

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Billing Date	Sales Rep	Customer Account
04/21/2021	Jean Mitotes	314820
Total Amount Due	Ad Number	
\$186.40	0000150399	

PAYMENT DUE UPON RECEIPT

Start	Stop	Ad Number	Product	Placement	Description PO Number	Ins.	Size	Net Amount
04/21/21	04/21/21	0000150399	Times	Legals CLS	Notice of Rule Development	1	2x77 L	\$182.40
04/21/21	04/21/21	0000150399	Tampabay.com	Legals CLS	Notice of Rule Development	1	2x77 L	\$0.00
					AffidavitMaterial			\$4.00

Date Rec'd Rizzetta & Co., Inc. 05/18/21

D/M approval Meh Date 05/19

Date entered 05/19/21

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Billing Date	Sales Rep	Customer Account
04/21/2021	Jean Mitotes	314820
Total Amount Due	Ad Number	
\$186.40	0000150399	

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APR 29 2021

Advertising Run Dates	Advertiser Name	
04/18/21	SUMMIT VIEW CDD	
Billing Date	Sales Rep	Customer Account
04/19/2021	Jean Mitotes	314820
Total Amount Due	Ad Number	
\$165.00	0000150402	

PAYMENT DUE UPON RECEIPT

Start	Stop	Ad Number	Product	Placement	Description PO Number	Ins.	Size	Net Amount
04/18/21	04/18/21	0000150402	Times	Legals CLS	Notice of Rule Development	1	2x47 L	\$161.00
04/18/21	04/18/21	0000150402	Tampabay.com	Legals CLS	Notice of Rule Development AffidavitMaterial	1	2x47 L	\$0.00 \$4.00

Date Rec'd Rizzetta & Co., Inc. 05/18/21

D/M approval Meh Date 05/19

Date entered 05/18/21

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\$165.00	0000150402	

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C/O Rizzetta & Company
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Fed Tax ID 59-0482470

ADVERTISING INVOICE

Advertising Run Dates	Advertiser Name	
04/25/21	SUMMIT VIEW CDD	
Billing Date	Sales Rep	Customer Account
04/25/2021	Jean Mitotes	314820
Total Amount Due	Ad Number	
\$305.00	0000150404	

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PAYMENT DUE UPON RECEIPT

Start	Stop	Ad Number	Product	Placement	Description PO Number	Ins.	Size	Net Amount
04/25/21	04/25/21	0000150404	Times	Legals CLS	RFQ for District Engineering Services	1	2x87 L	\$301.00
04/25/21	04/25/21	0000150404	Tampabay.com	Legals CLS	RFQ for District Engineering Services	1	2x87 L	\$0.00
					AffidavitMaterial			\$4.00

Date Rec'd Rizzetta & Co., Inc. 05/19/21

D/M approval Meh Date 05/19

Date entered 05/19/21

Fund 001 GL 51300 OC 4801

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Before the undersigned authority personally appeared **Jean Mitotes** who on oath says that he/she is **Legal Advertising Representative** of the **Tampa Bay Times** a daily newspaper printed in St. Petersburg, in Pinellas County, Florida; that the attached copy of advertisement, being a Legal Notice in the matter **RE: RFQ for District Engineering Services** was published in **Tampa Bay Times: 4/25/21** in said newspaper in the issues of **Baylink Pasco**

Affiant further says the said **Tampa Bay Times** is a newspaper published in Pasco County, Florida and that the said newspaper has heretofore been continuously published in said Pasco County, Florida each day and has been entered as a second class mail matter at the post office in said Pasco County, Florida for a period of one year next preceding the first publication of the attached copy of advertisement, and affiant further says that he/she neither paid not promised any person, firm or corporation any discount, rebate, commission or refund for the purpose of securing this advertisement for publication in the said newspaper.



Signature Affiant

Sworn to and subscribed before me this **04/25/2021**



Signature of Notary Public

Personally known X or produced identification

Type of identification produced _____



JESSICA ATTARD
Commission # GG 308686
Expires March 28, 2023
Bonded Thru Budget Notary Services

**REQUEST FOR QUALIFICATIONS FOR ENGINEERING SERVICES
FOR THE SUMMIT VIEW COMMUNITY DEVELOPMENT****DISTRICT**

RFQ for Engineering Services

The Summit View Community Development District ("District"), located in Dade City, Florida, announces that professional engineering services will be required on a continuing basis for the District's anticipated capital improvements which may include work related to roadway facilities, utility facilities, stormwater facilities, and recreational facilities, and all other public improvements authorized by Chapter 190, Florida Statutes. The engineering firm selected will act in the general capacity of District Engineer and provide District engineering services, as required.

Any firm or individual ("Applicant") desiring to provide professional services to the District must: 1) hold applicable federal, state and local licenses; 2) be authorized to do business in Florida in accordance with Florida law; and 3) furnish a statement ("Qualification Statement") of its qualifications and past experience on U.S. General Service Administration's "Architect-Engineer Qualifications, Standard Form No. 330," with pertinent supporting data. Among other things, Applicants must submit information relating to: a) the ability and adequacy of the Applicant's professional personnel; b) whether the Applicant is a certified minority business enterprise; c) the Applicant's willingness to meet time and budget requirements; d) the Applicant's past experience and performance, including but not limited to, past experience as a District Engineer for any community development district(s) and past experience with Dade City or Pasco County; e) the geographic location of the Applicant's headquarters and offices; and f) the current and projected workloads of the Applicant. Further, each Applicant must identify the specific individual affiliated with the Applicant who is anticipated to handle District meetings, construction services, and other engineering tasks.

The District will review all Applicants and will comply with Florida law, including the Consultant's Competitive Negotiations Act, Chapter 287, Florida Statutes ("CCNA"). All applicants interested must submit one original and one electronic version of Standard Form No. 330 and Qualification Statement by 12:00 p.m. on May 14, 2021 to the attention of Mr. Matt Huber, c/o Rizzetta & Company, Inc., 12750 Citrus Park Drive, Suite 115, Tampa, FL 33625 ("District Manager's Office").

The Board shall select and rank the Applicants using the requirements set forth in the CCNA and the evaluation criteria on file with the District Manager, and the highest ranked Applicant will be requested to enter into contract negotiations. If an agreement cannot be reached between the District and the highest ranked Applicant, negotiations will cease and begin with the next highest ranked Applicant, and if these negotiations are unsuccessful, will continue to the third highest ranked Applicant and so on.

The District reserves the right to reject any and all Qualification Statements. Additionally, there is no express or implied obligation for the District to reimburse Applicants for any expenses associated with the preparation and submittal of the Qualification Statements in response to this request.

Any protest regarding the terms of this Notice, or the evaluation criteria on file with the District Manager, must be filed in writing, within seventy-two (72) hours (excluding weekends) after the publication of this Notice. The formal protest setting forth with particularity the facts and law upon which the protest is based shall be filed within seven (7) calendar days after the initial notice of protest was filed pursuant to the District's Rules of Procedure. Failure to timely file a notice of protest or failure to timely file a formal written protest shall constitute a waiver of any right to object or protest with respect to aforesaid Notice or evaluation criteria provisions. Any person who files a notice of protest shall provide to the District, simultaneous with the filing of the notice, a protest bond with a responsible surety to be approved by the District and in the amount of Ten Thousand Dollars (\$10,000.00). Additional information and requirements regarding protests are set forth in the District's Rules of Procedure, which are available from the District Manager.

Publish on April 25, 2021

0000150404

Tab 5



MBS CAPITAL MARKETS, LLC

May 26, 2021

Board of Supervisors
Summit View Community Development District
C/O: Scott Brizendine
Rizzetta & Company, Inc.
12750 Citrus Park Lane | Suite 115
Tampa, Florida 33625

Via: email to sbrizendine@rizzetta.com

MBS Capital Markets, LLC (the "Underwriter") is providing this letter to confirm that on May 26th, 2021 we sent an email to Dr. Douglas Weiland, the Developer indicating that we would waive the 90-day notice requirement of Section 3 regarding Termination of our Investment Banking Agreement executed on March 19th, 2021 with the Summit View Community Development District (the "District").

The compensation section of the Investment Banking Agreement is as follows:

Section 2 Fees: The Underwriter will be responsible for its own out-of-pocket expenses other than the fees and disbursements of underwriter's or disclosure counsel which fees shall be paid from the proceeds of the Bonds. Any fees payable to the Underwriter will be contingent upon the successful sale and delivery or placement of the Bonds. The underwriting fee for the sale or placement of the Bonds will be 2% of the par amount of Bonds issued.

I am confirming that any fee or expense reimbursement is contingent upon a successful sale of the bonds and we acknowledge we have no claim for fees or expenses for services provided to the District.

Sincerely,
MBS Capital Markets, LLC

Edwin Bulleit

Edwin M Bulleit
Managing Partner

Member: FINRA/SIPC

3414 W. BAY TO BAY BLVD., UNIT #3,
TAMPA, FLORIDA 33629
PHONE: 813.281.2700

152 LINCOLN AVENUE
WINTER PARK, FLORIDA 32789
PHONE: 407.622.0130

1005 BRADFORD WAY
KINGSTON, TENNESSEE 37763
PHONE: 865.717.0303

Tab 6

fmsbonds
Municipal Bond Specialists

20660 W. Dixie Highway
North Miami Beach, FL 33180

May 28, 2021

Summit View Community Development District
c/o Rizzetta & Company
12750 Citrus Park Lane, Suite # 15
Tampa, Florida 33625
Attention: Mr. Matthew E. Huber

Re: Agreement for Underwriter Services & Rule G-17 Disclosure

Dear Mr. Huber:

Thank you for the opportunity to work with the Summit View South Community Development District (the "Issuer") regarding the underwriting of the Issuer's Special Assessment Bonds, Series 2021 and future series of bonds (the "Bonds"). The Issuer and FMSbonds, Inc. ("FMS"), solely in its capacity as Underwriter, agree to the proposed terms set forth herein in Attachment I. By executing this letter both parties agree to the terms set forth herein.

FMS's role is limited to act as Underwriter within the Scope of Services set forth herein as Attachment I, and not as a financial advisor or municipal advisor. FMS is not acting as a municipal advisor for the developer in connection with the subject transaction. Any information that FMS has previously provided was solely for discussion purposes in anticipation of being retained as your underwriter. Attachment II, attached hereto, contains the Municipal Securities Rulemaking Board (MSRB) Rule G-17 Disclosure, as set forth in the amended and restated MSRB Notice 2019-20 (November 8, 2019)¹ (the "Notice"). We ask that you provide this letter to the appropriate person at the Issuer if you are not so authorized.

We look forward to working with you.

Yours truly,

FMSbonds, Inc.

By: 

Name: Jon Kessler

Title: Executive Director

Agreed to and accepted as of the date first written above:

SUMMIT VIEW COMMUNITY DEVELOPMENT DISTRICT

By: _____
Name: _____
Title: _____

¹ Interpretive Notice Concerning the Application of MSRB Rule G-17 to underwriters and Underwriters of Municipal Securities (effective March 31, 2021).

ATTACHMENT I

Section 1 Scope of Services of FMS: FMS proposes that its duties as Underwriter shall be limited to the following:

1. To provide advice to the Issuer on the structure, timing and terms of the Bonds;
2. To coordinate the financing process;
3. To conduct due diligence;
4. To assist in the preparation of an offering memorandum;
5. To review the assessment methodology and Bond documents;
6. To market and offer Bonds to investors.

Section 2 Terms and Conditions:

1. Underwriter Fee ("Underwriting Fee"). FMS shall act as sole lead underwriter. The Underwriting Fee to FMS for acting as Underwriter shall be 2% of the Par Amount of any Bonds issued. The Underwriting Fee shall be due and payable only upon the closing of the Bonds. The Underwriting Fee may be modified pursuant to a bond delegation or award resolution approved by the Board and consented to by the Underwriter.
2. Price and Interest Rates: The offering price and interest rates are expected to be based on recent comparable transactions in the market, if any. FMS and the Issuer will jointly determine the offering price and interest rates immediately prior to the start of the order period, based on market conditions then prevailing.
3. Bond Purchase Agreement. The obligations of the Underwriter and those of the Issuer would be subject to the satisfactory completion of due diligence and to the customary representations, warranties, covenants, conditions, including provisions respecting its termination contained in the form of a bond purchase agreement FMS will prepare and as generally used in connection with the offering of Bonds for this type of transaction.
4. Costs of Issuance. The Issuer shall be responsible for the payment of all expenses relating to the offering, including but not limited to, attorney fees, consultant fees, costs associated with preparing offering documents, if any, the purchase agreement, regulatory fees and filing fees and expenses for qualification under blue sky laws designated by FMS and approved by the Issuer.
5. Assumptions. The proposed terms and statements of intention set forth in this agreement are based on information currently available to FMS about the Issuer and the market for special assessment bonds similar to the Bonds and the assumptions that:

- a) the financial condition and history of the project shall be substantially as understood, and the financial information for the relevant and appropriate period ended to be included in the final offering memorandum will not vary materially from those set forth in the material furnished to FMS;
 - b) no adverse developments shall occur which materially and adversely affect the underlying security and financial condition of the Issuer;
 - c) the offering memorandum will comply with all applicable laws and regulations;
 - d) there will not be any unanticipated substantial delays on the part of the Issuer in completing the transaction; and
 - e) all conditions of the Underwriter to purchase Bonds will be included in the bond purchase agreement and conditions shall be satisfied or waived, in the sole discretion of the Underwriter.
6. Information. The Issuer agrees to reasonably and actively assist FMS in achieving an underwriting that is satisfactory to FMS and the Issuer. To assist FMS in the underwriting the Issuer will (a) provide and cause the Issuer's staff and its professionals to provide FMS upon request with all information reasonably deemed necessary by FMS to complete the underwritings, included but not limited to, information and evaluations prepared by the Issuer and its advisors; and (b) otherwise assist FMS in its underwriting efforts.
7. Term of Engagement. The term of this Agreement shall commence as of the date of this Agreement and continue in full force and effect unless terminated by either party. In event of termination by the Issuer without cause, FMS shall be entitled to recover its reasonable out of pocket expenses incurred up to the date of termination.
8. No Commitment. Notwithstanding the foregoing, nothing herein shall constitute an agreement to provide a firm commitment, underwriting or placement or arrangement of any securities by FMS or its affiliates. Any such commitment, placement or arrangement shall only be made a part of an underwriting agreement or purchase agreement at the time of the sale of the bonds.

The engagement contemplated hereby and this agreement are solely for the benefit of the Issuer and FMS and their respective successors, assigns and representatives and no other person or entity shall acquire or have any right under or by virtue hereof.

This Agreement contains the entire understanding of the parties relating to the transactions contemplated hereby and this Agreement supersedes all prior agreements, understandings and negotiations with respect thereto. This Agreement may be executed in counterparts each of which shall be an original but all of such counterparts shall constitute one and the same instrument.

