



Rizzetta & Company

Heritage Isle at Viera Community Development District

Board of Supervisors' Regular Meeting October 25, 2022

**District Office:
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Orlando, Florida 32819
407.472.2471**

www.heritageisleatvieracdd.org

HERITAGE ISLE AT VIERA COMMUNITY DEVELOPMENT DISTRICT

**Brevard County Government Center, Florida Room, located at 2725 Judge
Fran Jamieson Way, Viera, FL 32940**

Board of Supervisors	Jay Williams Bob Goldstein Kenneth Bonin Jon Smallegan Kenneth Walter	Board Supervisor Board Supervisor Board Supervisor Board Supervisor Board Supervisor
District Manager	Richard Hernandez	Rizzetta & Company, Inc.
District Counsel	Wes Haber	Kutak Rock LLP
District Engineer	Ana Saunders	BSE 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 (407) 472-2471. 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.

HERITAGE ISLE AT VIERA COMMUNITY DEVELOPMENT DISTRICT
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Mailing Address · 3434 Colwell Avenue, Suite 200, Tampa, Florida 33614

www.heritageisleatvieracdd.org

October 24, 2022

Board of Supervisors
**Heritage Isle at Viera Community
Development District**

REVISED AGENDA

Dear Board Members:

The regular meeting of the Board of Supervisors of the Heritage Isle at Viera Community Development District will be held on **Tuesday, October 25, 2022, at 10:30 a.m.** at the Brevard County Government Center, Florida Room, located at 2725 Judge Fran Jamieson Way, Viera, FL 32940. The following is the agenda for the meeting:

- 1. CALL TO ORDER/ROLL CALL**
- 2. PUBLIC COMMENT**
- 3. COMMUNITY UPDATES**
 - A. Brightview Community Update by Daniel Srein
 - B. Solitude Lake Management Update by Josh Taylor
 - C. Field Service Inspection Report by Bryan Schaub Tab 1
 - D. Monthly Report Update by Supervisor Ken Walter Tab 2
- 4. BUSINESS ADMINISTRATION**
 - A. Consideration of the Minutes of the Board of Supervisors'
Meeting held on August 23, 2022 Tab 3
- 5. BUSINESS ITEMS**
 - A. Presentation of Bond Refunding Timeline by
MBS Capital Markets Tab 4
 - B. Consideration of Investment Banking Agreement with
MBS Capital Markets Tab 5
 - C. Ratification of Fiscal Year 2022-2023 Insurance Proposal Tab 6
 - D. Consideration of Campus Suite Website Contract Addendum ... Tab 7
 - E. Discussion of Pressure Washing Sidewalks
 - F. Discussion of Numbering Small Wooden Bridges
 - G. Discussion of Fiscal Year 2021-2022 & 2022-2023 Review
- 6. STAFF REPORTS**
 - A. District Counsel
 - B. District Engineer
 - C. District Manager
- 7. SUPERVISOR REQUESTS AND COMMENTS**
- 8. 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 (407) 472-2471.

Very truly yours,

Richard Hernandez

Richard Hernandez

District Manager

cc: Wes Haber, Kutak Rock, LLP.

CALL TO ORDER / ROLL CALL

AUDIENCE COMMENTS ON AGENDA ITEMS

COMMUNITY UPDATES

TAB 1

HERITAGE ISLE AT VIERA CDD

LANDSCAPE INSPECTION REPORT



September 7, 2022
Rizzetta & Company
Bryan Schaub – Landscape Specialist



Rizzetta & Company
Professionals in Community Management

Summary & Grayson

General Updates, Recent & Upcoming Maintenance Event

- Monitor all Pines on property and report any declining conditions to the DM as soon as they are noticed. An inspection of the Pine trees at height should be completed.
- Fertilization events should be occurring the first week of October as the nitrogen ban lifts 10/1.
- The Tree Lifting Project over sidewalks, maintained areas and roadways, is ongoing.

The following are action items for Brightview to complete. Please refer to the item # in your response listing action already taken or anticipated time of completion. **Red text** indicates deficient from previous report. **Bold Red text** indicates deficient of more than a month. **Green text** indicates a proposal has been requested. **Blue text** indicates irrigation. Black Underlined text indicates Board information or decisions.

1. In the beds at the both ends of the park between Grayson & Camberly, remove the grassy weeds in the beds along the sidewalk. The grassy weeds have come back with the summer weather. These beds are candidates for enhancement.
2. In the beds at the north end of the park along Grayson, there are several dead Muhly Grasses near the Indian Hawthorn. Scheduled to be removed.
3. In the park between Grayson & Camberly, the trees need to be lifted over the sidewalks and maintained areas.
4. **In the park between Grayson & Camberly near the pergola, treat the Ornamental Grasses for Mites. Also, remove all volunteer grasses growing into the other plants.**
5. In the beds in the park in the west ROW of Egbert, remove all weeds in the plants including Pink Fuzzy Bean. (Pic 5 >)
6. Along the walk leading from the same park as above to Mendel Way, a bed was removed & turf was installed, professionally.
7. At the south end of the park in the west ROW of Egbert, the bed that was removed and turfed over still needs to have a couple of stumps that surfaced when the bed was removed, stump ground.
8. The bed at the eastern most bend of the sidewalk between Galindo and the pond along Wickham, detail the bed to the east of the sidewalk.
9. In the sidewalk area to the east of the south entrance that runs along the pond, diagnose and treat the stressed Hibiscus hedges and Firebush units.



Galindo, South Entrance & Bancroft

10. In the east ROW of Legacy at the south entrance, continue to treat the turf as it is thinning and chlorotic. If there is no improvement, this area is a possible candidate for a bed to sod enhancement.

11. The median bed at the south entrance was redone, professionally and the plant material looks healthy. The new design should improve line of sight significantly. (Pic 11)



12. Property-wide, remove any underperforming Annual Flowers and prep the beds for a new rotation.

13. Along the sidewalk that runs east from the south entrance along Wickham, detail the beds, including weeding, vine removal, and setting strong bed lines.

14. In the beds at the south end of the park in the NW corner of Bancroft & Halleck, remove new vines & weeds from the Schilling's Holly, Ornamental Grasses and Thryallis. (Pic 14 >)

15. In the same area, treat the Muhly Grasses for Cottony Scale.

16. In the same park, remove all suckers, water shoots, and low branching sites from the Live Oaks.

17. In the beds in the west ROW of Bancroft south of Gurrero, the Ornamental Grasses were treated & pruned. They look good.

18. At the north end of the same park, there was turf damage that appears to be caused by a vehicle parked on the turf.

19. At the park area between Floristana & Lovington, the Cypress trees were removed, irrigation repairs completed, and new sod installed.

20. Property-wide, treat all joint expansion crack weeds.

21. At the park between Newhall & Funston on the south pond bank, remove all suckers, water shoots and low branching sites from the deciduous trees.

22. In the same park on the north bank, remove a broken Cypress branch that is hanging in the tree. Looks to have snapped off from a high wind event. (Pic 22)



Carambola, North Gate & Pacheco

23. At the north entrance in the east ROW and adjacent to the sidewalk, investigate the berm area for an irrigation issue. (Pic 23 >)

24. In the same area, remove the grassy volunteers at the top of the berm.

25. In the east ROW of Legacy at the north entrance, until the bed is removed and resodded, rejuve cut the Dwarf Oleander on the bank of the pond and detail the bed. (Pic 25 >)

26. At the park between Anza & Van Ness, rejuve cut the Ornamental Grasses to allow herbicide applications for weeds. These beds are good candidates for reduction by removing the Ornamental Grasses, shrinking the bed footprints, and adding a small amount of plant material to keep the separation effect from the beds.

27. In the same park, remove all suckers, water shoots and low branches from the Live Oaks.

28. Tree lifting is ongoing. Several of the areas of concern have been addressed.

29. In the park between Sutro Heights & Pacheco, remove the vines and prune the dead out of the larger, Wax Myrtle shrubs.

30. In the same park, remove all suckers and water shoots in all beds. (Pic 30 >)

31. In the park between Vallejo & Le Conte, the turf continues to struggle and underperform. This is a great area for turf replacement.

32. Along Legacy just north of the Amenities Center, there are two small areas between the road and sidewalk that might have Chinch Bug. Investigate and treat if necessary.

33. Along Legacy, treat Nile Lily & Flax Lily for Tip Fungus.



34. Along Legacy north of the Amenities Center, there are multiple areas where the irrigation is spotty. Repairs have been scheduled.

35. In the east ROW of Legacy near the pump, investigate a dead spot in the Schilling's Holly. Remove dead material and treat.

36. Property-wide, detail all tree rings as needed.



37. Along Legacy on the top of the berm, remove all dead material in beds after herbicide applications. (Pic 37 >)

38. In the same beds, remove any volunteer Palms.

39. Along Legacy in the median and both ROWs, diagnose and treat the stressed/declining Pines.

40. In the west ROW of Legacy, continue to prune all Trees and hedges to achieve plant separation.

41. In the west ROW of Legacy, there is improvement in the turf conditions, but one area is still under performing. Improve the turf coverage and vigor as possible. Possible re-turfing area. (Pic 41 >)

42. Along the walkway in the east ROW of Legacy starting north of the guard house, continue to lift all trees over the sidewalks and maintained area. Also, prune all hedges and Trees to achieve plant separation.

43. In the east ROW of Legacy near the south entrance, there is a Ligustrum with a dead area. Diagnose, treat and remove dead material. (Pic 43 >)

44. In the east ROW of Legacy between the south entrance & the Amenities Center, remove vines from the Juniper beds.

45. In the east ROW of Legacy between Galindo & Camberly along the pond bank, detail the Ornamental Grasses. Removing vines and grassy weeds.

46. In the east ROW of Legacy between Savoy & Camberly, do what you can to prune back the overgrowing, large Juniper trees a bit more than the last pruning. These trees are great candidates for removal and replacement.



47. At the Savoy Drive entrance, remove a dead Indian Hawthorn.

48. In the same area in both ROWs prune the dead material out of the Schilling's Holly.

49. In the same area, detail several of the beds with Magnolia trees. Include removing suckers, weeding and setting strong bed lines.



Proposals

1. Brightview to generate a property-wide proposal to remove the old Annual Flowers, prep the beds and install a new fall rotation. Provide the board with a few seasonally appropriate selections. Include all cleanup, disposal, soil amendments, and irrigation additions and/or adjustments. (Pic 1 >)
2. At the north end of the park that is south of Gurrero, Brightview to generate a proposal to remove a damaged section of turf, prep the area and re-sod with matching sod. Include all cleanup, disposal, and irrigation adjustments or repairs. (Pic 2 >)



TAB 2

Heritage Isle at Viera CDD
Landscape Update/Current Events (August 2022- September 2022)

September 27, 2022

New HIRVA Landscaping Contract

On 23 September 2022, HIRVA announced that JUNIPER will be their new landscape contractor effective 1 January 2023. Although I have a personal opinion about their decision, we still have BrightView as our CDD landscape contractor for another year. However, I will say, we will now be facing some new operational challenges with two different landscapers on Heritage Isle property. (More to follow)

General Landscaping

All landscaping services have been affected by the rain. In September alone, we received over 12" of rain. The pumps have been suspended 13+ days. Daniel indicated that they should be caught up with the mowing, detail , weeding and pruning by the end of this month.

Irrigation

All irrigation repairs in parks 1&2 were completed during the week of 22 August. The cypress roots in park 2 required an extra day to remove. Homeowners were updated with two eblasts.

Due to the persistent rain, the irrigation system was suspended as appropriate. The pumps are in full operational status. As a scheduled maintenance action, Pump#2 received a clean out of the filtration system. This was previously approved by the board.

Isolation gate valve separation project- Daniel has recommended that this project be delayed until the November timeframe . This will allow him to have adequate irrigation resources to help isolate where the mainline gate valves are located. Also, these valves haven't been exercised in many years. If a leak were to occur, he wants to have adequate personnel to affect repairs immediately.

Mowing- all mowing was completed except for areas near the north gate as heavy rains interrupted mowing . Typically , Legacy Blvd gets mowed each Friday, but when we have significant rains they catch up on the following Tuesday when portions were not done.

Detailing- all detail work was delayed due to the heavy rain. Should be back on schedule by the end of the month.

Field Service Report- As of 12 September, the July report was 98% complete. Great job!

The September field service report has been received and is currently being worked by BrightView.

Heritage Isle at Viera CDD

Landscape Update/Current Events (September 2022 - October 2022)

October 14, 2022

We had very little damage from Hurricane Ian. On Legacy Blvd, we had two light fixtures that tilted over. The FPL customer desk indicated that due to the number of power outages from Ian, street light repairs were low priority. They are still tilting. I contacted the FPL point of contact. And hopefully they will have available staff to repair these two fixtures as soon as possible. More to follow.

Change in landscape contractor for HIRVA- As you probably are aware, HIRVA did not renew their landscape contract with BrightView. They hired Juniper instead. The clubhouse and HIDA are reviewing proposals from both BrightView and Juniper for their landscaping needs. In any event, we will have two different landscapers on property through 2023. The HIRVA will have Juniper, the CDD has BrightView. And sometime in the near future we will find out if HIDA retains BrightView or has a new contract with Juniper.

As the CDD board liaison for landscaping, it's obvious to me that certain operational issues must be addressed to ensure that maintenance schedules between BrightView and Juniper are synchronized so that property appearance remains consistent.

Irrigation operations will require an increased degree of cooperation. And other details will require discussion between the principles to ensure their landscape maintenance activity and schedules dovetail together to mitigate any finger pointing and any other misunderstanding with responsibilities.

We expect HIRVA to setup a transition meeting in the near future with all the principle personnel. More to follow.

General Landscaping- Ian had a minor impact on the landscape maintenance schedules. After Ian passed, they were in cleanup mode. We had branches, palm husks and other debris all along Legacy Blvd and in some parks. It was immediately cleaned up and back in business.

As of October, per the contract, mowing will be done twice per month during the fall/winter season.

Weeds- if there is one area where BrightView needs improvement, it's weed mitigation. They are refocusing the detail crew on the weeds especially along Legacy Blvd.

Field Inspection Report- the September report is 60% completed as of 12 October 2022.

Trees (loblolly pines)- this is an old item. We still have pine tree clustering issues along the west side of Legacy primarily between Ingalls and south Funston. It's to the point where our turf along that stretch is sun deprived which retards growth and negatively affects the overall health of the grass.

I have asked Daniel to address this tree issue at our next CDD meeting.

BUSINESS ADMINISTRATION

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.

**HERITAGE ISLE AT VIERA
COMMUNITY DEVELOPMENT DISTRICT**

The regular meeting of the Board of Supervisors of Heritage Isle at Viera Community Development District was held on **Tuesday, August 23, 2022, at 10:30 a.m.** at the Brevard County Government Center, Florida Room, located at 2725 Judge Fran Jamieson Way, Viera, FL 32940.

Present and constituting a quorum:

Jay Williams	Board Supervisor, Chairman
Bob Goldstein	Board Supervisor, Vice Chairman <i>(via phone)</i>
Ken Bonin	Board Supervisor, Assistant Secretary
Jon Smallegan	Board Supervisor, Assistant Secretary
Kenneth Walter	Board Supervisor, Assistant Secretary

Also present were:

Richard Hernandez	District Manager, Rizzetta & Co., Inc.
Wes Haber	District Counsel, Kutak Rock LLP
Ana Saunders	District Engineer, BSE Consultants
Bryan Schaub	Rizzetta & Co., Inc. <i>(via phone)</i>
Daniel Srein	Brightview
Josh Taylor	Solitude Lake Management
General Audience	Present <i>(in person & via teleconference)</i>

FIRST ORDER OF BUSINESS

Call to Order

Mr. Williams called the meeting to order and called the roll. Quorum was established.

SECOND ORDER OF BUSINESS

Audience Comments on Agenda Items

Mr. Hernandez opened the floor to audience comments.

Residents from the general audience addressed the Board of Supervisors regarding the following concerns.

-
- The pond's status on Anza Street and the work that Solitude Lake Management is conducting.
 - On Van Ness Drive in Phase 8, there is a mulch line issue.
 - Tree removal with ribbons.

THIRD ORDER OF BUSINESS

Community Updates

A. Hoover Pumping Systems Update

Supervisor Ken Walter provided an update on the replacement of the a/c pumps.

B. Brightview Community Update by Daniel Srein

Mr. Srein informed the Board regarding the community landscape updates:

- Irrigation has been suspended due to irrigation repairs.
- Wire issues due to a lightning storm at the beginning of August have been repaired.
- The line of sight on LeConte has been corrected.
- Golf carts have been going over the beds. Proposal #SO 7895289 has been submitted for the Board's review.
- The landscape inspection is 74% complete.

Supervisor Ken Walter commented on the tree plan regarding the tree replacement program.

C. Solitude Lake Management Update by Josh Taylor

Mr. Taylor provided a brief update on the pond across from the clubhouse; he stated the water had dropped, which was treated with a different chemical mix. In addition, the pond near the golf course can only have certain plants treated (native species are not treatable).

D. Field Service Report by Bryan Schaub

Mr. Schaub informed the Board of the following concerns regarding items in the Field Services Inspection Report dated July 12, 2022.

FOURTH ORDER OF BUSINESS

**Consideration of the Minutes of the
Board of Supervisors' Meeting Held on
March 22, 2022**

Mr. Williams presented the minutes of the Board of Supervisors' meeting held on March 22, 2022.

The Board requested to have more details minutes to reflect the length of the meetings. Mr. Haber advised the Board that the Florida Statutes require the meetings

to reflect the motions made during the meeting.

On Motion by Mr. Kenneth, seconded by Mr. Smallegan, with all in favor, the Board of Supervisors approved the Board of Supervisor Regular Meeting minutes held on May 24, 2022, as amended, for Heritage Isle at Viera Community Development District.

FIFTH ORDER OF BUSINESS

Ratification of the Operation and Maintenance Expenditures for May - July 2022

Mr. Hernandez reviewed the Operation and Maintenance Expenditures for May - July 2022.

Mr. Smallegan advised that a check was listed on the July 2022 Operation and Maintenance Expenditures package that should be removed in the amount of \$200,000.

On Motion by Mr. Williams, seconded by Mr. Smallegan, with all in favor, the Board of Supervisors ratified the operation and maintenance expenditures for May 2022 (\$48,630.43), June 2022 (\$42,724.91), and July 2022 (248,145.76), as amended, removing the \$200,000 check from the July 2022 package, for Heritage Isle at Viera Community Development District.

SIXTH ORDER OF BUSINESS

Acceptance of the Fiscal Year 2021 Audit Report

Mr. Hernandez noted that the audit had been sent to States as required. The audit was clean, there were no adverse findings, and the proper governmental accounting principles and practices were followed.

Supervisor ken Walter requested to conduct an internal controls review. Supervisor Jay Williams concluded that the internal control review will be included in the next audit.

No motion was taken.

SEVENTH ORDER OF BUSINESS

Discussion Regarding the LeConte Sidewalk & Back Gate

Ms. Saunders explained that the crack is perpendicular to the sidewalk, adjacent to the sidewalk panels. She advised the Board that she spray-painted the sidewalk as visible caution to residents. Based on Ms. Saunders' findings, she recommended having the sidewalk panel removed. Ms. Saunders will coordinate with District Staff to have the removed sidewalk panel repaired.

It was suggested to have a letter sent to notify residents of the District's plans to repair the sidewalk.

On Motion by Mr. Smallegan, seconded by Mr. Bonin, with all in favor, the Board of Supervisors approved having District Staff and District Engineer find a solution to repair the sidewalk for Heritage Isle at Viera Community Development District.