9. No Financial Advisor. FMS's role is limited to that of an Underwriter and not a Financial Advisor or Municipal Advisor.

ATTACHMENT II

MSRB Rule G-17 Disclosure --- The Issuer recognizes that FMSbonds, Inc. will serve as the underwriter (the "Underwriter") and not as a financial advisor or municipal advisor, in connection with the issuance of the bonds relating to this financing (herein, the "Bonds"). As part of our services as Underwriter, FMSbonds, Inc. may provide advice concerning the structure, timing, terms, and other similar matters concerning the issuance of the Bonds. Any such advice, if given, will be provided by FMSbonds, Inc. as Underwriter and not as your financial advisor in this transaction. The Issuer may choose to engage the services of a municipal advisor with a fiduciary obligation to represent the Issuer's interest in this transaction.

Pursuant to the Notice, we are required by the MSRB to advise you that:

- MSRB Rule G-17 requires a broker to deal fairly at all times with both municipal issuers and investors.
- The Underwriter's primary role is to purchase the Bonds in an arm's-length commercial transaction with the Issuer. As such, the Underwriter has financial and other interests that differ from those of the Issuer.
- Unlike a municipal advisor, the Underwriter does not have a fiduciary duty to the Issuer under the federal securities laws and is, therefore, not required by federal law to act in the best interests of the Issuer without regard to its own financial or other interests.
- The Underwriter has a duty to purchase the Bonds from the Issuer at a fair and reasonable price, but must balance that duty with its duty to use its best efforts to resell the Bonds with purchases at prices that are fair and reasonable.
- The Bonds may be sold into a trust either at the time of issuance or subsequent to issuance. In such instance FMSbonds, Inc., not in its capacity of Underwriter, may participate in such trust arrangement by performing certain administrative roles. Any compensation paid to FMSbonds, Inc. would not be derived from the proceeds of the Bonds or from the revenues pledged thereunder.

The Underwriter will be compensated by a fee paid by the borrower or other third parties. Payment or receipt of the Underwriter's compensation will be contingent on the closing of the transaction. The Issuer acknowledges that the fee to be paid to the Underwriter will not be derived from the proceeds of the Bonds. While this form of compensation is customary in the municipal securities market, it presents a conflict of interest since an Underwriter may have an incentive to recommend a transaction that is unnecessary or to recommend that the size of a transaction be larger than is necessary. The Issuer acknowledges no such recommendation has been made by the Underwriter.

Please note nothing in this letter is an expressed or an implied commitment by us to provide financing or to place or purchase the Bonds or any other securities. Any such commitment shall

only be set forth in a bond purchase contract or other appropriate form of agreement for the type of transaction undertaken by you.

Further, our participation in any transaction (contemplated herein or otherwise) remains subject to, among other things, the execution of a bond purchase contract (or other appropriate form of agreement), further internal review and approvals, satisfactory completion of our due diligence investigation and market conditions.

FMSbonds, Inc. is acting independently in seeking to act as Underwriter in the transaction contemplated herein and shall not be deemed for any purpose to be acting as an agent, joint venturer or partner of any other principal involved in the proposed financing. FMSbonds, Inc. assumes no responsibility, express or implied, for any actions or omissions of, or the performance of services by, the purchasers or any other brokers in connection with the transactions contemplated herein or otherwise.

If you or any other representative of the Issuer have any questions or concerns about these disclosures, please make those questions or concerns known immediately to the undersigned. In addition, you should consult with your own financial, municipal, legal, accounting, tax and other advisors, as applicable, to the extent deemed appropriate.

We request that the person at the Issuer who has the authority to bind the Issuer (herein, "Authorized Issuer Representative") by contract with us acknowledge this letter and that such person is not a party to any conflict of interest relating to the subject transaction. If our understanding is incorrect, please notify the undersigned immediately.

The MSRB requires that we seek the Issuer's acknowledgement that it has received this letter. Accordingly, please cause the attached to be signed by the Authorized Issuer Representative and return the enclosed copy of this letter to the undersigned at the address set forth below as soon as practicable. Depending on the structure of the transaction that the Issuer decides to pursue, or if additional actual or perceived material conflicts are identified, we may be required to send you additional disclosures. At that time, we also will seek your acknowledgement of receipt of any such additional disclosures.

We look forward to working with you in connection with the issuance of the Bonds, and we appreciate the opportunity to assist you in this transaction. Thank you.

Tab 7

SUPPLEMENTAL REPORT NO. 1

TO

**AMENDED AND RESTATED
MASTER ENGINEER'S REPORT DATED JUNE 2, 2021
FOR THE
SUMMIT VIEW COMMUNITY DEVELOPMENT DISTRICT
13350 HAPPY HILL ROAD, DADE CITY, FL 33525**

PREPARED FOR:

BOARD OF SUPERVISORS
SUMMIT VIEW COMMUNITY DEVELOPMENT DISTRICT

ENGINEER:



3030 Starkey Boulevard
Trinity, Florida 34655

June 17, 2021

SUMMIT VIEW COMMUNITY DEVELOPMENT DISTRICT

AMENDED AND RESTATED MASTER ENGINEER'S REPORT

1. INTRODUCTION

The purpose of this report is to provide a description of the Capital Improvement Plan (“**CIP**”), and estimated costs of the CIP (as set forth in Appendix A hereto), for the Summit View Community Development District (“**District**” or “**CDD**”). The District was established on July 12, 2005 by the City Commission of the City of Dade City, pursuant to Ordinance 2005-0894. The Developer of the project within the District is Summit View LLC (the “**Developer**”), who is the current sole owner of the land of the District (Exhibit A below).

The CIP, as described herein, contains improvements that are within the scope of the “Projects” defined in the Final Judgment entered on September 21, 2005 by the Circuit Court of the Sixth Judicial Circuit in *Summit View Community Development District v. The State of Florida, et al.*, Case No. 51-2005-CA002129 ES, Section B.

The District will be divided into two (2) phases. This Supplemental Report will be for Phase 1 only.

2. GENERAL SITE DESCRIPTION

The site is 135.35 acres located within the City of Dade City (the “**City**”) and lies entirely in Section 32, Township 24 South, Range 21. The site is approximately 1 mile ± north of State Road 52 on the east side of Happy Hill Road. The project consists of 396 Single-Family Residential Units, 59.31 acres of Residential Development, 21.75 acres of District Roads, 3.24 acres of Recreational Facilities, and 51.05 acres of Storm Management Ponds and Open Space.

As noted in **Exhibit A**, the District’s boundaries include approximately 135.35 acres of land located in the City.

3. PROPOSED PROJECT

The CIP is intended to provide public infrastructure improvements for the lands within the District, which lands are planned for 396 single-family residential units. Phase 1 encompasses 73.77 acres and will consist of 185 single family lots located in Phase 1A and 2B (the “2021 Project Area”).

The proposed site plan for the District is attached as **Exhibit B** to this report, and the plan enumerates the proposed lot count, by type. A legal description is attached hereto as **Exhibit C**.

The CIP includes the following infrastructure categories:

Roadway Improvements

The CIP includes subdivision roads within the District. Generally, all roads will be 2-lane un-divided roads with periodic roundabouts. Such roads include the roadway asphalt, base, and subgrade, roadway curb and gutter, striping and signage and sidewalks within rights-of-way abutting non-lot lands. Sidewalks abutting lots will be constructed by the homebuilders owned and maintained by the CDD. All roads will be designed in accordance with City standards.

Stormwater Management System

The stormwater collection and outfall system are a combination of roadway curbs, curb inlets, pipe, control structures and open ponds designed to treat and attenuate stormwater runoff from District lands. The stormwater system within the project discharges to on site retention ponds. The stormwater system will be designed consistent with the criteria established by the Southwest Florida Water Management District (“SWFWMD”) and the City for stormwater/floodplain management systems. The District will finance, own, operate and maintain the stormwater system, including inlets and storm sewer systems within the right-of-way. A portion of the stormwater improvements were constructed in 2018 by the Developer and are being acquired by the District.

Water and Wastewater Utilities

As part of the CIP, the District intends to construct and/or acquire water and wastewater infrastructure. In particular, the on-site water supply improvements include water mains that will be located within rights-of-way and used for potable water service and fire protection.

The water and wastewater collection systems for all phases will be completed by the District and then dedicated to the City for operation and maintenance.

Hardscape and Landscape

The District will construct and/or install landscaping and hardscaping within District common areas and rights-of-way. The hardscaping will consist of entry features and landscaping.

Installation, operation, and maintenance of any irrigation system will be the responsibility of the Homeowners’ Association.

All such landscaping and hardscaping will be owned, maintained, and funded by the District. Such infrastructure shall be within the rights-of-way owned by the CDD, and maintained by the CDD in order to be funded by the CDD.

Undergrounding of Electrical Utility Lines

The CIP does, however, include the undergrounding of electrical utility lines within right-of-way utility easements throughout the community, which is a requirement within the City. Any lines and transformers located in such areas would be owned by Tampa Electric Company and not paid for by the District as part of the CIP.

Recreational Amenities

In conjunction with the construction of the CIP, the District intends to construct walking trails throughout the District.

The District is not anticipated to finance additional amenities, parks, and other common areas for the benefit of the District (“Non CDD Amenity Improvements”). These Non CDD Amenity Improvements will be funded and, are anticipated to be owned, by the Homeowners’ association for ownership, operation, and maintenance.

Professional Services

The CIP also includes various professional services. These include: (i) engineering, surveying, architectural and legal fees associated with the CIP, (ii) permitting and plan review costs, and (iii) development/construction management services fees that are required for the design, permitting, construction, and maintenance acceptance of the public improvements and community facilities.

Off-Site Improvements

All roadway, water, wastewater, and stormwater system components associated with the improvements along Happy Hill Road and Roth Lane are considered off-site improvements and are included within this category of improvement expected to be financed by the District.

As noted, the District’s CIP functions as a system of improvements benefitting all lands within the District.

The following table shows who will finance, own and operate the various improvements of the CIP:

TABLE A

<u>Facility Description</u>	<u>Ownership</u>	<u>O&M Entity</u>
Roadways	CDD	CDD
Stormwater Management	CDD	CDD
Utilities (Water and Sewer)	City	City
Hardscape/Landscape	CDD	CDD
Undergrounding of Conduit	CDD	CDD
Off-Site Improvements	City	City

4. PERMITTING/CONSTRUCTION COMMENCEMENT

All necessary permits for the construction of the CIP have either been obtained or are currently under review by respective governmental authorities, and include the following:

	<u>Approved</u>	<u>Expiration</u>
Dade City Zoning Ordinance No.: 2020-23	December 8, 2020	N/A
Dade City Land Use Ord. 2005-0888	October 25, 2005	N/A
Dade City PUD Rezoning Ord. 2005-0905 Amended	January 10, 2006 December 8, 2021	PD-H1 N/A
Dade City Prel. Dev. Plan 03/16/2005	August 31, 2018	N/A
Dade City Mass Grading Plan 11/14/2007	August 31, 2018	Same as SWFWMD
Dade City Phase 2B Final Subdivision Plat	Pending	
Dade City Ph. I & II Const. Plans 11/14/2007 As revised by plans to be submitted by 3/5/2021	Confirmed	N/A
Dade City Offsite Utilities	September 2018	N/A
Pasco R/W Exist. 01/11/2006, 12/20/2007	August 19, 2014	N/A
SWFWMD ERP 44030817.000 Mining	September 16, 2006	September 19, 2011
SWFWMD ERP 44030817.007 (Ext of .000)	August 28, 2014	August 28, 2019
44030817.016 (Ext of .007)	June 27, 2019	January 25, 2022
44030817.025 (Ext of .016)	January 16, 2020	August 16, 2022
SWFWMD ERP 44030817.002 Letter Mod	December 4, 2006	December 4, 2011
SWFWMD ERP 44030817.003 Phase 2	August 23, 2007	August 23, 2012
SWFWMD ERP 44030817.004 Phase 1	August 23, 2007	August 23, 2012
SWFWMD ERP 44030817.008 (Ext of .002)	August 28, 2014	August 28, 2019
44030817.017 (Ext of .008)	June 27, 2019	January 25, 2022
44030817.026 (Ext of .017)	January 16, 2020	August 16, 2022
SWFWMD ERP 44030817.006 Letter Mod	May 6, 2009	September 19, 2011
SWFWMD ERP 44030817.011 (Ext of .006)	August 28, 2014	August 28, 2019
44030817.019 (Ext of .011)	June 27, 2019	January 25, 2022
SWFWMD ERP 44030817.009 (Ext of .003)	August 28, 2014	August 28, 2019
44030817.020(Ext of .009)	June 27, 2019	January 25, 2022
44030817.024(Ext of .020)	January 16, 2020	August 16, 2022

		<u>Approved</u>	<u>Expiration</u>
SWFWMD ERP	44030817.010 (Ext of .004)	August 28, 2014	August 28, 2019
	44030817.021 (Ext of .010)	June 27, 2019	January 25, 2022
	44030817.023 (Ext of .021)	January 16, 2020	August 16, 2022
SWFWMD ERP	44030817.018	June 27, 2019	March 9, 2023
SWFWMD WUP	20001194.003	May 14, 2018	May 14, 2028
FDEP NOI NPDES Phase II		July 11, 2018	July 11, 2023
FDEP NOI NPDES Phase I		September 29, 2018	September 28, 2023
FDEP Water		October 19, 2018	October 18, 2023
FDEP Wastewater		November 30, 2018	November 29, 2023

5. OPINION OF PROBABLE CONSTRUCTION COSTS

Table B shown below presents, among other things, the Opinion of Probable Cost for the CIP. It is our professional opinion that the costs set forth in Table B are reasonable and consistent with market pricing.

TABLE B

Infrastructure	Master	2021 Project Area Phase 1	Future Phase 2 Area	Total CIP
Roadways	\$532,439.00	\$783,520.29	\$951,133.90	\$2,267,093.19
Stormwater Management	\$122,497.00	\$2,528,686.05	\$2,210,131.28	\$4,861,314.33
Utilities (Water and Sewer)	\$435,659.00	\$760,071.14	\$1,195,183.78	\$2,390,913.92
Utilities Commitment/Impact Fees	\$1,042,272.00	\$0.00	\$1,042,272.00	\$2,084,544.00
Hardscape/Landscape	\$0.00	\$83,300.00	\$86,700.00	\$170,000.00
Undergrounding of Conduit	\$0.00	\$52,800.00	\$57,275.00	\$110,075.00
Recreational Amenities, Walking Trails	\$0.00	\$49,000.00	\$51,000.00	\$100,000.00
Professional Services*	\$378,405.00	\$0.00	\$0.00	\$378,405.00
Offsite Improvements	\$433,254.17	\$0.00	\$0.00	\$433,254.17
Contingency	\$0.00	\$298,777.25	\$341,002.73	\$639,779.98
TOTAL	\$2,944,526.17	\$4,556,154.73	\$5,934,698.69	\$13,435,379.59

The probable costs estimated herein do not include anticipated carrying cost, interest reserves or other anticipated CDD expenditures that may be incurred.