EIGHTH ORDER OF BUSINESS

Consideration of Legacy Blvd. Back Gate Proposal - Brightview

Mr. Srein advised the Board that he will send a revised proposal for #SO7895289 in the amount of \$2,036.86, which will replace the old bed of Ruellia with sod and extend the existing bed down to the back gate for security purposes.

No motion was taken.

NINTH ORDER OF BUSINESS

Public Hearing on Fiscal Year 2022-2023 Final Budget

Mr. Hernandez presented a budget presentation to the Board. He summarized the major projects completed throughout the Fiscal Year 2021-2022. He mentioned that the District will not utilize the carry-forward option going into the Fiscal year 2022-2023.

On a motion by Mr. Williams, seconded by Mr. Walter, with all in favor, the Board of Supervisors opened the public hearing on the Fiscal Year 2022-2023 Final Budget for the Heritage Isle at Viera Community Development District.

Resident 1: Questioned how the single-family 50' homes were assessed. Mr. Hernandez advised that each lot is assessed based on the home size.

Resident 2: Commended the Board of Supervisors for their input of effort into the Fiscal Year 2022-2023 budget. The resident also questioned if the reserve was included in the final budget, to which Mr. Hernandez responded with a yes. The resident also asked if a resident could expect increases in the future in approximately one to three years.

Mr. Hernandez asked if there were more questions, as there were none, and the public comment period was closed.

On a motion by Mr. Avelli, seconded by Mr. Benitez, with all in favor, the Board of Supervisors closed the public hearing on the Fiscal Year 2022-2023 Final Budget for the Heritage Isle at Viera Community Development District.

TENTH ORDER OF BUSINESS

**Consideration of Resolution 2022-03,
Adopting the Fiscal Year 2022-2023
Final Budget**

Mr. Hernandez presented Resolution 2022-03, Adopting the Fiscal Year 2022-2023 Final Budget. He advised that Resolution 2022-03 adopts the budget previously presented before the Board for approval.

On a motion by Mr. Williams, seconded by Mr. Smallegan, with all in favor, the Board of Supervisors adopted Resolution 2022-03, Adopting the Fiscal Year 2022-2023 Final Budget, for the Heritage Isle at Viera Community Development District.

ELEVENTH ORDER OF BUSINESS

**Public hearing on the Fiscal Year 2022-
2023 Special Assessments**

On a motion by Mr. Williams, seconded by Mr. Walter, with all in favor, the Board of Supervisors opened the public hearing on the Fiscal Year 2022-2023 Final Budget for the Heritage Isle at Viera Community Development District.

A question was proposed to change the language to explain the term special assessments for clarification purposes. Mr. Haber explained that the term special assessments were appropriately used in term of Florida Statutes law.

On a motion by Mr. Williams, seconded by Mr. Smallegan, with all in favor, the Board of Supervisors closed the public hearing on the Fiscal Year 2022-2023 Final Budget for the Heritage Isle at Viera Community Development District.

TWELFTH ORDER OF BUSINESS

**Consideration of Resolution 2022-04,
Imposing Special Assessments &
Certifying an Assessment Roll**

Mr. Hernandez presented Resolution 2022-04, Imposing Special Assessments and Certifying an Assessment Roll.

On a motion by Mr. Williams, seconded by Mr. Smallegan, with all in favor, the Board of Supervisors adopted Resolution 2022-04, Imposing Special Assessments and Certifying an Assessment Roll, for the Heritage Isle at Viera Community Development District.

THIRTEENTH ORDER OF BUSINESS

**Consideration of Resolution 2022-05,
Setting the Fiscal Year 2022-2023
Meeting Schedule**

Mr. Hernandez presented the proposed meeting schedule, which mirrors the same meeting occurrence from the Fiscal Year 2021-2022. A correction was noted on December 13, 2022

On a motion by Mr. Williams, seconded by Mr. Smallegan, with all in favor, the Board of Supervisors adopted Resolution 2022-05, Setting the Fiscal Year 2022-2023 Meeting Schedule, for the Heritage Isle at Viera Community Development District.

FOURTEENTH ORDER OF BUSINESS

**Consideration of the Third Addendum
to the Contract for Professional District
Services**

Mr. Hernandez presented the Third Addendum to the Board for their consideration. Mr. Hernandez advised that the contract amends the District contract with Rizzetta and Company to reflect the amended Schedule of Fees and Expenses listed on **Exhibit B**. Mr. Hernandez mentioned that the Third Addendum is already a budgeted item.

On a motion by Mr. Smallegan, seconded by Mr. Walter, with all in favor, the Board of Supervisors approved the Third Addendum to the Contract for Professional District Services for the Heritage Isle at Viera Community Development District.

FIFTEENTH ORDER OF BUSINESS

Staff Reports

A. District Counsel

No Report.

B. District Engineer

Ms. Saunders mentioned generating a traffic proposal for HIDA; as a professional curiosity, she wanted to notify the CDD Board.

C. District Manager

Mr. Hernandez notified the Board of the seats that are on the 2022 General

Election Ballot currently held by Jay Williams (Seat 1), Jon Smallegan (Seat 2), and Ken Walter (Seat 3). Mr. Hernandez mentioned that the Reserve Account is \$135,000 over budget, and the Operation and Maintenance Account is \$9,000 under budget.

SIXTEEN ORDER OF BUSINESS Supervisor Requests

Mr. Hernandez announced that the next meeting is scheduled for **Tuesday, October 25, 2022, at 10:30 a.m.**

SEVENTEENTH ORDER OF BUSINESS

Adjournment

<p>On Motion by Mr. Williams, seconded by Mr. Walter, with all in favor, the Board of Supervisors adjourned the meeting at 1:31 p.m. for Heritage Isle at Viera Community Development District.</p>

Secretary/Assistant Secretary

Chairman/Vice Chairman

BUSINESS ITEMS

TAB 4

Presented By: MBS Capital Markets



MBS CAPITAL MARKETS, LLC



Heritage Isle at Viera Community Development District

Brevard County, Florida

October 25, 2022



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OVERVIEW – SERIES 2013A BONDS



Overview of Series 2013A BONDS

- The Heritage Isle at Viera Community Development District (the “District”) issued its \$4,460,000 Special Assessment Revenue Refunding Bonds, Series 2013A-1 and 2013A-2 in March 2013 (the “Series 2013A Bonds”).
- The Series 2013A Bonds were issued to finance the cost of currently refunding and redeeming all the outstanding Series 2004A Bonds. The Series 2004A Bonds were issued to finance the public infrastructure improvements including, stormwater facilities, water distribution facilities, wastewater collection facilities, reuse distribution facilities, and landscape and hardscape facilities.
- The Series 2013 Bonds mature on May 1, 2035, and will be callable at the option of the District on or after May 1, 2023, at par. The interest rate on the Series 2013A Bonds ranges from 3.5 to 5.5%.
- The Series 2013A Bonds may be currently refunded on February 1, 2023 (90 days prior to the call date).
- The Series 2013A Bonds are secured by special assessments on 722 lots identified in the Final Supplemental Assessment Allocation Report dated March 22, 2013.
- Following is the status of the District’s Series 2013A Long-term Debt as of 9/1/2022.

Series	Outstanding Par	Average Coupon	Current Annual Debt Service	Call Provisions	Call Premium	Final Maturity
2013A-1	\$505,000	3.821%				5/1/2025
2013A-1	\$1,000,000	4.125%				5/1/2030
2013A-1	\$1,230,000	4.375%				5/1/2035
2013A-2	<u>\$330,000</u>	<u>5.50%</u>				5/1/2035
Total 2013A	\$3,065,000	4.395%	\$312,600	5/1/2023	At Par	