*All Master Costs occur at the timing of Phase 1 except for the \$293,830.00 which is timed to occur during Phase 2 and is included in the total in the above Professional Fees.

6. CONCLUSIONS

The CIP will be designed in accordance with current governmental regulations and requirements. The CIP will serve its intended function so long as the construction is in substantial compliance with the design.

It is further our opinion that:

- The estimated cost of the CIP as set forth herein is reasonable based on prices currently being experienced in Pasco County, Florida, and is not greater than the lesser of the actual cost of construction or the fair market value of such infrastructure;
- All of the improvements comprising the CIP are required by applicable development approvals;
- The CIP is feasible to construct, there are no technical reasons existing at this time that would prevent the implementation of the CIP, and it is reasonable to assume that all necessary regulatory approvals will be obtained in due course;
- The reasonably expected economic life of the CIP is anticipated to be at least 20+ years;
- The assessable property within the District will receive a special benefit from the CIP that is at least equal to such costs; and
- The CIP will function as a system of improvements benefitting all lands within the District.

The professional service for establishing the Construction Cost Estimate is consistent with the degree of care and skill exercised by members of the same profession under similar circumstances.

The CIP will be owned by the District or other governmental units and such CIP is intended to be available and will reasonably be available for use by the general public (either by being part of a system of improvements that is available to the general public or is otherwise available to the general public) including nonresidents of the District. All the CIP is or will be located on lands owned or to be owned by the District or another governmental entity or on public easements in favor of the District or other governmental entity. The CIP, and any cost estimates set forth herein, do not include any earthwork, grading or other improvements on private lots or property. Regarding any fill generated by construction of the CIP, and that is not used as part of the CIP, such fill will only be placed on-site at the expense of the Developer.

Please note that the CIP as presented herein is based on current plans and market conditions which are subject to change. Accordingly, the CIP, as used herein, refers to sufficient public infrastructure of the kinds described herein (i.e., stormwater/floodplain management, sanitary sewer, potable water, etc.) to support the development and sale of the planned residential units in the District, which (subject to true-up determinations) number and type of units may be changed with the development of the site. Stated differently, during development and implementation of the public infrastructure improvements as described for the District, it may be necessary to make modifications and/or deviations for the plans, and the District expressly reserves the right to do so.

Paul E. Skidmore, P.E.

Date

FL License No. 39631

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EXHIBIT “A”

SECTION 32, TOWNSHIP 24 SOUTH, RANGE 21 EAST
DADE CITY, PASCO COUNTY, FLORIDA

LEGAL DESCRIPTION: (PER COMMITMENT)

THE SOUTH 1/2 OF THE SOUTHWEST 1/4 OF THE NORTHEAST 1/4; THE NORTHEAST 1/4 OF THE NORTHWEST 1/4 OF THE SOUTHEAST 1/4; THE NORTHWEST 1/4 OF THE NORTHWEST 1/4 OF THE SOUTHEAST 1/4; THE SOUTHWEST 1/4 OF THE NORTHWEST 1/4 OF THE SOUTHEAST 1/4, AND THE NORTH 1/2 OF THE NORTHWEST 1/4 OF THE SOUTHWEST 1/4 OF THE SOUTHEAST 1/4; THE NORTHEAST 1/4 OF THE SOUTHWEST 1/4; THE NORTH 1/4 OF THE SOUTHEAST 1/4 OF THE SOUTHWEST 1/4; THE NORTHEAST 1/4 OF THE NORTHWEST 1/4 OF THE SOUTHWEST 1/4 OF THE SOUTHWEST 1/4 OF THE SOUTHWEST 1/4 ALL IN SECTION 32, TOWNSHIP 24 SOUTH, RANGE 21 EAST, ALL OF SAID PROPERTY BEING SITUATE IN PASCO COUNTY, FLORIDA.

SUBJECT TO ALL RIGHTS OF WAY FOR ROADS.

SCHEDULE B-II: (PER COMMITMENT)

- DEFECTS, LIENS, ENCUMBRANCES, ADVERSE CLAIMS OR OTHER MATTERS, IF ANY, CREATED, FIRST APPEARING IN THE PUBLIC RECORDS OR ATTACHING SUBSEQUENT TO THE EFFECTIVE DATE BUT PRIOR TO THE DATE THE PROPOSED INSURED ACQUIRES FOR VALUE OF RECORD THE ESTATE OR INTEREST OR MORTGAGE THEREON COVERED BY THIS COMMITMENT.
NOT A SURVEY MATTER.
- ANY RIGHTS, INTERESTS, OR CLAIMS OF PARTIES IN POSSESSION OF THE LAND NOT SHOWN BY THE PUBLIC RECORDS.
NOT A SURVEY MATTER.
- ANY ENCROACHMENT, ENCUMBRANCE, VIOLATION, VARIATION OR ADVERSE CIRCUMSTANCE AFFECTING THE TITLE THAT WOULD BE DISCLOSED BY AN ACCURATE AND COMPLETE LAND SURVEY OF THE LAND.
NOT A SURVEY MATTER.
- ANY LIEN, FOR SERVICES, LABOR, OR MATERIALS IN CONNECTION WITH IMPROVEMENTS, REPAIRS OR RENOVATIONS PROVIDED BEFORE, ON, OR AFTER DATE OF POLICY, NOT SHOWN BY THE PUBLIC RECORDS.
NOT A SURVEY MATTER.
- ANY DISPUTE AS TO THE BOUNDARIES CAUSED BY A CHANGE IN THE LOCATION OF ANY WATER BODY WITHIN OR ADJACENT TO THE LAND PRIOR TO DATE OF POLICY, AND ANY ADVERSE CLAIM TO ALL OR PART OF THE LAND THAT IS, AT DATE OF POLICY, OR WAS PREVIOUSLY UNDER WATER.
NOT A SURVEY MATTER.
- TAXES OR SPECIAL ASSESSMENTS NOT SHOWN AS LIENS IN THE PUBLIC RECORDS OR IN THE RECORDS OF THE LOCAL TAX COLLECTING AUTHORITY, AT DATE OF POLICY.
NOT A SURVEY MATTER.
- INTENTIONALLY DELETED.
- TAXES AND ASSESSMENTS FOR THE YEAR 2020 AND SUBSEQUENT YEARS, WHICH ARE NOT YET DUE AND PAYABLE.
NOT A SURVEY MATTER.
- INTENTIONALLY DELETED.
- RULES AND REGULATIONS OF THE SOUTHWEST FLORIDA WATER MANAGEMENT DISTRICT AS SET OUT IN CERTIFICATE RECORDED IN BOOK 190, PAGE 83.
THE LANDS DESCRIBED THEREIN INCLUDE ALL OF THE SUBJECT PROPERTY.
- EASEMENT AGREEMENT BY AND BETWEEN ROADSIDE GROVES AND ANTHONY L. WATKINS RECORDED IN BOOK 5047, PAGE 103 AND SUPPORTED BY AFFIDAVIT RECORDED IN BOOK 5047, PAGE 114.
SHOWN HEREON.
- NOTICE OF ESTABLISHMENT OF THE SUMMIT VIEW COMMUNITY DEVELOPMENT DISTRICT RECORDED IN BOOK 7042, PAGE 1682, TOGETHER WITH THE TERMS AND CONDITIONS CONTAINED IN FINAL JUDGMENT RECORDED IN BOOK 6625, PAGE 1372.
INCLUDES ALL OF SUBJECT PROPERTY LYING EAST OF HAPPY HILL ROAD.
- ANY AND ALL LOSS OR DAMAGE OF ANY KIND, INCLUDING BUT NOT LIMITED TO COSTS AND ATTORNEY'S FEES, ARISING FROM OR RELATED TO ANY CLAIM OR ALLEGATION SET FORTH IN THE PENDING LITIGATION IN THE CIRCUIT COURT OF PASCO COUNTY, FLORIDA, UNDER CASE NO. 2018-CA-001241, STYLED JANET DENLINGER V. SUMMIT VIEW, LLC ET AL.
NOT A SURVEY MATTER.
- ANY AND ALL LOSS OR DAMAGE OF ANY KIND, INCLUDING BUT NOT LIMITED TO COSTS AND ATTORNEY'S FEES, ARISING FROM OR RELATED TO ANY CLAIM OR ALLEGATION SET FORTH IN THE PENDING LITIGATION IN THE CIRCUIT COURT OF PASCO COUNTY, FLORIDA, UNDER CASE NO. 2018-CA-002117, STYLED ROBERTO VALDEZ V. SUMMIT VIEW, LLC ET AL.
NOT A SURVEY MATTER.
- TERMS, CONDITIONS, RIGHTS AND OBLIGATIONS OF THE SETTLEMENT AGREEMENT DATED AUGUST 31, 2018, BY AND BETWEEN THE CITY OF DADE CITY AND SUMMIT VIEW, LLC, DOUGLAS J. WEILAND, JES PROPERTIES, INC., AND CWESIII, LLC, RECORDED OCTOBER 3, 2018 IN BOOK 9797, PAGE 843.
THE LANDS DESCRIBED THEREIN INCLUDE ALL OF THE SUBJECT PROPERTY.
- TERMS, CONDITIONS AND PROVISIONS CONTAINED IN THAT AGREEMENT FOR PROVISION OF WATER AND WASTEWATER SERVICES BETWEEN SUMMIT VIEW, LLC AND CITY OF DADE CITY RECORDED OCTOBER 3, 2018 IN BOOK 9797, PAGE 918.
INCLUDES ALL OF SUBJECT PROPERTY LYING EAST OF HAPPY HILL ROAD.
- EASEMENT OVER THE LAND DESCRIBED IN SCHEDULE "A" IN FAVOR OF THE ADJOINING LANDS RESULTING FROM SAID LANDS BEING LANDLOCKED.
NOT A SURVEY MATTER.
- TERMS AND CONDITIONS OF ANY EXISTING UNRECORDED LEASE(S), AND ALL RIGHTS OF LESSEE(S) AND ANY PARTIES CLAIMING THROUGH THE LESSEE(S) UNDER THE LEASE(S).
NOT A SURVEY MATTER.

ABBREVIATION LEGEND:

A/C	= AIR CONDITIONER	MAS	= MASONRY
ADW	= ASPHALT DRIVEWAY	MB	= MAILBOX
BC	= BACK OF CURB	MES	= MITERED END SECTION
BWF	= WIRE OR BARBED WIRE FENCE	MOL	= MORE OR LESS
(C)	= CALCULATED DATA	NAD	= NORTH AMERICAN DATUM
CB	= CABLE / TELECOMMUNICATIONS BOX	NAVd	= NORTH AMERICAN VERTICAL DATUM
CCR	= CERTIFIED CORNER RECORD	NGVD	= NATIONAL GEODETIC VERTICAL DATUM
CDW	= CONCRETE DRIVEWAY	NP	= NORMAL POOL ELEVATION
CLF	= CHAIN LINK FENCE	NR	= NON-RADIAL
CMP	= CORRUGATED METAL PIPE	OA	= OVERALL
CO	= CLEANOUT	OHW	= OVERHEAD WIRE
CONC	= CONCRETE	ORB	= OFFICIAL RECORDS BOOK
CPB	= CONDO PLAT BOOK	(P)	= PLAT DATA
CPP	= CORRUGATED PLASTIC PIPE	PAO	= PROPERTY APPRAISERS OFFICE
CSW	= CONCRETE SIDEWALK	PB	= PLAT BOOK
C/C	= COVERED CONC	PED	= PEDESTRIAN CROSSWALK SIGNAL
(D)	= DEED DATA	PG(S)	= PAGE(S)
DB	= DEED BOOK	PL	= PROPERTY LINE
DBH	= DIAMETER BREAST HEIGHT	POB	= POINT OF BEGINNING
DNH	= DRAINAGE MANHOLE	POC	= POINT OF COMMENCEMENT
ELEC	= ELECTRIC	POL	= POINT ON LINE
EOW	= EDGE OF WATER	PP	= POWER/UTILITY POLE
EP	= EDGE OF PAVEMENT	PVC	= POLY(VINYL)CHLORIDE PIPE
ERM	= ELECTRIC PAINT MARK	PVCF	= PVC FENCE
ERCP	= ELIPTICAL REINFORCED CONCRETE PIPE	RCP	= REINFORCED CONC PIPE
ESMT	= EASEMENT	R/W	= RIGHT-OF-WAY
FFE	= FINISHED FLOOR ELEVATION	RWM	= RIGHT-OF-WAY MAP
FH	= FIRE HYDRANT	SCM	= SET 4"x4" CONCRETE MONUMENT
FCM	= FOUND CONCRETE MONUMENT (AS NOTED)		PRM LB 8342
FDOT	= FLORIDA DEPARTMENT OF TRANSPORTATION	SEC	= SECTION, TOWNSHIP AND RANGE
FIR	= FOUND IRON ROD (AS NOTED)	SHW	= SEASONAL HIGH WATER ELEVATION
FID	= FOUND NAIL AND DISK (AS NOTED)	SIR	= SET IRON ROD 1/2" LB 8342
FINL	= FOUND NAIL	SMH	= SANITARY MANHOLE
FOB	= FIBER OPTIC BOX	SND	= SET NAIL AND DISK LB 8342
FOP	= FOUND OPEN PIPE	SPK	= SANITARY PAINT MARK
FOV	= FIBER OPTIC VAULT	SRD	= STATE ROAD DEPARTMENT
FPP	= FOUND PINCHED PIPE	S/W	= SIDEWALK
FRS	= FOUND RAILROAD SPIKE	WDF	= WOOD FENCE
FXC	= FOUND X-CUT	WM	= WATER METER
GI	= GRATE INLET	WPM	= WATER PAINT MARK
GPM	= GAS PAINT MARK	WV	= WATER VALVE
GUY	= GUY ANCHOR	TBM	= TEMPORARY BENCHMARK
GV	= GAS VALVE	THH	= TRAFFIC HAND HOLE
IE	= INVERT ELEVATION	TOB	= TOP OF BANK
IHH	= IRRIGATION HAND HOLE	TOS	= TOE OF SLOPE
IV	= IRRIGATION VALVE	TSB	= TRAFFIC SIGNAL BOX
(L)	= LEGAL DESCRIPTION DATA	TSP	= TRAFFIC SIGNAL POLE
LP	= LIGHT POLE	TSV	= TRAFFIC SIGNAL VAULT
(M)	= MEASURED DATA	VCP	= VITRIFIED CLAY PIPE
		DIP	= DUCTILE IRON PIPE

SYMBOL LEGEND:

	SANITARY SEWER MANHOLE, PIPE, VALVE, CLEANOUT, WARNING SIGN & PAINT MARK IDENTIFYING PROBABLE LOCATION OF UTILITY
	TELECOMMUNICATIONS MANHOLE, LINE, VAULT, BOX, HAND HOLE, WARNING SIGN & PAINT MARK IDENTIFYING PROBABLE LOCATION OF UTILITY
	FIBER OPTIC VAULT, LINE, BOX, HAND HOLE, WARNING SIGN & PAINT MARK IDENTIFYING PROBABLE LOCATION OF UTILITY
	GAS MANHOLE, LINE, VALVE, METER, WARNING SIGN & PAINT MARK IDENTIFYING PROBABLE LOCATION OF UTILITY
	WATER MANHOLE, LINE, VALVE, AIR RELEASE VALVE, METER, FIRE HYDRANT, FIRE DEPARTMENT CONNECTION, BLOW OFF, WARNING SIGN & PAINT MARK IDENTIFYING PROBABLE LOCATION OF UTILITY
	RECLAIMED WATER MANHOLE, LINE, VALVE, AIR RELEASE VALVE, METER, FIRE HYDRANT, FIRE DEPARTMENT CONNECTION, BLOW OFF, WARNING SIGN & PAINT MARK IDENTIFYING PROBABLE LOCATION OF UTILITY
	ELECTRIC MANHOLE, LINE, TRANSFORMER, VAULT, OUTLET, BOX, HAND HOLE, WARNING SIGN & PAINT MARK IDENTIFYING PROBABLE LOCATION OF UTILITY
	GUY ANCHOR, UTILITY POLE, PANEL, OVERHEAD WIRE, METER, POWER POLE WITH LIGHT, UTILITY POLE AND GUY POLE
	UNKNOWN UTILITY MANHOLE, LINE, VAULT, BOX, HAND HOLE, WARNING SIGN & PAINT MARK IDENTIFYING PROBABLE LOCATION OF UTILITY
	STORM SEWER MANHOLE, PIPE, GRATE INLET & CLEANOUT
	SIGN
	MONITOR WELL

LINETYPE LEGEND:

	= BOUNDARY
	= TOE OF SLOPE
	= TOP OF BANK
	= RIGHT-OF-WAY
	= CENTERLINE

SURVEYOR'S NOTES:

- TYPE OF SURVEY: BOUNDARY AND TOPOGRAPHIC SURVEY. THE INTENT OF THE TOPOGRAPHIC SURVEY IS TO SHOW A LIMITED NUMBER TRANSECTS TO FACILITATE COMPARISON WITH LIDAR TOPOGRAPHIC DATA. ANY USE OF THIS SURVEY FOR PURPOSES OTHER THAN WHICH IT WAS INTENDED, WITHOUT WRITTEN VERIFICATION, WILL BE AT THE USER'S SOLE RISK AND WITHOUT LIABILITY TO THE SURVEYOR. NOTHING HEREIN SHALL BE CONSTRUED TO GIVE ANY RIGHTS OR BENEFITS TO ANYONE OTHER THAN THOSE CERTIFIED TO.
- THIS SURVEY WAS PREPARED WITH THE BENEFIT OF A COMMITMENT FOR TITLE INSURANCE PREPARED BY FIRST AMERICAN TITLE INSURANCE COMPANY, FILE NO. 2061-4804933, DATED JUNE 30, 2020 @ 8:00AM (AND NOTED N/C THRU 2/5/21 @ 8:00 AM). SEE SCHEDULE B-II AND NOTES, THIS SHEET.
- NO INSTRUMENTS OF RECORD REFLECTING EASEMENTS, RIGHTS-OF-WAY, AND/OR OWNERSHIP WERE FURNISHED TO OR PURSUED BY THE UNDERSIGNED OTHER THAN THOSE SHOWN HEREON. EASEMENTS OR RESTRICTIONS OF RECORD OTHER THAN THOSE SHOWN HEREON MAY EXIST.
- NO EXCAVATION WAS PERFORMED TO VERIFY THE LOCATION OR EXISTENCE OF ANY UNDERGROUND IMPROVEMENTS, STRUCTURES, OR FOUNDATIONS. UNDERGROUND UTILITIES IF SHOWN HEREON ARE SHOWN PER ABOVE GROUND EVIDENCE AND/OR RECORD DRAWINGS OR MUNICIPAL ATLAS INFORMATION AND THE LOCATION OF ALL UNDERGROUND UTILITY LINES ARE APPROXIMATE ONLY. THIS DOCUMENT SHOULD NOT BE RELIED UPON FOR EXCAVATION OR CRITICAL DESIGN FUNCTIONS WITHOUT FIELD VERIFICATION OF UNDERGROUND UTILITY LOCATIONS. UTILITIES OTHER THAN THOSE SHOWN HEREON MAY EXIST.
- THE SURVEY DEPICTED HEREON IS NOT INTENDED TO SHOW THE LOCATION OR EXISTENCE OF ANY WETLAND OR JURISDICTIONAL AREAS, OR AREAS OF PROTECTED SPECIES OF VEGETATION EITHER NATURAL OR CULTIVATED.
- THIS SURVEY MAP AND REPORT OR COPIES THEREOF ARE NOT VALID WITHOUT THE ORIGINAL SIGNATURE AND SEAL OF A FLORIDA LICENSED SURVEYOR AND MAPPER.
- ADDITIONS OR DELETIONS TO SURVEY MAPS OR REPORTS BY OTHER THAN THE SIGNING PARTY OR PARTIES IS PROHIBITED WITHOUT WRITTEN CONSENT OF THE SIGNING PARTY OR PARTIES.
- ADJOINING PROPERTY OWNERS AND RECORDING INFORMATION IS BASED ON THE COUNTY PROPERTY APPRAISER WEB SITE AND IS FOR INFORMATIONAL PURPOSES ONLY. NAMES AND RECORDING INFORMATION WAS OBTAINED ON 3/5/2021.
- AT THE TIME OF THIS SURVEY THERE IS CURRENT EARTH MOVING WORK UNDER WAY ON THE SUBJECT PROPERTY.
- INTERIOR IMPROVEMENTS ARE SHOWN ACCORDING TO THAT CERTAIN TOPOGRAPHIC SURVEY REFERENCED IN SURVEYOR'S NOTE 15(C) AND HAVE NOT BEEN RESURVEYED FOR THIS SURVEY.
- BEARINGS AND DISTANCES SHOWN HEREON ARE MEASURED UNLESS QUALIFIED OTHERWISE.
- BEARINGS AND STATE PLANE COORDINATES (FLORIDA WEST ZONE) SHOWN HEREON ARE BASED ON THE NORTH AMERICAN DATUM (NAD) 83(2011). CONTROL STATIONS UTILIZED ARE IDENTIFIED BY THE NATIONAL GEODETIC SURVEY (NGS) AS "K37 155" AND "L37 156". AS A MEANS OF REFERENCE THE SOUTH LINE OF THE NORTHWEST 1/4 OF THE SOUTHWEST 1/4 OF SECTION 32, TOWNSHIP 24 SOUTH, RANGE 21 EAST, BEING N89°56'22"W, AS SHOWN HEREON.
- HORIZONTAL CONTROL POSITIONS WERE DERIVED BY GLOBAL POSITIONING SYSTEM (GPS) OBSERVATIONS UTILIZING A VIRTUAL REFERENCE STATION REAL TIME NETWORK SOLUTION AND ARE THE PRODUCT OF REDUNDANT OBSERVATION SESSIONS CONSISTING OF AT LEAST 60 EPOCHS EACH. THE MAXIMUM POSITIONAL UNCERTAINTY OF THE PHYSICAL CONTROL POINTS IS COMPUTED TO BE 0.05 FEET USING THE ALGEBRAIC SUM MEAN OF THE PROCESSED POSITIONS.
- COORDINATES AND DISTANCES SHOWN HEREON ARE IN U.S. SURVEY FEET.
- THIS SURVEY WAS PREPARED WITH THE BENEFIT OF THE FOLLOWING:
A) STATE OF FLORIDA STATE ROAD DEPARTMENT RIGHT-OF-WAY MAP FOR SECTION NO. 14510-2152 (ROAD NO. S-579) AS RECORDED IN ROAD PLAT BOOK 1, PAGE 279 OF THE PUBLIC RECORDS OF PASCO COUNTY, FLORIDA. THE RIGHT-OF-WAY FOR HAPPY HILL ROAD IS ACCORDING TO SAID RIGHT-OF-WAY MAP.
B) A TOPOGRAPHIC SURVEY OF THE SUBJECT PROPERTY TITLE "SUMMIT VIEW" PREPARED BY FLORIDA LAND DESIGN & PERMITTING, INC., PROJECT NUMBER 2020-1039, DATED JUNE 5, 2020.
C) FY 2007 PASCO COUNTY HORIZONTAL CONTROL DEVIATION (L726) MAP FOR TOWNSHIP 24 SOUTH, RANGE 21 EAST, AS PREPARED BY DC JOHNSON ASSOCIATES, PROJECT NUMBER NO. 2006-102A01, DATED 3/3/2008. CERTAIN SUBMERGED SECTION CORNER POSITIONS WERE CALCULATED UTILIZING THIS MAP.
D) CERTIFIED CORNER RECORDS AS NOTED HEREON, AS PUBLISHED BY THE FLORIDA DEPARTMENT OF ENVIRONMENTAL PROTECTION.
E) UNITED STATES GEOLOGICAL SURVEY TOPOGRAPHIC MAP OF DADE CITY, FLORIDA (2018). NAMES OF WATER BODIES SHOWN HEREON ARE ACCORDING TO SAID MAP.
- BY SCALED DETERMINATION THE SUBJECT PROPERTY APPEARS TO LIE IN FLOOD ZONE "X" (UNSHADED, AREAS DETERMINED TO BE OUTSIDE THE 0.2% ANNUAL CHANCE FLOODPLAIN) PER FLOOD INSURANCE RATE MAP, MAP NUMBER 12101C0280F, MAP EFFECTIVE DATE SEPTEMBER 26, 2014. AN ACCURATE ZONE DETERMINATION SHOULD BE MADE BY THE PREPARER OF THE MAP, THE FEDERAL EMERGENCY MANAGEMENT AGENCY, OR THE LOCAL GOVERNMENT AGENCY HAVING JURISDICTION OVER SUCH MATTERS PRIOR TO ANY JUDGMENTS BEING MADE FROM THE ZONE AS NOTED.
- EXCEPT IN THE CASE OF AN IRREGULAR BOUNDARY OR WATER COURSE, NUMERICAL EXPRESSIONS SHOWN HEREON TO THE NEAREST FOOT OR TENTH OF A FOOT ARE TO BE INTERPRETED AS HAVING A PRECISION TO THE NEAREST ONE-HUNDREDTH OF A FOOT.
- LAST DATE OF FIELD SURVEY: 11/23/2020

FLORIDA LAND DESIGN & PERMITTING, INC.
CERTIFICATE OF AUTHORIZATION LB8342

JOSEPH E. BECKMAN, PSM
STATE OF FLORIDA LS7204

CERTIFIED TO:

D.R. HORTON, INC., A DELAWARE CORPORATION
FIRST AMERICAN TITLE INSURANCE COMPANY
BOOTH & COOK, P.A.
SUMMIT VIEW, LLC

1000 STARRY FOLLOVED
THIRTY, FLORIDA 34855
PHONE: (771) 478-2421
www.floridalanddesign.com
Surveyor # CA No. 18342



SUMMIT VIEW, LLC

STATE LAND ROAD R/W
PALM HARBOR, FL 34684
OFFICE 880-880-8800

SUMMIT VIEW

BOUNDARY SURVEY

PREPARED FOR

PROJECT NO. 1039

PROJECT NO. 2020-1039

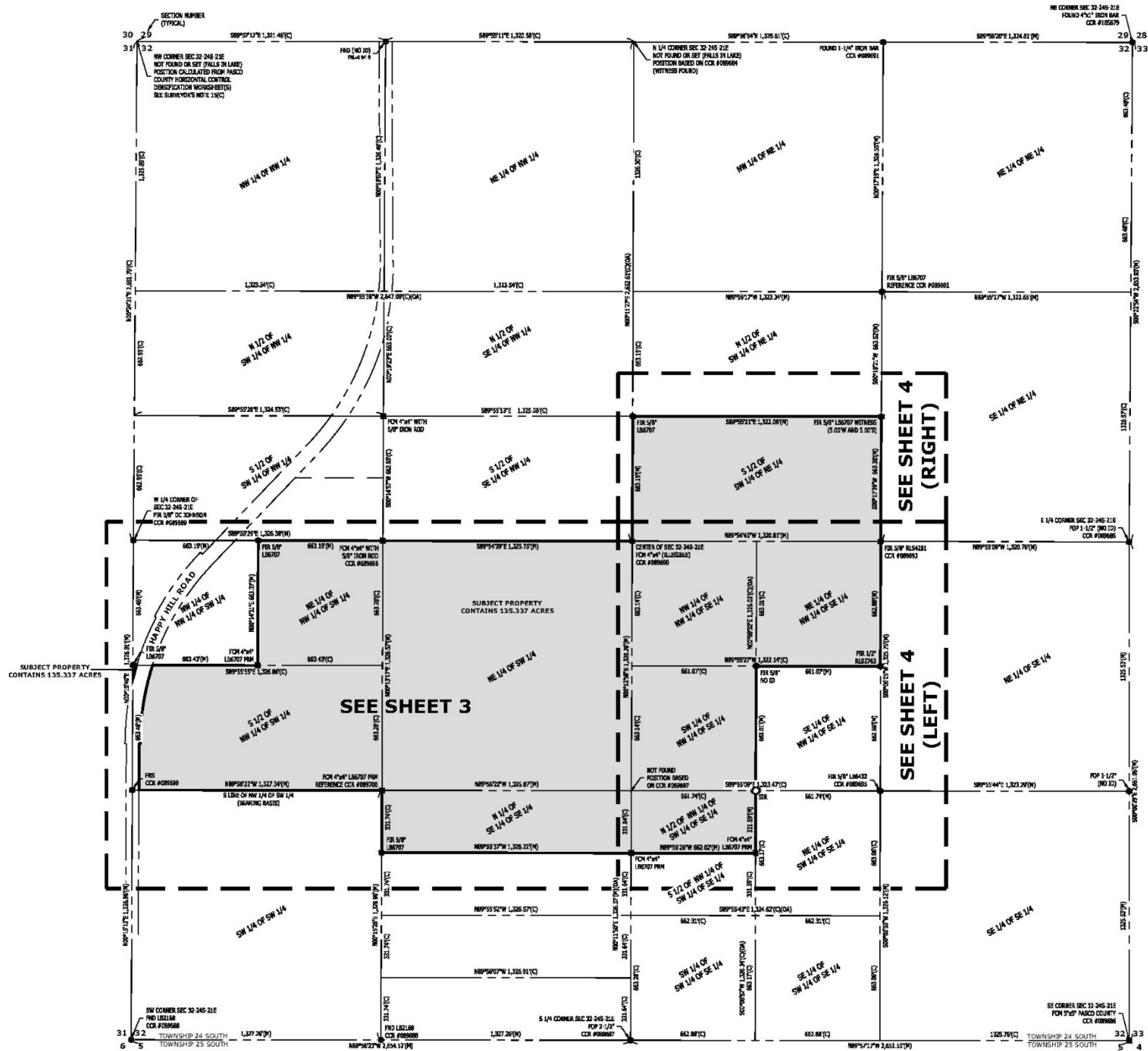
FILE NUMBER 00230004

DATE JEB

DATE 3/10/2021

SHEET 1 of 4

— SUBJECT PROPERTY

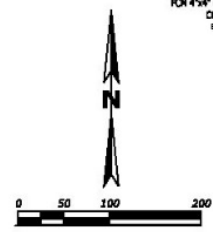
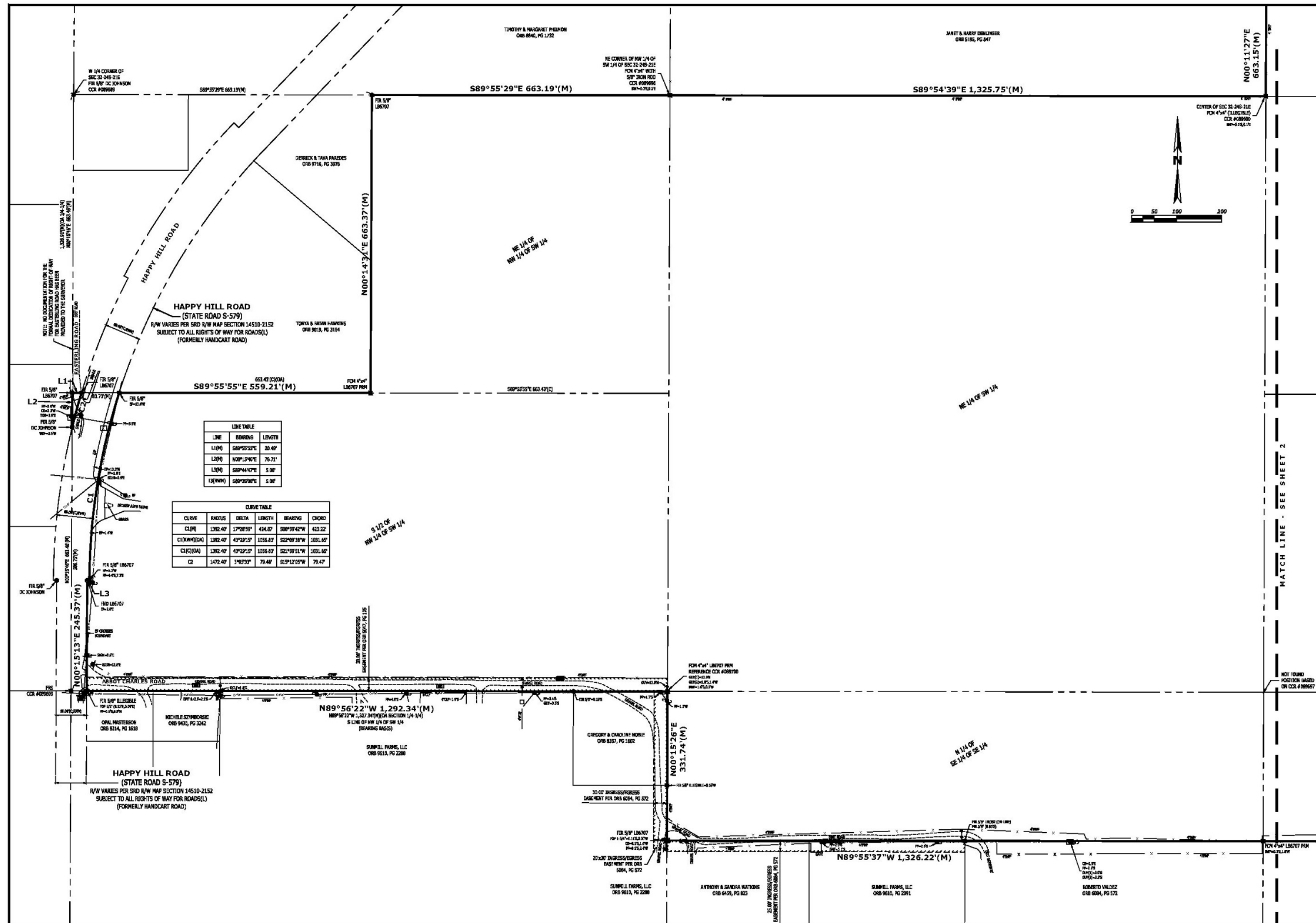


KEY MAP AND SECTION BREAKDOWN SHEET

Florida Land Design & Permitting

3035 STATE ROUTE 1040
TRINITY, FLORIDA 34555
PHONE: (727) 478-2421
FAX: (727) 478-2422
E-mail: info@fldesign.com
Engineer # C-10 33048
Surveyor # 18342

PROJECT NO.	1039
PROJECT NAME	SUMMIT VIEW
SHEET NAME	BOUNDARY SURVEY
DATE	3/10/2021
SHEET	2 of 4



LINE TABLE		
LINE	BEARING	LENGTH
L1(M)	S89°55'53"E	20.49'
L2(M)	N00°13'46"E	76.71'
L3(M)	S89°44'47"E	5.00'
L3(RUN)	S89°35'00"E	5.00'

CURVE	RADIUS	DELTA	LENGTH	BEARING	CHORD
CL(H)	1392.40	17°28'59"	434.87	S00°59'42"W	423.22
CL(RH4)(DA)	1392.40	43°22'15"	1356.83	S22°09'38"W	1031.65
CL(C)(DA)	1392.40	43°22'15"	1356.83	S21°59'51"W	1031.65
C2	1472.40	34°05'33"	79.46	S15°12'05"W	79.47

3030 STARKEY BOULEVARD
TRINITY, FLORIDA 34555
PHONE: (727) 478-2421
www.fidandp.com
E-mail: info@fidandp.com
Engineer # - CA No. 33088
Survey # - LB8342



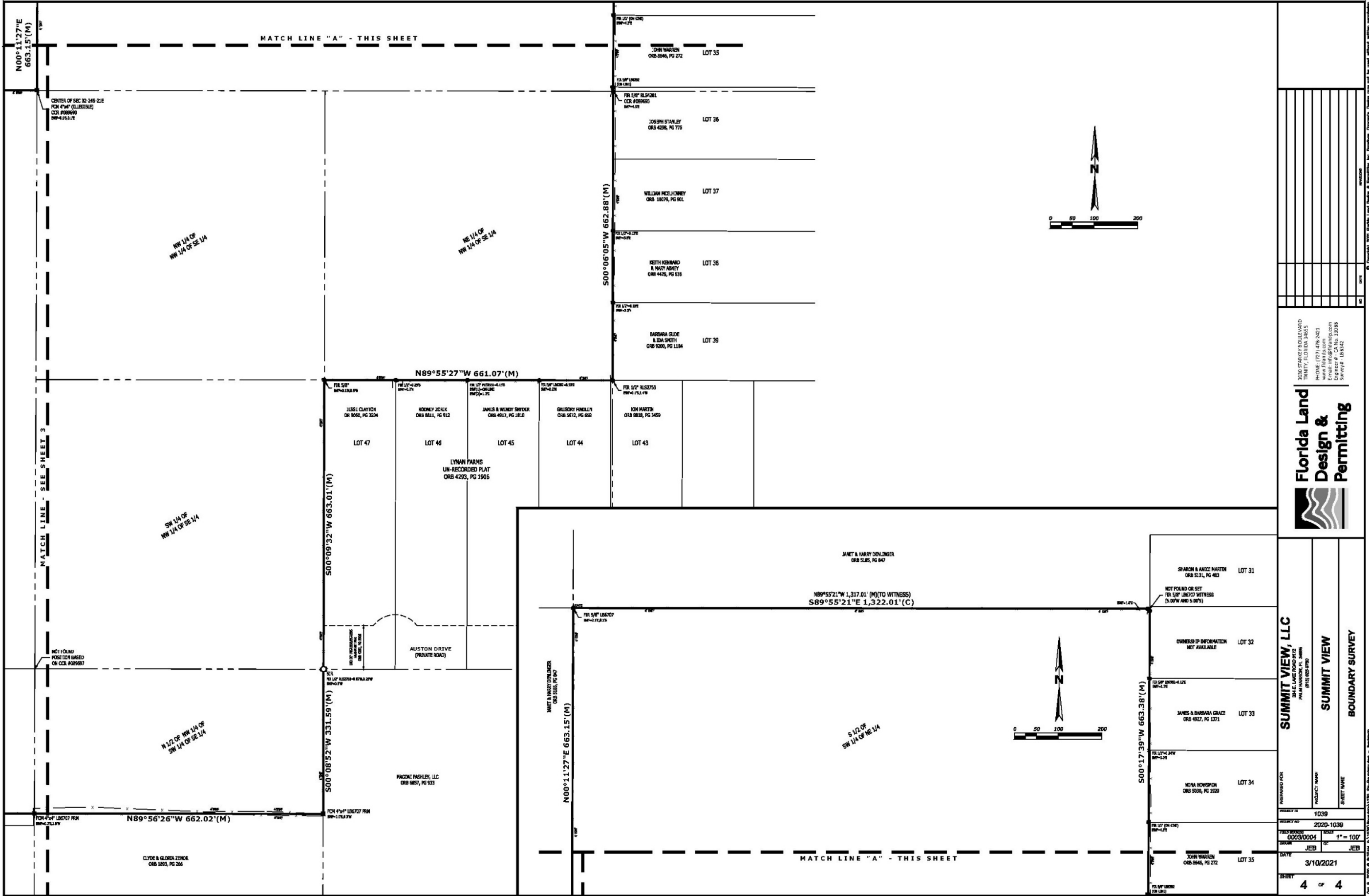
**Florida Land
Design &
Permitting**

SUMMIT VIEW, LLC
134 E LAKE ROAD #270

SUMMIT VIEW

BOUNDARY SURVEY

PROJECT NO		1039	
PROJECT A/C		2020-1039	
FIELD NUMBER		SCALE	
0003/0004		1" = 10'	
DRAWN		C/C	
JEB		JET	
DATE			
3/10/2021			
SHEET			
3 OF 4			

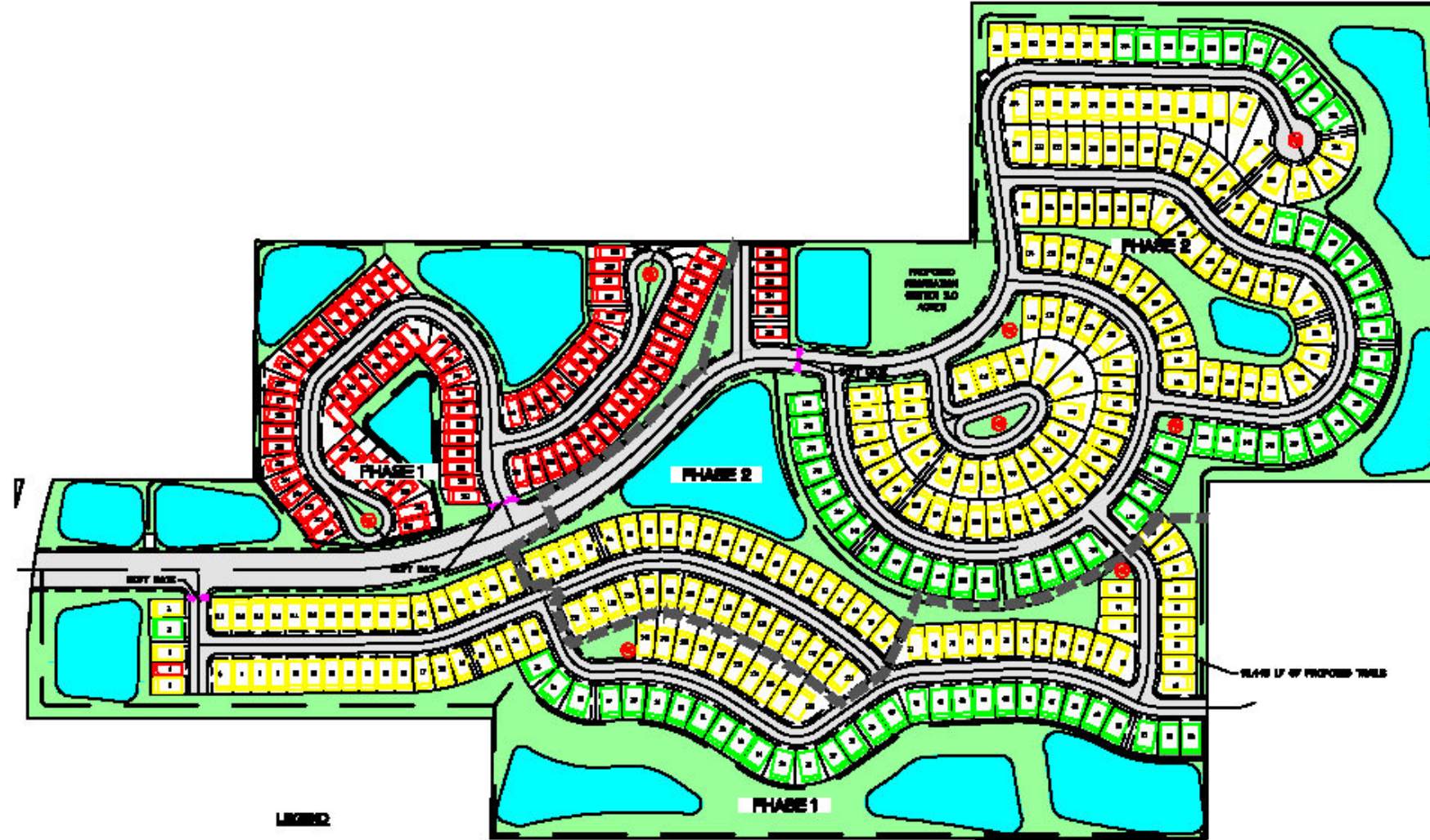
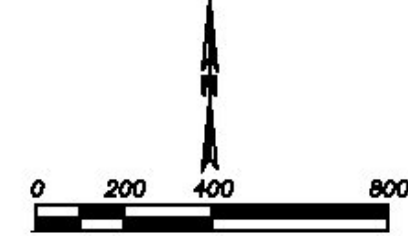
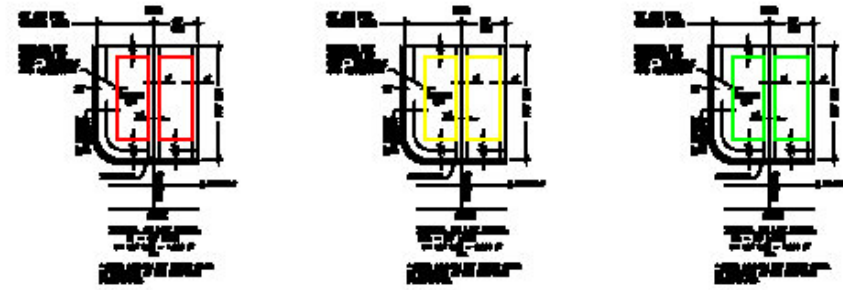