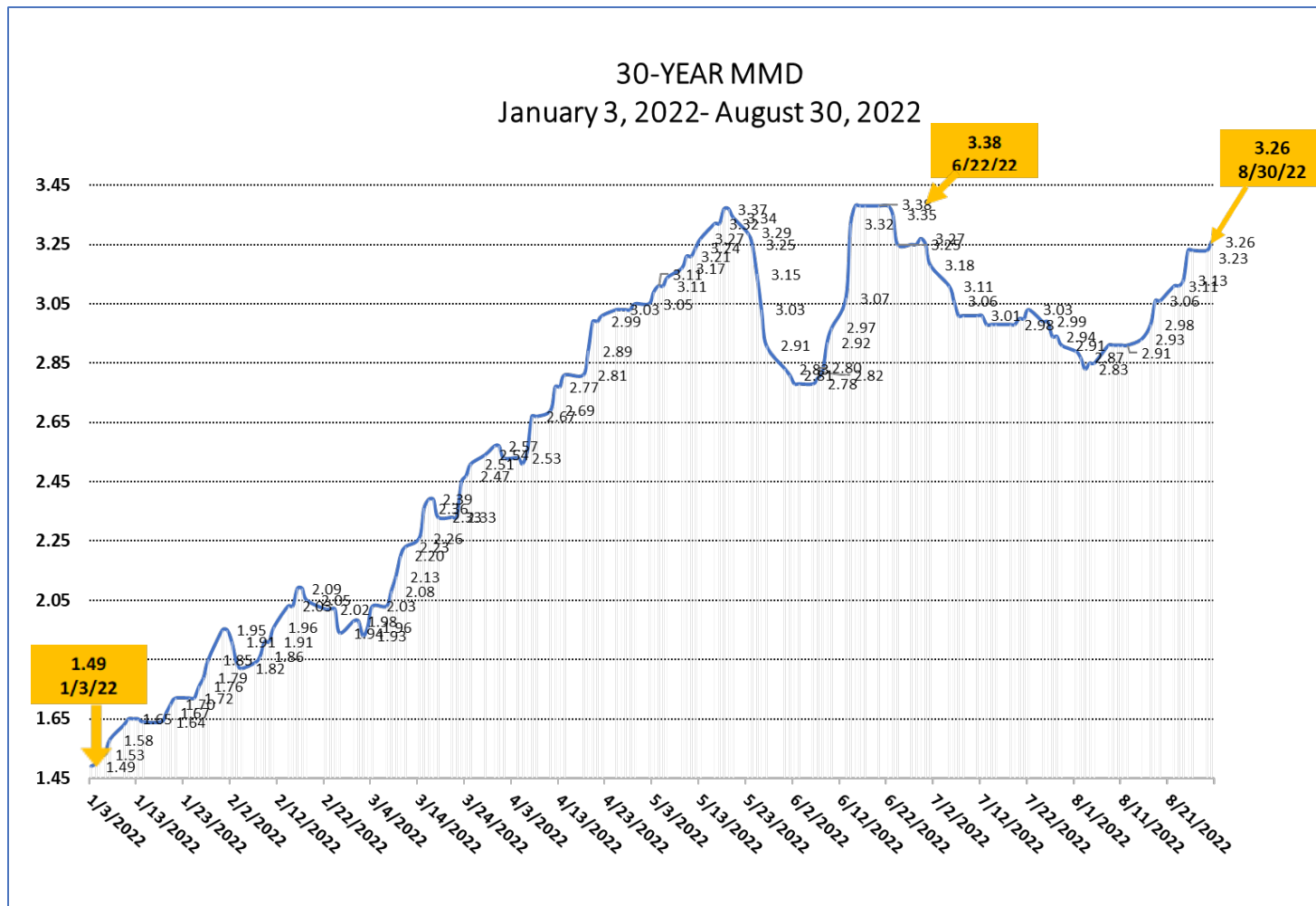
Overview of Series 2017 BONDS

- The Heritage Isle at Viera Community Development District (the “District”) issued its \$4,975,000 Special Assessment Revenue Refunding Bonds, Series 2017 in July 2017 (the “Series 2017 Bonds”).
- The Series 2017 Bonds were issued to finance the cost of currently refunding and redeeming all the outstanding Series 2005 Bonds. The Series 2005 Bonds were issued to acquire and construct a portion of the 2005 Project which included certain public master infrastructure improvements for Tracts C1, C2, D1, D2, E, F and G, which together comprise the North Tracts of the District. The 2005 project did not include any roads.
- The Series 2017 Bonds mature on May 1, 2037, and will be callable at the option of the District on or after May 1, 2027, at par. The interest rate on the Series 2017 Bonds ranges from 3.2 to 4.0%. The Series 2017 Bonds were rated BBB+ by Standard and Poor’s and later upgraded to AA following the issuance of the bond insurance policy provided by Assured Guaranty.
- **The Series 2017 Bonds may be currently refunded on February 1, 2027 (90 days prior to the call date).**
- The Series 2013A Bonds are secured by special assessments on 877 lots identified in the Final Supplemental Assessment Allocation Report dated June 29, 2017.
- Following is the status of the District’s Series 2017 Long-term Debt as of 9/1/2022.

Series	Outstanding Par	Average Coupon	Current Annual Debt Service	Call Provisions	Call Premium	Final Maturity
2017	\$1,370,000	4.0%				5/1/2028
2017	\$1,095,000	3.20%				5/1/2032
2017	<u>\$1,590,000</u>	<u>3.40%</u>				5/1/2037
Total 2017	\$4,055,000		\$370,323	5/1/2027	At Par	

Current Year MMD Chart

(Municipal Market Data)



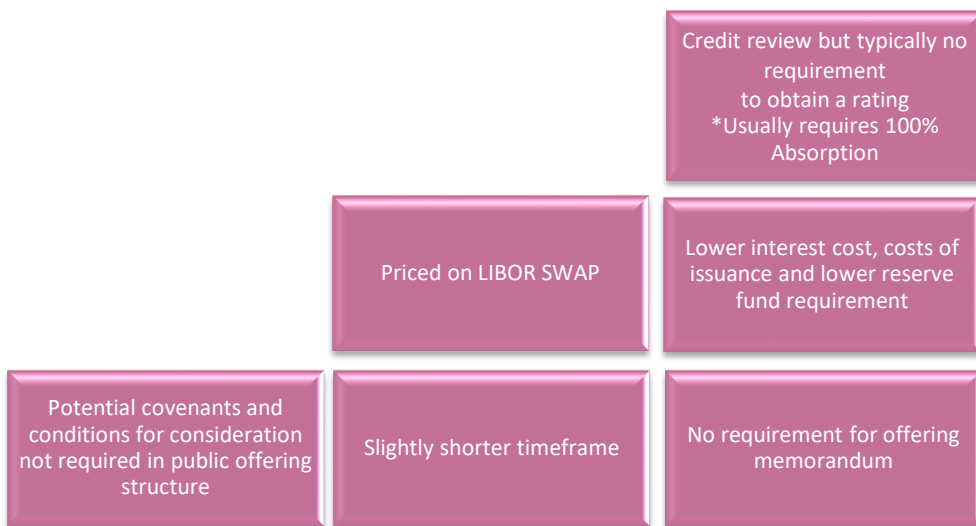


REFUNDING OPTIONS

Refunding Structures

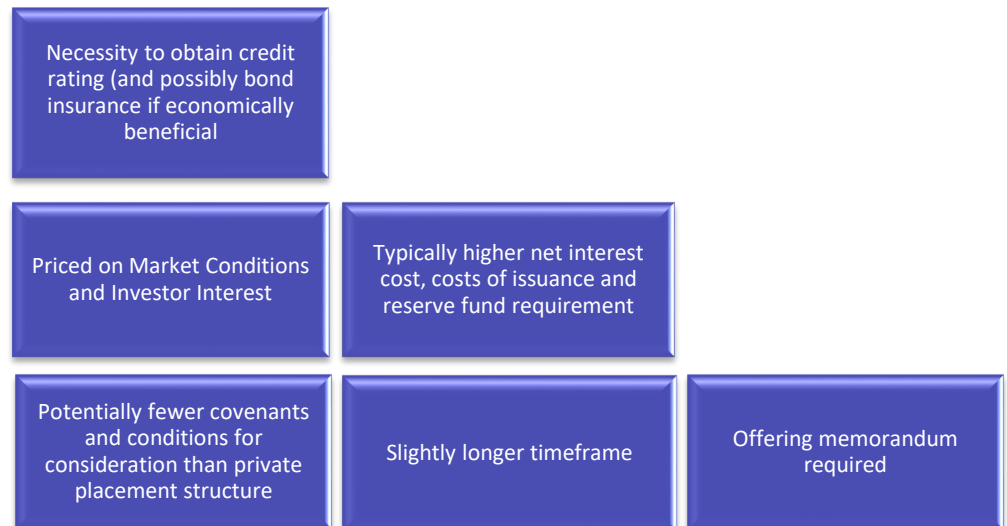
Bank Placement

Given the credit dynamics of the District's Bonds, this financing may lend itself to a bank placement.



Public Offering

MBS will pursue a dual-track process preparing for a public market offering at the same time as running a private placement process.



Next Steps (Public Offering)

Step 1: Engage the Financing Team to prepare necessary bond documents.

Step 2: Approve Preliminary Engineer's Report

Step 3: Approve Preliminary Assessment Methodology Report, Indenture and Bond Resolution (for validation)

Step 4: Due Diligence including research and credit work.

Step 5: Compile a credit package to submit to Rating Agency and Bond Insurer.

Step 6: Public Hearing on Assessments

Step 7: Bond Validation Hearing (30-day appeal period) (if required)

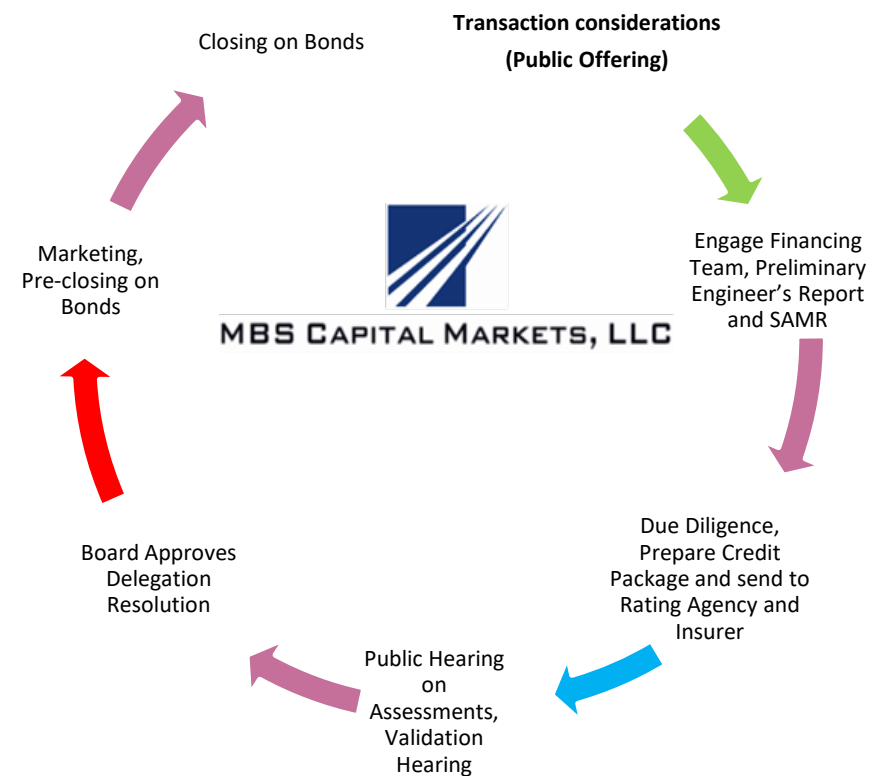
Step 8: Board approval of Delegation Resolution

Step 9: Marketing of Bonds

Step 10: Finalize Bond Documents

Step 11: Pre-closing, sign all bond documents.