Florida Land Design & Permitting

3025 STARKEY BOULEVARD
TRINITY, FLORIDA 34655
PHONE: (727) 898-2421
FAX: (727) 898-2421
E-mail: info@floridalanddesign.com
Surveyor # CA No. 33088
Surveyor # 16842

SUMMIT VIEW, LLC	
SUMMIT VIEW	
BOUNDARY SURVEY	
PROJECT NO.	1039
PROJECT NAME	2020-1039
PROJECT NO.	00030004
PROJECT NAME	JEB
DATE	3/10/2021
SHEET	4 OF 4

EXHIBIT “B”



LEGEND

LANDSCAPE OPEN SPACE

POND OPEN SPACE

RIGHT OF WAY

PROPOSED TRAILS

MAIL KIOSK

AREAS

TOTAL OPEN SPACE 53.46 AC

RIGHT OF WAY 22.10 AC

TOTAL LOTS 59.80 AC

TOTAL PARCEL 135.35 AC

Florida Land Design & Permitting

10000 W. US HWY 1, SUITE 100
FORT MYERS, FL 33907
PHONE: (813) 772-0000
FAX: (813) 772-0001

SUMMIT VIEW LLC

10000 W. US HWY 1, SUITE 100
FORT MYERS, FL 33907
PHONE: (813) 772-0000
FAX: (813) 772-0001

SUMMIT VIEW

COMMUNITY DEVELOPMENT

DISTRICT EXHIBIT B

PROJECT NAME

PROJECT NUMBER

DATE

SCALE

1039

2020-1039

EFR

EFR

PS

PS

4-23-2021

1 OF 1

EXHIBIT “C”

LEGAL DESCRIPTION

THE SOUTH 1/2 OF THE SOUTHWEST 1/4 OF THE NORTHEAST 1/4; THE NORTHEAST 1/4 OF THE NORTHWEST 1/4 OF THE SOUTHEAST 1/4; THE NORTHWEST 1/4 OF THE NORTHWEST 1/4 OF THE SOUTHEAST 1/4; THE SOUTHWEST 1/4 OF THE NORTHWEST 1/4 OF THE SOUTHEAST 1/4, AND THE NORTH 1/2 OF THE NORTHWEST 1/4 OF THE SOUTHWEST 1/4 OF THE SOUTHEAST 1/4; THE NORTHEAST 1/4 OF THE SOUTHWEST 1/4; THE NORTH 1/4 OF THE SOUTHEAST 1/4 OF THE SOUTHWEST 1/4; THE NORTHEAST 1/4 OF THE NORTHWEST 1/4 OF THE SOUTHWEST 1/4, AND THE SOUTH 1/2 OF THE NORTHWEST 1/4 OF THE SOUTHWEST 1/4 ALL IN SECTION 32, TOWNSHIP 24 SOUTH, RANGE 21 EAST, ALL OF SAID PROPERTY BEING SITUATE IN PASCO COUNTY, FLORIDA.

SUBJECT TO ALL RIGHTS OF WAY FOR ROADS

Tab 8



Rizzetta & Company

Summit View Community Development District

Preliminary Supplemental Special
Assessment Allocation Report

Special Assessment Bonds, Series 2021A (2021 Project)
and
Special Assessment Bonds, Series 2021B (2021 Project)

June 18, 2021

12750 Citrus Park Lane
Suite 115
Tampa, FL 33625

rizzetta.com

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PRELIMINARY ALLOCATION METHODOLOGY



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I. INTRODUCTION

This Preliminary Supplemental Special Assessment Allocation Report (herein the **“Report”**) is a supplement to the District’s adopted *Amended Master Special Assessment Allocation Report*, dated June 18, 2021 (**“Master Report”**), and is being presented in anticipation of financing a portion of the District’s Capital Improvement Plan (as described herein) as set forth in the *Supplemental Engineer’s Report* (the improvements described therein, the **“2021 Project”**), by the Summit View Community Development District, a local unit of special purpose government established pursuant to Chapter 190, Florida Statutes. The District will issue Special Assessment Bonds, Series 2021A and Series 2021B (together, the **“Series 2021 Bonds”**), and has retained Rizzetta & Company, Inc. to prepare a methodology for allocating the special assessments related to the District’s 2021 Project. This report will detail the preliminary financing and assessment allocation of the Series 2021 Bonds expected to fund a portion of the District’s 2021 Project.

II. DEFINED TERMS

“Capital Improvement Program” – (or CIP) Construction and/or acquisition of public infrastructure planned for the District. The total cost for the Capital Improvement Program is estimated to be \$7,206,850.90 as specified in the Amended and Restated Master Engineer’s Report dated June 18, 2021. (Engineer’s Report)

“Developer” – Summit View, LLC as master developer and initial landowner.

“District” – Summit View Community Development District.

“End User” – The ultimate purchaser of a fully developed residential unit; typically, a resident homeowner.

“Equivalent Assessment Unit” or “EAU” – Allocation factor which reflects a quantitative measure of the amount of special benefit conferred by the District’s CIP on a particular land use, relative to other land uses.

“Indentures” – The Master Trust Indenture dated as of July 1, 2021, the First Supplemental Trust Indenture dated as of July 1, 2021 and the Second Supplemental Trust Indenture dated as of July 1, 2021.

“Platted Units” – Lands configured into their intended end-use and subject to a recorded plat.

“Series 2021A Assessments” – The special assessments, as contemplated by Chapters 190, 170, and 197, Florida Statutes, levied to secure repayment of the District’s Series 2021A Bonds.



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“Series 2021A Bonds” – The \$3,455,000 (estimated) Summit View Community Development District Special Assessment Bonds, Series 2021A (2021 Project).

“Series 2021B Assessments” – The special assessments, as contemplated by Chapters 190, 170, and 197, Florida Statutes, levied to secure repayment of the District’s Series 2021B Bonds.

“Series 2021B Bonds” – The \$2,550,000 (estimated) Summit View Community Development District Special Assessment Bonds, Series 2021B (2021 Project).

“Series 2021 Project” – A portion of the District’s CIP that will be partially funded with Series 2021A Bonds and 2021B Bonds.

“True-Up Agreement” – The Agreement to be executed between the Summit View Community Development District and the Developer, regarding the True-Up and Payment of Series 2021A Assessments and Series 2021B Assessments.

“Unplatted Parcels” – Undeveloped lands or parcels not yet subject to a recorded plat in their final end-use configuration.

III. DISTRICT INFORMATION

The District was established by the City Commission of Dade City, pursuant to City Ordinance No. 2005-0894 which ordinance became effective on July 12, 2005. The District encompasses approximately 135.35 acres, is located within Dade City and lies entirely in Section 32, Township 24 South, Range 21. The District is approximately 1 mile +/- north of State Road 52 on the east side of Happy Hill Road. The current development plan for the District includes approximately 396 residential units. It is anticipated that 185 residential units within the boundaries of the District will be subject to the Series 2021A and Series 2021B Assessments; however, the Capital Improvement Plan, including the Series 2021 Project, benefits all developable acreage in the District

Table 1 illustrates the District’s preliminary development plan.

IV. SERIES 2021 PROJECT

The Series 2021 Project is a portion of the District’s Capital Improvement Program necessary for the development of the community. The cost of the Series 2021 Project is estimated to be \$7,206,850.90, and the District plans to issue Series 2021A and Series 2021B Bonds to partially fund the Series 2021 Project. The Series 2021A bonds are estimated to be \$3,455,000 and the estimate for the Series 2021B is \$2,550,000. The balance of the Series 2021 Project will be funded by the Developer, future bonds or other funding sources. For more detailed information regarding the Series 2021 Project, see Table 2 and the Supplemental Engineer’s Report, dated June 18, 2021.



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V. SERIES 2021A BONDS AND ASSESSMENTS

In order to provide for the Series 2021 Project funding described in Section IV above, the District will issue the Series 2021A Bonds in the estimated principal amount of \$3,455,000 which will be secured by the pledged revenues from Series 2021A Assessments. The Series 2021A Assessments will initially be levied in the estimated principal amount of \$3,455,000 and shall be structured in the same manner as the Series 2021A Bonds, so that revenues from the Series 2021A Assessments are sufficient to fulfill the debt service requirements for the Series 2021A Bonds.

The Series 2021A Bonds will be structured as amortizing current-interest bonds, with repayment occurring in annual installments of principal and interest. Interest payment dates shall occur every May 1 and November 1 from the date of issuance until final maturity on May 1, 2052. The first scheduled payment of coupon interest will be due on November 1, 2021, although interest will be capitalized through May 1, 2022, with the first installment of principal due on May 1, 2023. The annual principal payment will be due each May 1 thereafter until final maturity with the maximum annual debt service is estimated to be \$218,500. The preliminary general financing terms of Series 2021A Bonds are summarized on Table 4.

It is expected that the Series 2021A Assessment installments initially be levied on the gross acreage of the entire district and will only be assigned to lots once the lots are both developed and platted. Once lots are developed and platted, Series 2021A Assessment installments assigned to the Platted Units will be collected via the Pasco County property tax bill process (Uniform Method)¹. Accordingly, the Series 2021A Assessments have been adjusted to allow for current county collection costs and the possibility that landowners will avail themselves of early payment discounts. Currently, the aggregate rate for costs and discounts is 6.0%, but this may fluctuate as provided by law. The Unplatted Parcels are expected to be collected directly by the District, and will not include any county collection costs or early payment discounts. However, for purposes of this Report, all units are inclusive of the associated costs and discounts for presentation purposes only.

1, 2052. The first scheduled payment of coupon interest will be due on November 1, 2021, although interest will be capitalized through May 1, 2022, with the first installment of principal due on May 1, 2023. The annual principal payment will be due each May 1 thereafter until final maturity with the maximum annual debt service is estimated to be \$218,500. The preliminary general financing terms of Series 2021A Bonds are summarized on Table 4.

¹ The ultimate collection procedure is subject to District approval. Nothing herein should be construed as mandating collections that conflict with the terms, privileges, and remedies provided in the Indentures, Florida law, assessment resolutions, and/or other applicable agreements.



VI. SERIES 2021B BONDS AND ASSESSMENTS

The Series 2021B Bonds will be secured by the pledged revenues from the Series 2021B Assessments. The Series 2021B Assessments will initially be levied in the principal amount of \$2,550,000, and shall be structured in the same manner as the Series 2021B Bonds, so that revenues from the Series 2021B Assessments are sufficient to fulfill the debt service requirements for the Series 2021B Bonds.

There will be no scheduled principal payments for the Series 2021B Bonds until the final maturity date, at which time the outstanding principal amount will be due. It is expected that all or a portion of the Series 2021B Bonds will be redeemed prior to maturity. Interest payments shall occur every May 1 and November 1 from the date of issuance until final maturity on November 1, 2032. The first scheduled payment of coupon interest will be due on November 1, 2021, though the interest will be capitalized for twelve months. The maximum annual interest payment will be \$121,125. The general financing terms of the Series 2021B Bonds are summarized on Table 5.

VII. SERIES 2021A ASSESSMENT ALLOCATION

The Series 2021A Assessments are expected to ultimately be allocated to the first 185 Platted Units, as shown on Table 7. The Series 2021A Assessments are allocated based on an EAU methodology, as defined in this Report, and as allocated, the Series 2021A Assessments fall within the cost/benefit thresholds and are fairly and reasonably allocated among the different product types.

The preliminary Series 2021A Assessment Roll is located at page A-8.

A. The Series 2021A Assessments

Table 7 reflects the Series 2021A Assessments per Platted Unit. The Series 2021A Assessments will initially be levied on all of the gross acres in the District on an equal assessment per acre basis, but as land is either sold in bulk to third parties, or as land is platted or otherwise subdivided into Platted Units, the Series 2021A Assessments will be assigned to the gross acres as described in the Master Report or assigned to those Platted Units at the per-unit amounts described in Table 7, on a first developed, first platted and first assigned basis, thereby reducing the Series 2021A Assessments encumbering the Unplatted Parcels by a corresponding amount. The Series 2021A Bonds and the Series 2021A Assessments are expected to be assigned to the first 185 Platted Units.

As allocated, the Series 2021A Assessments fall within the cost/benefit thresholds, as well as the Maximum Special Assessment levels, established by the Master Report, and are fairly and reasonably allocated among the different product types.



In the event an Unplatted Parcel is sold to a party not affiliated with the Developer, Series 2021A Assessments will be assigned to that Unplatted Parcel based on the maximum total number of Platted Units assigned by the Developer to that Unplatted Parcel. The owner of that Unplatted Parcel will be responsible for the total assessments applicable to the Unplatted Parcel, regardless of the total number of Platted Units ultimately platted. These total assessments are fixed to the Unplatted Parcel at the time of the sale. If the Unplatted Parcel is subsequently subdivided into smaller parcels, the total assessments initially allocated to the Unplatted Parcel will be re-allocated to the smaller parcels pursuant to the methodology as described herein (i.e., equal assessment per acre until platting).

B. The Series 2021B Assessments

Table 8 reflects the Series 2021B Assessments per Platted Unit. The Series 2021B Assessments will initially be levied on all of the gross acres in the District on an equal assessment per acre basis, but as land is either sold in bulk to third parties, or as land is platted or otherwise subdivided into platted units, the Series 2021B Assessments will be assigned to the gross acres as described in the Master Report or assigned to those Platted Units at the per-unit amounts described in Table 8, on a first developed, first platted, first assigned basis, thereby reducing the Series 2021B Assessments encumbering the Unplatted Parcels by a corresponding amount. The Series 2021B Bonds and the Series 2021B Assessments are expected to be assigned to the first 185 residential platted units. This Series 2021B Assessment assignment will precede any future bond debt or assessments on land within the District..

As allocated, the Series 2021B Assessments fall within the cost/benefit thresholds, as well as the Maximum Special Assessment levels, established by the Master Report, and are fairly and reasonably allocated among the different product types.

In the event an Unplatted Parcel is sold to a party not affiliated with the Developer, Series 2021B Assessments will be assigned to that Unplatted Parcel based on the maximum total number of Platted Units assigned by the Developer to that Unplatted Parcel. The owner of that Unplatted Parcel will be responsible for the total assessments applicable to the Unplatted Parcel, regardless of the total number of Platted Units ultimately, actually platted. These total assessments are fixed to the Unplatted Parcel at the time of the sale. If the Unplatted Parcel is subsequently subdivided into smaller parcels, the total assessments initially allocated to the Unplatted Parcel will be re-allocated to the smaller parcels pursuant to the methodology as described herein (i.e., equal assessment per acre until platting).