Step 12: Close on Bonds



Timeline typically requires approximately 90-120 days to complete



Timetable – Public Offering

- **Day 1**
Board Meeting:
 - Engage Financing Team
 - Preliminary Engineer's Report
- **Day 30-35**
Board Meeting:
 - Preliminary Assessment Methodology Report
 - Indenture, Bond Resolution
 - Credit Package sent to Rating Agency and Insurer
- **Day 60-65**
Board Meeting:
 - Receive Indicative Bond Rating
- **Day 90-95**
Board Meeting:
 - Board Approves Delegation Resolution
- **Day 95-100**
Post PLOM
- **Day 100-105**
Market, Price Bonds
- **Day 106-120**
Preparation of Final Bond Documents
- **Day 120**
Board Meeting - Pre-closing on Bonds
- **Day 122**
Closing on Bonds (Target February 1, 2023)

Next Steps (Private Placement)

Step 1: Engage the Financing Team to prepare necessary bond documents.

Step 2: Approve Preliminary Engineer's Report

Step 3: Approve Preliminary Assessment Methodology Report, Indenture and Bond Resolution (for validation)

Step 4: Due Diligence including research and credit work.

Step 5: Compile a credit package to submit to interested Banks

Step 6: Public Hearing on Assessments

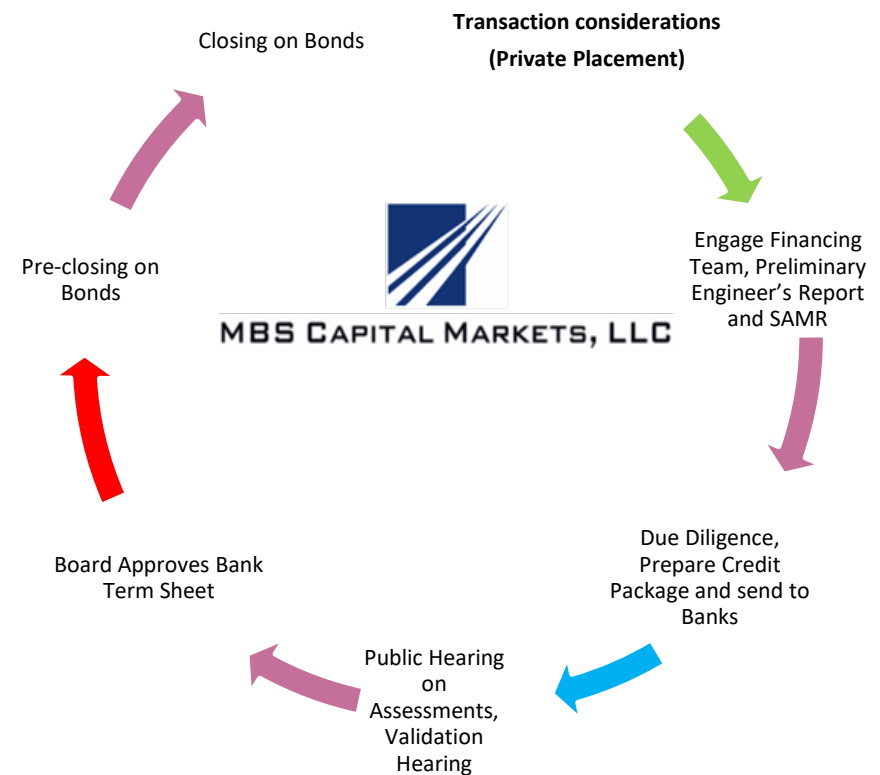
Step 7: Bond Validation Hearing (30-day appeal period) (if required)

Step 8: Board approval of Bank Term Sheet

Step 9: Finalize Bond Documents

Step 10: Pre-closing, sign all bond documents.

Step 11: Close on Bonds



Timeline typically requires approximately 80-90 days to complete



Timetable – Private Placement (Bank)

- **Day 1**
Board Meeting:
 - Engage Financing Team
 - Preliminary Engineer's Report
- **Day 30-35**
Board Meeting:
 - Preliminary Assessment Methodology Report
 - Indenture, Bond Resolution
 - Credit Package sent to interested Banks
- **Day 60-65**
Board Meeting:
 - Review and Approve Term Sheet from Bank
- **Day 65-80**
Preparation of Final Bond Documents
- **Day 90**
Board Meeting - Pre-closing on Bonds
- **Day 92**
Closing on Bonds (Target February 1, 2023)



Disclosures Regarding Underwriter's Role – MSRB Rule G-17

Disclosures Concerning the Underwriter's Role

- (i) MSRB Rule G-17 requires an underwriter to deal fairly at all times with both municipal issuers and investors.
- (ii) The underwriter's primary role is to purchase the Bonds with a view to distribution in an arm's-length commercial transaction with the Issuer. The underwriters has financial and other interests that differ from those of the District.
- (iii) Unlike a municipal advisor, the underwriter does not have a fiduciary duty to the District under the federal securities laws and are, therefore, is required by federal law to act in the best interests of the District without regard to their own financial or other interests.
- (iv) The underwriter has a duty to purchase the Bonds from the Issuer at a fair and reasonable price but must balance that duty with their duty to sell the Bonds to investors at prices that are fair and reasonable.
- (v) The underwriter will review the official statement for the Bonds in accordance with, and as part of, its respective responsibilities to investors under the federal securities laws, as applied to the facts and circumstances of this transaction.

Disclosure Concerning the Underwriter's Compensation

- The underwriter will be compensated by a fee and/or an underwriting discount that will be set forth in the bond purchase agreement to be negotiated and entered into in connection with the issuance of the Bonds. Payment or receipt of the underwriting fee or discount will be contingent on the closing of the transaction and the amount of the fee or discount may be based, in whole or in part, on a percentage of the principal amount of the Bonds. While this form of compensation is customary in the municipal securities market, it presents a conflict of interest since the underwriter may have an incentive to recommend to the District a transaction that is unnecessary or to recommend that the size of the transaction be larger than is necessary.



Disclosures Regarding Underwriter's Role – MSRB Rule G-17

Conflicts of Interest

- The Underwriter has not identified any additional potential or actual material conflicts that require disclosure including those listed below.
- Payments to or from Third Parties. There are no undisclosed payments, values, or credits to be received by the Underwriter in connection with its underwriting of this new issue from parties other than the District, and there are no undisclosed payments to be made by the Underwriter in connection with this new issue to parties other than the District (in either case including payments, values, or credits that relate directly or indirectly to collateral transactions integrally related to the issue being underwritten). In addition, there are no third-party arrangements for the marketing of the District's securities.
- Profit-Sharing with Investors. There are no arrangements between the Underwriter and an investor purchasing new issue securities from the Underwriter (including purchases that are contingent upon the delivery by the District to the Underwriter of the securities) according to which profits realized from the resale by such investor of the securities are directly or indirectly split or otherwise shared with the Underwriter.
- Credit Default Swaps. There will be no issuance or purchase by the Underwriter of credit default swaps for which the reference is the District for which the Underwriter is serving as underwriter, or an obligation of that District.
- Retail Order Periods. For new issues in which there is a retail order period, the Underwriter will honor such agreement to provide the retail order period. No allocation of securities in a manner that is inconsistent with a District's requirements will be made without the District's consent. In addition, when the Underwriter has agreed to underwrite a transaction with a retail order period, it will take reasonable measures to ensure that retail clients are bona fide.
- Dealer Payments to District Personnel. Reimbursements, if any, made to personnel of the District will be made in compliance with MSRB Rule G-20, on gifts, gratuities, and non-cash compensation, and Rule G-17, in connection with certain payments made to, and expenses reimbursed for, District personnel during the municipal bond issuance process.

Disclosures Concerning Complex Municipal Securities Financing

- Since the Underwriter has not recommended a "complex municipal securities financing" to the Issuer, additional disclosures regarding the financing structure for the Bonds are not required under MSRB Rule G-17.

TAB 5



MBS CAPITAL MARKETS, LLC

AGREEMENT FOR UNDERWRITING SERVICES HERITAGE ISLE AT VIERA COMMUNITY DEVELOPMENT DISTRICT

October 25, 2022

Board of Supervisors
Heritage Isle at Viera Community Development District

Dear Supervisors:

MBS Capital Markets, LLC (the “Underwriter”) offers to enter into this agreement (the “Agreement”) with the Heritage Isle at Viera Community Development District (the “District”) which, upon your acceptance of this offer, will be binding on the District and the Underwriter. This agreement relates to the proposed issuance of the District’s Series 2023 Bonds (the “Bonds”) for the purpose of refunding the District’s outstanding Series 2013 Bonds (the “Prior Bonds”). This Agreement will cover the engagement for the Bonds and will be supplemented for future bond issuances as may be applicable.

1. **Scope of Services:** MBS intends to serve as the underwriter, and not as a financial advisor or municipal advisor, in connection with the issuance of the Bonds. The scope of services to be provided in a non-fiduciary capacity by the Underwriter for this transaction will include those listed below.
 - Advice regarding the structure, timing, terms, and other similar matters concerning the particular municipal securities described above.
 - Preparation of rating strategies and presentations related to the issue being underwritten.
 - Preparations for and assistance with investor “road shows,” if any, and investor discussions related to the issue being underwritten.
 - Advice regarding retail order periods and institutional marketing if the District decides to engage in a negotiated sale.
 - Assistance in the preparation of the Preliminary Official Statement, if any, and the Final Official Statement.
 - Assistance with the closing of the issue, including negotiation and discussion with respect to all documents, certificates, and opinions needed for the closing.
 - Coordination with respect to obtaining CUSIP numbers and the registration with the Depository Trust Company.
 - Preparation of post-sale reports for the issue, if any.
 - Structuring of refunding escrow cash flow requirements, but not the recommendation of and brokerage of particular municipal escrow investments.

Member: FINRA/SIPC

Tampa, FL Winter Park, FL Kingston, TN Nashville, TN



MBS CAPITAL MARKETS, LLC

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 the greater of \$50,000 or 1.50% of the total par amount of Bonds issued.

The Underwriter shall also bear the cost of obtaining an investment grade rating with the actual cost of the rating to be paid from the proceeds of the Bonds only to the extent Bonds are issued.

3. **Termination:** Both the District and the Underwriter will have the right to terminate this Agreement without cause upon written notice to the non-terminating party.
4. **Purchase Contract:** At or before such time as the District gives its final authorization for the Bonds, the Underwriter and its counsel will deliver to the District a purchase or placement contract (the "Purchase Contract") detailing the terms of the Bonds.
5. **Notice of Meetings:** The District shall provide timely notice to the Underwriter for all regular and special meetings of the District. The District will provide, in writing, to the Underwriter, at least one week prior to any meeting, except in the case of an emergency meeting for which the notice time shall be the same as that required by law for the meeting itself, of matters and items for which it desires the Underwriter's input.
6. **Disclosures Concerning the Underwriter's Role Required by MSRB Rule G-17.** The Municipal Securities Rulemaking Board's Rule G-17 requires underwriters to make certain disclosures to issuers in connection with the issuance of municipal securities. Those disclosures are attached hereto as "Exhibit A." By execution of this Agreement, you are acknowledging receipt of the same. If you or any other Issuer officials 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 the Issuer's own financial and/or municipal, legal, accounting, tax and other advisors, as applicable, to the extent you deem appropriate. It is our understanding that you have the authority to bind the Issuer by contract with us, and that you are not a party to any conflict of interest relating to the subject transaction. If our understanding is incorrect, please notify the undersigned immediately.



MBS CAPITAL MARKETS, LLC

This Agreement shall be effective upon your acceptance hereof and shall remain effective until such time as the Agreement has been terminated in accordance with Section 3 hereof.

We are required to seek your acknowledgement that you have received the disclosures referenced herein and attached hereto as Exhibit A. By execution of this agreement, you are acknowledging receipt of the same.

Sincerely,
MBS Capital Markets, LLC

Rhonda Mossing

Rhonda Mossing
Managing Partner

Approved and Accepted By:

Title:

Date:



EXHIBIT A

Disclosures Concerning the Underwriter's Role

- (i) MSRB Rule G-17 requires an underwriter to deal fairly at all times with both municipal issuers and investors.
- (ii) The underwriter's primary role is to purchase the Bonds with a view to distribution in an arm's-length commercial transaction with the Issuer. The underwriters has financial and other interests that differ from those of the District.
- (iii) Unlike a municipal advisor, the underwriter does not have a fiduciary duty to the District under the federal securities laws and are, therefore, is required by federal law to act in the best interests of the District without regard to their own financial or other interests.
- (iv) The underwriter has a duty to purchase the Bonds from the Issuer at a fair and reasonable price but must balance that duty with their duty to sell the Bonds to investors at prices that are fair and reasonable.
- (v) The underwriter will review the official statement for the Bonds in accordance with, and as part of, its respective responsibilities to investors under the federal securities laws, as applied to the facts and circumstances of this transaction.

Disclosure Concerning the Underwriter's Compensation

The underwriter will be compensated by a fee and/or an underwriting discount that will be set forth in the bond purchase agreement to be negotiated and entered into in connection with the issuance of the Bonds. Payment or receipt of the underwriting fee or discount will be contingent on the closing of the transaction and the amount of the fee or discount may be based, in whole or in part, on a percentage of the principal amount of the Bonds. While this form of compensation is customary in the municipal securities market, it presents a conflict of interest since the underwriter may have an incentive to recommend to the District a transaction that is unnecessary or to recommend that the size of the transaction be larger than is necessary.

Conflicts of Interest

The Underwriter has not identified any additional potential or actual material conflicts that require disclosure including those listed below.



MBS CAPITAL MARKETS, LLC

Payments to or from Third Parties. There are no undisclosed payments, values, or credits to be received by the Underwriter in connection with its underwriting of this new issue from parties other than the District, and there are no undisclosed payments to be made by the Underwriter in connection with this new issue to parties other than the District (in either case including payments, values, or credits that relate directly or indirectly to collateral transactions integrally related to the issue being underwritten). In addition, there are no third-party arrangements for the marketing of the District's securities.

Profit-Sharing with Investors. There are no arrangements between the Underwriter and an investor purchasing new issue securities from the Underwriter (including purchases that are contingent upon the delivery by the District to the Underwriter of the securities) according to which profits realized from the resale by such investor of the securities are directly or indirectly split or otherwise shared with the Underwriter.

Credit Default Swaps. There will be no issuance or purchase by the Underwriter of credit default swaps for which the reference is the District for which the Underwriter is serving as underwriter, or an obligation of that District.

Retail Order Periods. For new issues in which there is a retail order period, the Underwriter will honor such agreement to provide the retail order period. No allocation of securities in a manner that is inconsistent with a District's requirements will be made without the District's consent. In addition, when the Underwriter has agreed to underwrite a transaction with a retail order period, it will take reasonable measures to ensure that retail clients are bona fide.

Dealer Payments to District Personnel. Reimbursements, if any, made to personnel of the District will be made in compliance with MSRB Rule G-20, on gifts, gratuities, and non-cash compensation, and Rule G-17, in connection with certain payments made to, and expenses reimbursed for, District personnel during the municipal bond issuance process.

Disclosures Concerning Complex Municipal Securities Financing

Since the Underwriter has not recommended a "complex municipal securities financing" to the Issuer, additional disclosures regarding the financing structure for the Bonds are not required under MSRB Rule G-17.

Irrigation- with all the rain towards the end of September and into November, the pumps were suspended. Now, the pumps have been brought back on line delivering irrigation throughout HI. All zones are operational.

Fertilization- once the moratorium time frame passes, BrightView will be applying a round of granular fertilizer.

We also expect BrightView to accomplish the boulder installation at the back gate real soon. It was delayed due to Ian.

Thank you.

TAB 6



Egis Insurance & Risk Advisors

Is pleased to provide a

Proposal of Insurance Coverage for:

Heritage Isle at Viera Community Development District

Please review the proposed insurance coverage terms and conditions carefully.

Written request to bind must be received prior to the effective date of coverage.

The brief description of coverage contained in this document is being provided as an accommodation only and is not intended to cover or describe all Coverage Agreement terms. For more complete and detailed information relating to the scope and limits of coverage, please refer directly to the Coverage Agreement documents. Specimen forms are available upon request.

About FIA

Florida Insurance Alliance ("FIA"), authorized and regulated by the Florida Office of Insurance Regulation, is a non-assessable, governmental insurance Trust. FIA was created in September 2011 at a time when a large number of Special Taxing Districts were having difficulty obtaining insurance.

Primarily, this was due to financial stability concerns and a perception that these small to mid-sized Districts had a disproportionate exposure to claims. Even districts that were claims free for years could not obtain coverage. FIA was created to fill this void with the goal of providing affordable insurance coverage to Special Taxing Districts. Today, FIA proudly serves and protects nearly 1,000 public entity members.

Competitive Advantage

FIA allows qualifying Public Entities to achieve broad, tailored coverages with a cost-effective insurance program. Additional program benefits include:

- Insure-to-value property limits with no coinsurance penalties
- First dollar coverage for "alleged" public official ethics violations
- Proactive in-house claims management and loss control department
- Complimentary risk management services including on-site loss control, property schedule verification and contract reviews
- Online Risk Management Education & Training portal
- Online HR & Benefits Support portal
- HR Hotline
- Safety Partners Matching Grant Program

How are FIA Members Protected?

FIA employs a conservative approach to risk management. Liability risk retained by FIA is fully funded prior to the policy term through member premiums. The remainder of the risk is transferred to reinsurers. FIA's primary reinsurers, Lloyds of London and Hudson Insurance Company, both have AM Best A XV (Excellent) ratings and surplus of \$2Billion or greater.

In the event of catastrophic property losses due to a Named Storm (i.e., hurricane), the program bears no risk as all losses are passed on to the reinsurers. FIA purchases property reinsurance to withstand the 1,000-year storm event (probability of exceedance .1%). This level of protection is statistically 2 to 3 times safer than competitors and industry norms.

What Are Members Responsible For?

As a non-assessable Trust, our members are only responsible for two items:

- Annual Premiums
- Individual Member Deductibles

FIA Bylaws prohibit any assessments or other fees.

Additional information regarding FIA and our member services can be found at www.fia360.org.

Quotation being provided for:

Heritage Isle at Viera Community Development District
c/o Rizzetta & Company
3434 Colwell Ave, Suite 200
Tampa, FL 33614

Term: October 1, 2022 to October 1, 2023

Quote Number: 100122627

PROPERTY COVERAGE

SCHEDULE OF COVERAGES AND LIMITS OF COVERAGE

COVERED PROPERTY	
Total Insured Values – Blanket Building and Contents – Per Schedule on file totalling	\$940,225
Loss of Business Income	\$1,000,000
Additional Expense	\$1,000,000
Inland Marine	
Scheduled Inland Marine	Not Included

It is agreed to include automatically under this Insurance the interest of mortgagees and loss payees where applicable without advice.

	Valuation	Coinsurance
Property	Replacement Cost	None
Inland Marine	Actual Cash Value	None

DEDUCTIBLES:	\$2,500	Per Occurrence, All other Perils, Building & Contents and Extensions of Coverage.
	3 %	Total Insured Values per building, including vehicle values, for "Named Storm" at each affected location throughout Florida subject to a minimum of \$10,000 per occurrence, per Named Insured.
	Per Attached Schedule	Inland Marine

Special Property Coverages		
Coverage	Deductibles	Limit
Earth Movement	\$2,500	Included
Flood	\$2,500 *	Included
Boiler & Machinery		Included
TRIA		Included

*Except for Zones A & V see page 8 (Terms and Conditions) excess of NFIP, whether purchased or not

TOTAL PROPERTY PREMIUM

\$5,137

Extensions of Coverage

If marked with an "X" we will cover the following EXTENSIONS OF COVERAGE under this Agreement, These limits of liability do not increase any other applicable limit of liability.