As noted in the Engineer's Report and the Master Methodology Report, the District's entire CIP – which includes the 2021 Project Phase 1A and Phase 2B, functions as a master system of improvements benefitting all lands within the District. The Series 2021A Assessments and Series 2021B Assessments are fairly and reasonably allocated across all Platted Units and Unplatted Parcels.

The Preliminary Series 2021 Assessment Roll is located on page A-8.

VIII. PREPAYMENT AND TRUE UP OF SERIES 2021 ASSESSMENTS

The Series 2021A Assessments and Series 2021B Assessments encumbering a parcel may be prepaid in full at any time, without penalty, together with interest at the rate on the corresponding Series 2021 Bonds to the bond interest payment date that is more than forty-five (45) days next succeeding the date of prepayment. Notwithstanding the preceding provisions, the District does not waive the right to assess penalties which would otherwise be permissible if the parcel being prepaid is subject to an assessment delinquency.

Because this methodology assigns defined, fixed assessments to Platted Units, the District's Series 2021A and B Assessment program is predicated on the development of lots in the manner described in Table 1. However, if a change in development results in net decrease in the overall principal amount of assessments able to be assigned to the units described in Table 1, then a true-up, or principal reduction payment, will be required to cure the deficiency ("True Up Payment"). As the acreage within the District is developed, it will be platted. At such time as a plat is presented to the District and continuing at each time when a subsequent plat is presented to the District (each such date being a "True-Up Date"), the District shall determine if the debt per acre remaining on the unplatted, developable land is greater than the debt per acre of such land at the time of imposition of the initial assessment and, if it is, a True-Up Payment in the amount of such excess, plus accrued interest, shall become due and payable by the Developer in that tax year, prior to the time the plat is recorded, in accordance with this Report. The District will ensure collection of such amounts in a timely manner in order to meet its debt service obligations and, in all cases, the Developer and/or applicable landowner agrees that such payments shall be made in order to ensure the District's timely payments of the debt services obligations on the Series 2021A and Series 2021B Bonds. The District shall record all True-Up Payments in its Improvement Lien book. For further detail and definitions related to the true-up process, please refer to the True-Up Agreement expected to be entered into between the District and the Developer. Similarly, if a reconfiguration of lands would result in the collection of substantial excess assessment revenue in the aggregate, then the District shall undertake a pro rata reduction of assessments for all assessed properties.



IX. ADDITIONAL STIPULATIONS

Certain financing, development, and engineering data was provided by members of District staff and/or the Developer. The allocation methodology described herein was based on information provided by those professionals. Rizzetta & Company, Incorporated makes no representations regarding said information beyond restatement of the factual information necessary for compilation of this report. If there is anything contained in the Master Special Assessment Report that is inconsistent with the provisions of this report, the provisions of this report shall govern. For additional information on the Series 2021 Bond structure and related items, please refer to the Preliminary Limited Offering Memorandum associated with this transaction.

Rizzetta & Company, Incorporated, does not represent the District as a Municipal Advisor or Securities Broker nor is Rizzetta & Company, Incorporated, registered to provide such services as described in Section 15B of the Securities and Exchange Act of 1934, as amended. Similarly, Rizzetta & Company, Incorporated, does not provide the District with financial advisory services or offer investment advice in any form.



Rizzetta & Company

PRELIMINARY ALLOCATION METHODOLOGY



Rizzetta & Company

**SUMMIT VIEW
COMMUNITY DEVELOPMENT DISTRICT
SPECIAL ASSESSMENT BONDS, SERIES 2021
(2021 PROJECT)**

TABLE 1: SERIES 2021 PROJECT AREA DEVELOPMENT PLAN

PRODUCT	2021 Project Phase 1	
Single Family 40'	82	Units
Single Family 50'	72	Units
Single Family 60'	31	Units
TOTAL:	185	

**SUMMIT VIEW
COMMUNITY DEVELOPMENT DISTRICT
SPECIAL ASSESSMENT BONDS, SERIES 2021
(2021 PROJECT)**

TABLE 2: TOTAL 2021 PROJECT COST DETAIL

IMPROVEMENTS	Master	2021 Project Phase 1	TOTAL 2021 PROJECT
Roadways	\$532,439.00	\$783,520.29	\$1,315,959.29
Stormwater Management	\$122,497.00	\$2,528,686.05	\$2,651,183.05
Utilities (Water and Sewer)	\$435,659.00	\$760,071.14	\$1,195,730.14
Utilities Commitment/Impact Fees	\$1,042,272.00	\$0.00	\$1,042,272.00
Hardscape/Landscape	\$0.00	\$83,300.00	\$83,300.00
Undergrounding of Conduit	\$0.00	\$52,800.00	\$52,800.00
Recreational Amenities, Walking Trails	\$0.00	\$49,000.00	\$49,000.00
Professional Services	\$84,575.00	\$0.00	\$84,575.00
Offsite Improvements	\$433,254.17	\$0.00	\$433,254.17
Contingency	\$0.00	\$298,777.25	\$298,777.25
Total Assessment Area One Costs	\$2,650,696.17	\$4,556,154.73	\$7,206,850.90
Series 2021 Project Funded by Series 2021A Bonds			\$2,873,833.00
Series 2021 Project Funded by Series 2021B Bonds			\$2,161,205.00
Additional Construction Costs Funded by Developer, Future Bonds or Other Sources			\$2,171,812.90
Total Construction Costs for 2021 Project			\$7,206,850.90

NOTE: Infrastructure cost estimates provided by District Engineer.

**SUMMIT VIEW
COMMUNITY DEVELOPMENT DISTRICT
SPECIAL ASSESSMENT BONDS, SERIES 2021
(2021 PROJECT)**

TABLE 3: FINANCING INFORMATION - 2021A BONDS

Issue Date		TBD
Final Maturity		5/1/2052
Principal Installments		30
Average Coupon Rate		4.750%
Maximum Annual Debt Service ("MADS")		\$218,500
SOURCES:		
	PAR AMOUNT	<u>\$3,455,000</u>
	Total Net Proceeds	\$3,455,000
USES:		
	Project Fund	(\$2,873,833)
	Debt Service Reserve Fund	(\$218,500) (1)
	Capitalized Interest (12 months)	(\$164,113)
	Costs of Issuance	<u>(\$198,555)</u>
	Total Uses	(\$3,455,000)
Source: District Underwriter		
(1) 100% of MADS		

TABLE 4: FINANCING INFORMATION SERIES 2021A ASSESSMENTS

Interest Rate		4.750%
Initial Principal Amount		\$3,455,000
Aggregate Annual Installment		\$218,500
Estimated County Collection Costs	2.00%	\$4,649 (1)
Maximum Early Payment Discounts	4.00%	<u>\$9,298 (1)</u>
Estimated Total Annual Installment		\$232,447
(1) May vary as provided by law.		

**SUMMIT VIEW
COMMUNITY DEVELOPMENT DISTRICT
SPECIAL ASSESSMENT BONDS, SERIES 2021
(2021 PROJECT)**

TABLE 5: FINANCING INFORMATION - 2021B BONDS

Issue Date		TBD
Final Maturity		5/1/2032
Principal Installments		10
Average Coupon Rate		4.750%
Maximum Annual Debt Service ("MADS")		\$121,125
SOURCES:		
	PAR AMOUNT	<u>\$2,550,000</u>
	Total Net Proceeds	\$2,550,000
USES:		
	Project Fund	(\$2,161,205)
	Debt Service Reserve Fund	(\$121,125) (1)
	Capitalized Interest (12 months)	(\$121,125)
	Costs of Issuance	<u>(\$146,545)</u>
	Total Uses	(\$2,550,000)
Source: District Underwriter		
(1) 100% of MADS		

TABLE 6: FINANCING INFORMATION SERIES 2021B ASSESSMENTS

Interest Rate		4.750%
Aggregate Initial Principal Amount		\$2,550,000.00
Aggregate Annual Installment		\$121,125.00
Estimated County Collection Costs	2.00%	\$2,577 (1)
Maximum Early Payment Discounts	4.00%	<u>\$5,154 (1)</u>
Estimated Total Annual Installment		\$128,856

(1) May vary as provided by law.

**SUMMIT VIEW
COMMUNITY DEVELOPMENT DISTRICT
SPECIAL ASSESSMENT BONDS, SERIES 2021
(2021 PROJECT)**

TABLE 7: ASSESSMENT ALLOCATION - SERIES 2021A-1 ASSESSMENTS

PRODUCT	UNITS (1)	EAU	PRODUCT TOTAL PRINCIPAL (2)	PER UNIT PRINCIPAL	PRODUCT ANNUAL INSTLMT. (2)(3)	PER UNIT INSTLMT. (3)
Single Family 40'	82	0.80	\$1,296,613	\$15,812	\$87,234	\$1,064
Single Family 50'	72	1.00	\$1,423,112	\$19,765	\$95,745	\$1,330
Single Family 60'	31	1.20	\$735,275	\$23,719	\$49,468	\$1,596
TOTAL	185		\$3,455,000		\$232,447	

(1) Series 2021A Assessments expected to be absorbed by the first 185 platted and developed units within the entire District.

(2) Product total shown for illustrative purposes and are not fixed by product type.

(3) Includes estimated Pasco County collection costs/payment discounts, which may fluctuate.

**SUMMIT VIEW
COMMUNITY DEVELOPMENT DISTRICT
SPECIAL ASSESSMENT BONDS, SERIES 2021
(2021 PROJECT)**

TABLE 8: ASSESSMENT ALLOCATION - SERIES 2021B ASSESSMENTS

PRODUCT	UNITS (1)	EAU	PRODUCT TOTAL PRINCIPAL (2)	PER UNIT PRINCIPAL	PRODUCT ANNUAL INSTLMT. (2)(3)	PER UNIT INSTLMT. (3)
Single Family 40'	82	0.80	\$956,979	\$11,670	\$48,358	\$590
Single Family 50'	72	1.00	\$1,050,343	\$14,588	\$53,076	\$737
Single Family 60'	31	1.20	\$542,677	\$17,506	\$27,423	\$885
TOTAL	185		\$2,550,000		\$128,856	

(1) Series 2021B Assessments expected to be absorbed by the first 185 platted and developed units within the District.

(2) Product total shown for illustrative purposes and are not fixed by product type.

(3) Includes estimated Pasco County collection costs/payment discounts, which may fluctuate. These assessments will be direct billed to the developer and are shown here should there be a need to add to tax rolls.

**SUMMIT VIEW
COMMUNITY DEVELOPMENT DISTRICT
SPECIAL ASSESSMENT BONDS, SERIES 2021
(2021 PROJECT)**

TABLE 9: ASSESSMENT ALLOCATION - SERIES 2021 ASSESSMENTS					
PRODUCT	UNITS ⁽¹⁾	PRODUCT TOTAL PRINCIPAL	PER UNIT PRINCIPAL ⁽²⁾	PRODUCT ANNUAL INSTLMT. ^{(2) (3)}	PER UNIT INSTLMT. ⁽³⁾
<u>Series 2021A</u>					
Single Family 40'	82	\$1,296,613	\$15,812	\$87,234	\$1,064
Single Family 50'	72	\$1,423,112	\$19,765	\$95,745	\$1,330
Single Family 60'	31	\$735,275	\$23,719	\$49,468	\$1,596
Total	185	\$3,455,000		\$232,447	
<u>Series 2021B</u>					
Single Family 40'	82	\$956,979	\$11,670	\$48,358	\$590
Single Family 50'	72	\$1,050,343	\$14,588	\$53,076	\$737
Single Family 60'	31	\$542,677	\$17,506	\$27,423	\$885
Total		\$2,550,000		\$128,856	
Grand Total	185	\$6,005,000		\$361,303	

(1) Series 2021A Assessments and Series 2021B Assessments expected to be absorbed by the first 185 platted and developed units within the District.
(2) Product total shown for illustrative purposes and are not fixed by product type.
(3) Includes estimated Pasco County collection costs/payment discounts, which may fluctuate.

**SUMMIT VIEW
COMMUNITY DEVELOPMENT DISTRICT
SERIES 2021 LIEN ROLL
(2021 Project Area)**

Parcel	Acreage	Max Principal/Acre	Max Annual/Acre
2021A	135.35	\$25,526.41	\$1,717.38
2021B	135.35	\$18,840.04	\$952.02
	Total	\$44,366.46	\$2,669.40
* See attached legal description			

LEGAL DESCRIPTION

THE SOUTH 1/2 OF THE SOUTHWEST 1/4 OF THE NORTHEAST 1/4; THE NORTHEAST 1/4 OF THE NORTHWEST 1/4 OF THE SOUTHEAST 1/4; THE NORTHWEST 1/4 OF THE NORTHWEST 1/4 OF THE SOUTHEAST 1/4; THE SOUTHWEST 1/4 OF THE NORTHWEST 1/4 OF THE SOUTHEAST 1/4, AND THE NORTH 1/2 OF THE NORTHWEST 1/4 OF THE SOUTHWEST 1/4 OF THE SOUTHEAST 1/4; THE NORTHEAST 1/4 OF THE SOUTHWEST 1/4; THE NORTH 1/4 OF THE SOUTHEAST 1/4 OF THE SOUTHWEST 1/4; THE NORTHEAST 1/4 OF THE NORTHWEST 1/4 OF THE SOUTHWEST 1/4, AND THE SOUTH 1/2 OF THE NORTHWEST 1/4 OF THE SOUTHWEST 1/4 ALL IN SECTION 32, TOWNSHIP 24 SOUTH, RANGE 21 EAST, ALL OF SAID PROPERTY BEING SITUATE IN PASCO COUNTY, FLORIDA.

Containing 135.35 acres, more or less.