(X)	Code	Extension of Coverage	Limit of Liability
X	A	Accounts Receivable	\$500,000 in any one occurrence
X	B	Animals	\$1,000 any one Animal \$5,000 Annual Aggregate in any one agreement period
X	C	Buildings Under Construction	As declared on Property Schedule, except new buildings being erected at sites other than a covered location which is limited to \$250,000 estimated final contract value any one construction project.
X	D	Debris Removal Expense	\$250,000 per insured or 25% of loss, whichever is greater
X	E	Demolition Cost, Operation of Building Laws and Increased Cost of Construction	\$500,000 in any one occurrence
X	F	Duty to Defend	\$100,000 any one occurrence
X	G	Errors and Omissions	\$250,000 in any one occurrence
X	H	Expediting Expenses	\$250,000 in any one occurrence
X	I	Fire Department Charges	\$50,000 in any one occurrence
X	J	Fungus Cleanup Expense	\$50,000 in the annual aggregate in any one occurrence
X	K	Lawns, Plants, Trees and Shrubs	\$50,000 in any one occurrence
X	L	Leasehold Interest	Included
X	M	Air Conditioning Systems	Included
X	N	New locations of current Insureds	\$1,000,000 in any one occurrence for up to 90 days, except 60 days for Dade, Broward, Palm Beach from the date such new location(s) is first purchased, rented or occupied whichever is earlier. Monroe County on prior submit basis only
X	O	Personal property of Employees	\$500,000 in any one occurrence
X	P	Pollution Cleanup Expense	\$50,000 in any one occurrence
X	Q	Professional Fees	\$50,000 in any one occurrence
X	R	Recertification of Equipment	Included
X	S	Service Interruption Coverage	\$500,000 in any one occurrence
X	T	Transit	\$1,000,000 in any one occurrence
X	U	Vehicles as Scheduled Property	Included
X	V	Preservation of Property	\$250,000 in any one occurrence
X	W	Property at Miscellaneous Unnamed Locations	\$250,000 in any one occurrence
X	X	Piers, docs and wharves as Scheduled Property	Included on a prior submit basis only

X	Y	Glass and Sanitary Fittings Extension	\$25,000 any one occurrence
X	Z	Ingress / Egress	45 Consecutive Days
X	AA	Lock and Key Replacement	\$2,500 any one occurrence
X	BB	Awnings, Gutters and Downspouts	Included
X	CC	Civil or Military Authority	45 Consecutive days and one mile

CRIME COVERAGE

<u>Description</u>	<u>Limit</u>	<u>Deductible</u>
Forgery and Alteration	Not Included	Not Included
Theft, Disappearance or Destruction	Not Included	Not Included
Computer Fraud including Funds Transfer Fraud	Not Included	Not Included
Employee Dishonesty, including faithful performance, per loss	Not Included	Not Included

Deadly Weapon Protection Coverage

Coverage	Limit	Deductible
Third Party Liability	\$1,000,000	\$0
Property Damage	\$1,000,000	\$0
Crisis Management Services	\$250,000	\$0

AUTOMOBILE COVERAGE

Coverages	Covered Autos	Limit	Premium
Covered Autos Liability	8,9	\$1,000,000	Included
Personal Injury Protection	N/A		Not Included
Auto Medical Payments	N/A		Not Included
Uninsured Motorists including Underinsured Motorists	N/A		Not Included
Physical Damage Comprehensive Coverage	N/A	Actual Cash Value Or Cost Of Repair, Whichever Is Less, Minus Applicable Deductible (See Attached Schedule) For Each Covered Auto, But No Deductible Applies To Loss Caused By Fire or Lightning. See item Four for Hired or Borrowed Autos.	Not Included
Physical Damage Specified Causes of Loss Coverage	N/A	Actual Cash Value Or Cost Of Repair, Whichever Is Less, Minus Applicable Deductible (See Attached Schedule) For Each Covered Auto For Loss Caused By Mischief Or Vandalism See item Four for Hired or Borrowed Autos.	Not Included
Physical Damage Collision Coverage	N/A	Actual Cash Value Or Cost Of Repair, Whichever Is Less, Minus Applicable Deductible (See Attached Schedule) For Each Covered Auto See item Four for Hired or Borrowed Autos.	Not Included
Physical Damage Towing And Labor	N/A	\$0 For Each Disablement Of A Private Passenger Auto	Not Included

GENERAL LIABILITY COVERAGE (Occurrence Basis)

Bodily Injury and Property Damage Limit	\$1,000,000
Personal Injury and Advertising Injury	Included
Products & Completed Operations Aggregate Limit	Included
Employee Benefits Liability Limit, per person	\$1,000,000
Herbicide & Pesticide Aggregate Limit	\$1,000,000
Medical Payments Limit	\$5,000
Fire Damage Limit	Included
No fault Sewer Backup Limit	\$25,000/\$250,000
General Liability Deductible	\$0

PUBLIC OFFICIALS AND EMPLOYMENT PRACTICES LIABILITY (Claims Made)

Public Officials and Employment Practices Liability Limit	Per Claim	\$1,000,000
	Aggregate	\$2,000,000
Public Officials and Employment Practices Liability Deductible		\$0

Supplemental Payments: Pre-termination \$2,500 per employee - \$5,000 annual aggregate.
Non-Monetary \$100,000 aggregate.

Cyber Liability sublimit included under POL/EPLI

Media Content Services Liability
Network Security Liability
Privacy Liability
First Party Extortion Threat
First Party Crisis Management
First Party Business Interruption
Limit: \$100,000 each claim/annual aggregate



PREMIUM SUMMARY

Heritage Isle at Viera Community Development District
c/o Rizzetta & Company
3434 Colwell Ave, Suite 200
Tampa, FL 33614

Term: October 1, 2022 to October 1, 2023

Quote Number: 100122627

PREMIUM BREAKDOWN

Property (Including Scheduled Inland Marine)	\$5,137
Crime	Not Included
Automobile Liability	Not Included
Hired Non-Owned Auto	Included
Auto Physical Damage	Not Included
General Liability	\$3,341
Public Officials and Employment Practices Liability	\$3,038
Deadly Weapon Protection Coverage	Included
TOTAL PREMIUM DUE	\$11,516

IMPORTANT NOTE

Defense Cost - Outside of Limit, Does Not Erode the Limit for General Liability, Public Officials Liability, and Employment related Practices Liability.

Deductible does not apply to defense cost. Self-Insured Retention does apply to defense cost.

Additional Notes:

(None)




PARTICIPATION AGREEMENT

Application for Membership in the Florida Insurance Alliance

The undersigned local governmental entity, certifying itself to be a public agency of the State of Florida as defined in Section 163.01, Florida Statutes, hereby formally makes application with the Florida Insurance Alliance ("FIA") for continuing liability and/or casualty coverage through membership in FIA, to become effective 12:01 a.m., 10/01/2022, and if accepted by the FIA's duly authorized representative, does hereby agree as follows:

- (a) That, by this reference, the terms and provisions of the Interlocal Agreement creating the Florida Insurance Alliance are hereby adopted, approved and ratified by the undersigned local governmental entity. The undersigned local governmental entity certifies that it has received a copy of the aforementioned Interlocal Agreement and further agrees to be bound by the provisions and obligations of the Interlocal Agreement as provided therein;
- (b) To pay all premiums on or before the date the same shall become due and, in the event Applicant fails to do so, to pay any reasonable late penalties and charges arising therefrom, and all costs of collection thereof, including reasonable attorneys' fees;
- (c) To abide by the rules and regulations adopted by the Board of Directors;
- (d) That should either the Applicant or the Fund desire to cancel coverage; it will give not less than thirty (30) days prior written notice of cancellation;
- (e) That all information contained in the underwriting application provided to FIA as a condition precedent to participation in FIA is true, correct and accurate in all respects.

Heritage Isle at Viera Community Development District

(Name of Local Governmental Entity)
By:  E.J. WILLIAMS, JR
Signature Print Name
CHAIRMAN
Witness By: _____
Signature Print Name

IS HEREBY APPROVED FOR MEMBERSHIP IN THIS FUND, AND COVERAGE IS EFFECTIVE October 1, 2022

By: _____
Administrator



PROPERTY VALUATION AUTHORIZATION

Heritage Isle at Viera Community Development District
c/o Rizzetta & Company
3434 Colwell Ave, Suite 200
Tampa, FL 33614

QUOTATIONS TERMS & CONDITIONS

1. Please review the quote carefully for coverage terms, conditions, and limits.
2. The coverage is subject to 100% minimum earned premium as of the first day of the "Coverage Period".
3. Total premium is late if not paid in full within 30 days of inception, unless otherwise stated.
4. Property designated as being within Flood Zone A or V (and any prefixes or suffixes thereof) by the Federal Emergency Management Agency (FEMA), or within a 100 Year Flood Plain as designated by the United States Army Corps of Engineers, will have a Special Flood Deductible equal to all flood insurance available for such property under the National Flood Insurance Program, whether purchased or not or 5% of the Total Insured Value at each affected location whichever the greater.
5. The Florida Insurance Alliance is a shared limit. The limits purchased are a per occurrence limit and in the event an occurrence exhaust the limit purchased by the Alliance on behalf of the members, payment to you for a covered loss will be reduced pro-rata based on the amounts of covered loss by all members affected by the occurrence. Property designated as being within.
6. Coverage is not bound until confirmation is received from a representative of Egis Insurance & Risk Advisors.

I give my authorization to bind coverage for property through the Florida Insurance Alliance as per limits and terms listed below.