SUBJECT TO ALL RIGHTS OF WAY FOR ROADS

Tab 9

RESOLUTION NO. 2021-32

A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE SUMMIT VIEW COMMUNITY DEVELOPMENT DISTRICT (THE “DISTRICT”) AUTHORIZING THE ISSUANCE OF NOT EXCEEDING IN TOTAL AGGREGATE PRINCIPAL AMOUNT OF \$8,000,000 CONSISTING OF ITS SUMMIT VIEW COMMUNITY DEVELOPMENT DISTRICT SPECIAL ASSESSMENT BONDS, SERIES 2021A (2021 PROJECT) ISSUED IN THE AGGREGATE PRINCIPAL AMOUNT OF NOT EXCEEDING \$4,500,000 AND ITS SUMMIT VIEW COMMUNITY DEVELOPMENT DISTRICT SPECIAL ASSESSMENT BONDS, SERIES 2021B (2021 PROJECT) ISSUED IN THE AGGREGATE PRINCIPAL AMOUNT OF NOT EXCEEDING \$3,500,000 (COLLECTIVELY, THE “BONDS”), TO FINANCE THE ACQUISITION AND IMPROVEMENT OF CERTAIN PUBLIC INFRASTRUCTURE; DETERMINING THE NEED FOR A NEGOTIATED LIMITED OFFERING OF THE BONDS AND PROVIDING FOR A DELEGATED AWARD OF SUCH BONDS; APPOINTING THE UNDERWRITER FOR THE OFFERING OF THE BONDS; APPROVING THE FORM OF AND AUTHORIZING THE EXECUTION AND DELIVERY OF A BOND PURCHASE CONTRACT WITH RESPECT TO THE BONDS; APPROVING THE FORMS OF AND AUTHORIZING THE EXECUTION AND DELIVERY OF A MASTER TRUST INDENTURE, A FIRST SUPPLEMENTAL TRUST INDENTURE AND A SECOND SUPPLEMENTAL TRUST INDENTURE SECURING THE BONDS; APPOINTING A TRUSTEE; APPROVING THE FORM OF AND AUTHORIZING THE DISTRIBUTION OF A PRELIMINARY LIMITED OFFERING MEMORANDUM; APPROVING THE EXECUTION AND DELIVERY OF A FINAL LIMITED OFFERING MEMORANDUM; APPROVING THE FORM OF AND AUTHORIZING THE EXECUTION OF A CONTINUING DISCLOSURE AGREEMENT, AND APPOINTING A DISSEMINATION AGENT; APPROVING THE APPLICATION OF BOND PROCEEDS; AUTHORIZING CERTAIN MODIFICATIONS TO THE ASSESSMENT METHODOLOGY REPORT; PROVIDING FOR THE REGISTRATION OF THE BONDS PURSUANT TO THE DTC BOOK-ENTRY ONLY SYSTEM; AUTHORIZING THE PROPER OFFICIALS TO DO ALL THINGS DEEMED NECESSARY IN CONNECTION WITH THE ISSUANCE, SALE AND DELIVERY OF THE BONDS; AND PROVIDING FOR SEVERABILITY, CONFLICTS AND AN EFFECTIVE DATE.

WHEREAS, the Summit View Community Development District (the “District”) is a local unit of special-purpose government organized and existing in accordance with the Uniform Community Development District Act of 1980, Chapter 190, Florida Statutes, as amended (the “Act”), created by Ordinance No. 2005-0894, duly enacted by the City Commission of the City of Dade City, Florida (the “City”), on June 28, 2005 and becoming effective July 12, 2005; and

WHEREAS, the District was created for the purpose of delivering certain community development services and facilities within and outside its jurisdiction; and

WHEREAS, the Board of Supervisors of the District (herein, the “Board”) has previously adopted Resolution No. 2005-19 on July 29, 2005 (the “Initial Bond Resolution”), pursuant to which the District authorized the issuance of not to exceed \$35,000,000 of its Special Assessment Bonds to be issued in one or more series to finance all or a portion of the District’s capital improvement program; and

WHEREAS, any capitalized term used herein and not otherwise defined shall have the meaning ascribed to such term in the Initial Bond Resolution; and

WHEREAS, pursuant to the 2021 Indenture (as defined below) and this Resolution, the Board hereby determines to issue its Summit View Community Development District Special Assessment Bonds, Series 2021A (2021 Project) in the aggregate principal amount of not exceeding \$4,500,000 (the “Series A Bonds”) and its Summit View Community Development District Subordinate Special Assessment Bonds, Series 2021B (2021 Project) in the aggregate principal amount of not exceeding \$3,500,000 (the “Series B Bonds” and, together with the Series A Bonds, the “Bonds”) for the purpose of financing the 2021 Project (as defined in the First and Second Supplemental Trust Indentures), funding capitalized interest, funding reserve accounts and paying the costs of issuance; and

WHEREAS, the Bonds are to be issued to finance a portion of the public infrastructure within the District, as described in the District’s *Amended and Restated Master Engineer’s Report* dated June 18, 2021, as such report may be supplemented from time to time (“Engineer’s Report”); and

WHEREAS, there has been submitted to this meeting with respect to the issuance and sale of the Bonds and submitted to the Board forms of:

(i) a Bond Purchase Contract with respect to the Bonds by and between FMSbonds, Inc., as the underwriter (the “Underwriter”) and the District, together with the form of a disclosure statement attached to the Bond Purchase Contract pursuant to Section 218.385, Florida Statutes, substantially in the form attached hereto as Exhibit A (the “Bond Purchase Contract”);

(ii) a Preliminary Limited Offering Memorandum substantially in the form attached hereto as Exhibit B (the “Preliminary Limited Offering Memorandum”);

(iii) a Continuing Disclosure Agreement between the District and the dissemination agent named therein, substantially in the form attached hereto as Exhibit C; and

(iv) the Master Trust Indenture (the “Master Indenture”), the First Supplemental Trust Indenture with respect to the Series A Bonds (the “First Supplemental”) and the Second Supplemental Trust Indentures with respect to the Series B Bonds (the “Second Supplement”), each by between the District and the Trustee (as herein defined), substantially in the forms attached hereto as Composite Exhibit D.

WHEREAS, in connection with the sale of the Bonds, it may be necessary that certain modifications be made to the *Master Special Assessment Allocation Report* (“Assessment Methodology Report”) to conform such reports to the final terms of the Bonds; and

WHEREAS, the proceeds of the Bonds shall also fund one or more debt service reserve accounts, pay capitalized interest, and pay the costs of the issuance of the Bonds.

NOW, THEREFORE, BE IT RESOLVED by the Board of Supervisors of the Summit View Community Development District (the “Board”), as follows:

Section 1. Negotiated Limited Offering of Bonds. The District hereby finds that because of the complex nature of assessment bond financings in order to better time the sale of the Bonds to secure better rates, it is necessary and in the best interest of the District that the Bonds, in the total aggregate principal amount of not exceeding \$8,000,000, comprising not exceeding in aggregate principal amount of \$4,500,000 for the Series A Bonds and not exceeding in aggregate principal amount of \$3,500,000 for the Series B Bonds, all be sold on a negotiated limited offering basis.

Section 2. Purpose. The District hereby determines it shall be in the best economic interest of the landowners and residents of the District to finance a portion of the 2021 Project.

Section 3. Sale of the Bonds. Except as otherwise provided in the last sentence of this Section 3, the proposal submitted by the Underwriter offering to purchase the Bonds at the purchase price established pursuant to the parameters set forth below and on the terms and conditions set forth in the Bond Purchase Contract (attached hereto as Exhibit A), are hereby approved and adopted by the District in substantially the form presented. Subject to the last sentence of this Section 3, the Chairperson (or, in the absence of the Chairperson, any other member of the Board) is hereby authorized to execute and deliver on behalf of the District, and the Secretary of the District is hereby authorized (if so required) to affix the Seal of the District and attest to the execution of the Bond Purchase Contract in substantially the form presented at this meeting. The disclosure statements of the Underwriter, as required by Section 218.385, Florida Statutes, to be delivered to the District prior to the execution of the Bond Purchase Contract, a copy of which is attached as an exhibit to the Bond Purchase Contract, will be entered into the official records of the District. The Bond Purchase Contract, in final form as determined by counsel to the District, the District’s Bond Counsel and the Chairperson, may be executed by the District without further action provided that (i) the Bonds mature not later than the permitted statutory period; (ii) the principal amount of the Bonds issued does not exceed \$8,000,000, comprising \$4,500,000 for the Series A Bonds and \$3,500,000 with respect to the Series B Bonds; (iii) if the Series A Bonds are subject to optional redemption which determination will be made on or before the sale date of the Series A Bonds, the first optional call date and the redemption price shall be determined prior to the execution of the Bond Purchase Contract; (iv) the purchase price to be paid by the Underwriter for the Bonds is not less than 98% of the principal amount of the Bonds issued (exclusive of any original issuance discount); and (v) the arbitrage yield on the Bonds shall not exceed 5.50%. The Series B Bonds shall not be subject to optional redemption.

Section 4. The Limited Offering Memorandum. The Limited Offering Memorandum, in substantially the form of the Preliminary Limited Offering Memorandum (as

herein defined and subject to the other conditions set forth herein) attached hereto as Exhibit B, with such changes as are necessary to conform to the details of the Bonds and the requirements of the Bond Purchase Contract, is hereby approved. The District hereby authorizes the execution of the Limited Offering Memorandum and the District hereby authorizes the Limited Offering Memorandum, when in final form, to be used in connection with the limited offering and sale of the Bonds. The District hereby authorizes and consents to the use by the Underwriter of a Preliminary Limited Offering Memorandum substantially in the form attached hereto as Exhibit B, in connection with the limited offering of the Bonds (the "Preliminary Limited Offering Memorandum"). The final form of a Preliminary Limited Offering Memorandum shall be determined by the Underwriter and the professional staff of the District, with final approval by the Chairperson (or any other member of the Board in the absence of the Chairperson). The Limited Offering Memorandum may be modified in a manner not inconsistent with the substance thereof and the terms of the Bonds as shall be deemed advisable by the Bond Counsel and counsel to the District, with final approval by the Chairperson (or any other member of the Board in the absence of the Chairperson). The Chairperson (or, in the absence of the Chairperson, any other member of the Board) is hereby further authorized to execute and deliver on behalf of the District, the Limited Offering Memorandum and any amendment or supplement thereto, with such changes, modifications and deletions as the member of the Board executing the same may deem necessary and appropriate with the advice of Bond Counsel and counsel to the District, with final approval by the Chairperson (or any other member of the Board in the absence of the Chairperson), such execution and delivery to be conclusive evidence of the approval and authorization thereof by the District. The District hereby authorizes the Chairperson (or, in the absence of the Chairperson, any other member of the Board) to deem "final" the Preliminary Limited Offering Memorandum except for permitted omissions all within the meaning of Rule 15c2-12 of the Securities Exchange Act of 1934 and to execute a certificate in that regard.

Section 5. Details of the Bonds. The proceeds of the Bonds shall be applied in accordance with the provisions of the applicable Supplemental Indenture. The Bonds shall mature in the years and in the amounts, bear interest at such rates and be subject to redemption, all as provided in the Indenture. The execution of the applicable Indenture shall constitute approval of such terms as set forth in the Indenture and this Resolution. The maximum aggregate principal amount of the Bonds authorized to be issued pursuant to this Resolution and the Indenture shall not exceed \$8,000,000 in the aggregate principal amount comprising of not exceeding \$4,500,000 in principle amount for the Series A Bonds and not exceeding \$3,500,000 in principal amount for the Series B Bonds.

Section 6. Continuing Disclosure; Dissemination Agent. The Board does hereby authorize and approve the execution and delivery of a Continuing Disclosure Agreement by the Chairperson (or, in the absence of the Chairperson, any other member of the Board) substantially in the form presented to this meeting and attached hereto as Exhibit C. The Continuing Disclosure Agreement is being executed by the District and the other parties thereto in order to assist the Underwriter in the marketing of the Bonds and compliance with Rule 15c2-12 of the Securities and Exchange Commission. Rizzetta & Company, Incorporated is hereby appointed the initial dissemination agent.

Section 7. Authorization of Execution and Delivery of the Master Indenture, the First Supplement and Second Supplement. The Master Indenture, the First Supplement and

Second Supplement are collectively referred to as the “2021 Indenture”. The District does hereby authorize and approve the execution by the Chairperson (or, in the absence of the Chairperson, the Vice Chairperson or any other member of the Board) and the Secretary and the delivery of the 2021 Indenture between each the District and the Trustee. The 2021 Indenture shall be substantially in the forms attached hereto as Composite Exhibit D and each is hereby approved, with such changes therein as are necessary or desirable to reflect the terms of the sale of the Bonds as shall be approved by the Chairperson (or, in the absence of the Chairperson, the Vice Chairperson, or any other member of the Board) executing the same, with such execution to constitute conclusive evidence of such officer’s approval and the District’s approval of any changes therein from the forms of the 2021 Indenture attached hereto as Composite Exhibit D.

Section 8. Authorization and Ratification of Prior Acts. All actions previously taken by or on behalf of District in connection with the issuance of the Bonds are hereby authorized, ratified and confirmed.

Section 9. Appointment of Underwriter. The Board hereby formally appoints FMSbonds, Inc., as the Underwriter for the Bonds.

Section 10. Appointment of Trustee. The Board hereby appoints Regions Bank to serve as trustee, paying agent, and registrar (collectively, the “Trustee”) under the 2021 Indenture.

Section 11. Book-Entry Only Registration System. The registration of the Bonds shall initially be by the book-entry only system established with The Depository Trust Company.

Section 12. Assessment Methodology Report. The Board hereby authorizes any modifications to the Assessment Methodology Report prepared by Rizzetta & Company, Incorporated in connection with the Bonds if such modifications are determined to be appropriate in connection with the issuance of the Bonds, including supplements thereto.

Section 13. Engineer’s Report. The Board hereby authorizes any modifications to the Engineer’s Report prepared by Florida Land Design & Permitting, in connection with the Bonds if such modifications are determined to be appropriate in connection with the issuance of the Bonds or modifications to the 2021 Project, including supplements thereto.

Section 14. Further Official Action. The Chairperson, the Vice Chairperson, the Secretary and each member of the Board and any other proper official or member of the professional staff of the District are each hereby authorized and directed to execute and deliver any and all documents and instruments and to do and cause to be done any and all acts and things necessary or desirable for carrying out the transactions contemplated by this Resolution. In the event that the Chairperson, the Vice Chairperson or the Secretary is unable to execute and deliver the documents herein contemplated, such documents shall be executed and delivered by the respective designee of such officer or official or any other duly authorized officer or official of the District herein authorized. The Secretary or any Assistant Secretary is hereby authorized and directed to apply and attest the official seal of the District to any agreement or instrument authorized or approved herein that requires such a seal and attestation.

Section 15. Severability. If any section, paragraph, clause or provision of this Resolution shall be held to be invalid or ineffective for any reason, the remainder of this Resolution

shall continue in full force and effect, it being expressly hereby found and declared that the remainder of this Resolution would have been adopted despite the invalidity or ineffectiveness of such section, paragraph, clause or provision.

Section 16. Inconsistent Proceedings. All resolutions or proceedings, or parts thereof, in conflict with the provisions hereof are to the extent of such conflict hereby repealed or amended to the extent of such inconsistency.

PASSED in public session of the Board of Supervisors of the Summit View Community Development District, this 18th day of June, 2021.

**SUMMIT VIEW COMMUNITY
DEVELOPMENT DISTRICT**

ATTEST:

By: _____
Name: _____
Title: _____

By: _____
Name: _____
Title: Chairperson, Board of Supervisors

EXHIBIT A

FORM OF BOND PURCHASE CONTRACT

EXHIBIT B

DRAFT COPY OF PRELIMINARY LIMITED OFFERING MEMORANDUM

EXHIBIT C

FORM OF CONTINUING DISCLOSURE AGREEMENT

COMPOSITE EXHIBIT D

**FORMS OF MASTER INDENTURE, FIRST SUPPLEMENT
AND SECOND SUPPLEMENT**

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