- ☒ Building and Content TIV
☐ Inland Marine
☐ Auto Physical Damage

\$940,225 As per schedule attached
Not Included
Not Included

Signature: *E. J. Williams, Jr.*
Name: *E. J. Williams, Jr.*
Title: *CHAIRMAN*

Date: *9/16/22*



Property Schedule

Schedule Items Effective As of: 10/01/2022

Heritage Isle at Viera Community Development District

Policy No.: 100122627

Agent: Egis Insurance Advisors LLC (Boca Raton, FL)

Unit #	Description Address		Year Built	Eff. Date	Building Value	Total Insured Value	
			Const Type	Term Date	Contents Value		
	Roof Shape	Roof Pitch		Roof Covering	Covering Replaced	Roof Yr Blt	
1	Entry Way, Sign, Fence		2005	10/01/2022	\$75,000		
	Wickham Rd & Legacy Blvd Viera FL 32940		Joisted masonry	10/01/2023			\$75,000
Unit #	Description Address		Year Built	Eff. Date	Building Value	Total Insured Value	
			Const Type	Term Date	Contents Value		
	Roof Shape	Roof Pitch		Roof Covering	Covering Replaced	Roof Yr Blt	
2	Pump Wells & Controllers, irrigation from pump		2005	10/01/2022	\$300,000		
	Wickham Rd & Legacy Blvd Viera FL 32940		Pump / lift station	10/01/2023			\$300,000
Unit #	Description Address		Year Built	Eff. Date	Building Value	Total Insured Value	
			Const Type	Term Date	Contents Value		
	Roof Shape	Roof Pitch		Roof Covering	Covering Replaced	Roof Yr Blt	
3	Bridge		2006	10/01/2022	\$20,000		
	Carambola Circle & Gurrero Dr. Viera FL 32940		Bridges	10/01/2023			\$20,000
Unit #	Description Address		Year Built	Eff. Date	Building Value	Total Insured Value	
			Const Type	Term Date	Contents Value		
	Roof Shape	Roof Pitch		Roof Covering	Covering Replaced	Roof Yr Blt	
4	Bridge		2006	10/01/2022	\$20,000		
	Camberly Circle & Galindo Dr. Viera FL 32940		Bridges	10/01/2023			\$20,000
Unit #	Description Address		Year Built	Eff. Date	Building Value	Total Insured Value	
			Const Type	Term Date	Contents Value		
	Roof Shape	Roof Pitch		Roof Covering	Covering Replaced	Roof Yr Blt	
5	Bridge		2006	10/01/2022	\$20,000		
	Carambola Circle & Funston Circle Viera FL 32940		Bridges	10/01/2023			\$20,000
Unit #	Description Address		Year Built	Eff. Date	Building Value	Total Insured Value	
			Const Type	Term Date	Contents Value		
	Roof Shape	Roof Pitch		Roof Covering	Covering Replaced	Roof Yr Blt	
6	Bridge		2006	10/01/2022	\$20,000		
	Funston Circle & Sansome Circle Viera FL 32940		Bridges	10/01/2023			\$20,000
Unit #	Description Address		Year Built	Eff. Date	Building Value	Total Insured Value	
			Const Type	Term Date	Contents Value		
	Roof Shape	Roof Pitch		Roof Covering	Covering Replaced	Roof Yr Blt	
7	Bridge		2006	10/01/2022	\$20,000		
	Quint Dr and Balboa Dr. Viera FL 32940		Bridges	10/01/2023			\$20,000

Sign:

Print Name:

E.J. Williams, Jr.

Date:

9/16/22



Property Schedule

Schedule Items Effective As of: 10/01/2022

Heritage Isle at Viera Community Development District

Policy No.: 100122627

Agent: Egis Insurance Advisors LLC (Boca Raton, FL)

Unit #	Description Address		Year Built	Eff. Date	Building Value	Total Insured Value	
			Const Type	Term Date	Contents Value		
	Roof Shape	Roof Pitch		Roof Covering		Covering Replaced	Roof Yr Blt
8	Community Monument Sign - Phase I - North Entrance		2004	10/01/2022	\$18,000	\$18,000	
	NE Corner of Legacy Blvd & Savoy Drive Viera FL 32940		Masonry non combustible	10/01/2023			
Unit #	Description Address		Year Built	Eff. Date	Building Value	Total Insured Value	
			Const Type	Term Date	Contents Value		
	Roof Shape	Roof Pitch		Roof Covering		Covering Replaced	Roof Yr Blt
9	Community Monument Sign - Phase I - South Entrance		2004	10/01/2022	\$18,000	\$18,000	
	NE Corner of Legacy Blvd & Camberly Circle Viera FL 32940		Masonry non combustible	10/01/2023			
Unit #	Description Address		Year Built	Eff. Date	Building Value	Total Insured Value	
			Const Type	Term Date	Contents Value		
	Roof Shape	Roof Pitch		Roof Covering		Covering Replaced	Roof Yr Blt
10	Community Monument Sign - Phase 2 - North Entrance		2004	10/01/2022	\$18,000	\$18,000	
	SW Corner of Legacy Blvd & Carambola Circle Viera FL 32940		Masonry non combustible	10/01/2023			
Unit #	Description Address		Year Built	Eff. Date	Building Value	Total Insured Value	
			Const Type	Term Date	Contents Value		
	Roof Shape	Roof Pitch		Roof Covering		Covering Replaced	Roof Yr Blt
11	Community Monument Sign - Phase 2 - South Entrance		2004	10/01/2022	\$18,000	\$18,000	
	SW Corner of Legacy Blvd & Carambola Circle Viera FL 32940		Masonry non combustible	10/01/2023			
Unit #	Description Address		Year Built	Eff. Date	Building Value	Total Insured Value	
			Const Type	Term Date	Contents Value		
	Roof Shape	Roof Pitch		Roof Covering		Covering Replaced	Roof Yr Blt
12	Community Monument Sign - Phase 3 - North Entrance		2004	10/01/2022	\$18,000	\$18,000	
	NE Corner of Legacy Blvd & Galindo Circle Viera FL 32940		Masonry non combustible	10/01/2023			
Unit #	Description Address		Year Built	Eff. Date	Building Value	Total Insured Value	
			Const Type	Term Date	Contents Value		
	Roof Shape	Roof Pitch		Roof Covering		Covering Replaced	Roof Yr Blt
13	Community Monument Sign - Phase 3 - South Entrance		2004	10/01/2022	\$18,000	\$18,000	
	NE Corner of Legacy Blvd & Galindo Circle Viera FL 32940		Masonry non combustible	10/01/2023			
Unit #	Description Address		Year Built	Eff. Date	Building Value	Total Insured Value	
			Const Type	Term Date	Contents Value		
	Roof Shape	Roof Pitch		Roof Covering		Covering Replaced	Roof Yr Blt
14	Community Monument Sign - Phase 4 - North Entrance		2004	10/01/2022	\$18,000	\$18,000	
	SW Corner of Legacy Blvd & Gurrero Drive Viera FL 32940		Masonry non combustible	10/01/2023			

Sign:

Print Name:

EJ WILLIAMS, JR

Date:

9/26/22



Property Schedule

Schedule Items Effective As of: 10/01/2022

Heritage Isle at Viera Community Development District

Policy No.: 100122627

Agent: Egis Insurance Advisors LLC (Boca Raton, FL)

Unit #	Description Address		Year Built	Eff. Date	Building Value		Total Insured Value	
			Const Type	Term Date	Contents Value			
	Roof Shape	Roof Pitch		Roof Covering	Covering Replaced	Roof Yr Blt		
15	Community Monument Sign - Phase 4 - South Entrance		2004	10/01/2022	\$18,000		\$18,000	
	SW Corner of Legacy Blvd & Bancroft Drive Viera FL 32940		Masonry non combustible	10/01/2023				
Unit #	Description Address		Year Built	Eff. Date	Building Value		Total Insured Value	
			Const Type	Term Date	Contents Value			
	Roof Shape	Roof Pitch		Roof Covering	Covering Replaced	Roof Yr Blt		
16	Community Monument Sign - Phase 5 - North Entrance		2006	10/01/2022	\$18,000		\$18,000	
	NE Corner of Legacy Blvd & Quint Drive Viera FL 32940		Masonry non combustible	10/01/2023				
Unit #	Description Address		Year Built	Eff. Date	Building Value		Total Insured Value	
			Const Type	Term Date	Contents Value			
	Roof Shape	Roof Pitch		Roof Covering	Covering Replaced	Roof Yr Blt		
17	Community Monument Sign - Phase 5 - South Entrance		2006	10/01/2022	\$18,000		\$18,000	
	NE Corner of Legacy Blvd & LeConte Street Viera FL 32940		Masonry non combustible	10/01/2023				
Unit #	Description Address		Year Built	Eff. Date	Building Value		Total Insured Value	
			Const Type	Term Date	Contents Value			
	Roof Shape	Roof Pitch		Roof Covering	Covering Replaced	Roof Yr Blt		
18	Community Monument Sign - Phase 6 - North Entrance		2006	10/01/2022	\$18,000		\$18,000	
	SW Corner of Legacy Blvd & Funston Circle Viera FL 32940		Masonry non combustible	10/01/2023				
Unit #	Description Address		Year Built	Eff. Date	Building Value		Total Insured Value	
			Const Type	Term Date	Contents Value			
	Roof Shape	Roof Pitch		Roof Covering	Covering Replaced	Roof Yr Blt		
19	Community Monument Sign - Phase 6 - South Entrance		2006	10/01/2022	\$18,000		\$18,000	
	SW Corner of Legacy Blvd & Funston Circle Viera FL 32940		Masonry non combustible	10/01/2023				
Unit #	Description Address		Year Built	Eff. Date	Building Value		Total Insured Value	
			Const Type	Term Date	Contents Value			
	Roof Shape	Roof Pitch		Roof Covering	Covering Replaced	Roof Yr Blt		
20	Community Monument Sign - Phase 7 - North Entrance		2006	10/01/2022	\$18,000		\$18,000	
	SW Corner of Legacy Blvd & Sansome Circle Viera FL 32940		Masonry non combustible	10/01/2023				
Unit #	Description Address		Year Built	Eff. Date	Building Value		Total Insured Value	
			Const Type	Term Date	Contents Value			
	Roof Shape	Roof Pitch		Roof Covering	Covering Replaced	Roof Yr Blt		
21	Community Monument Sign - Phase 7 - North Entrance		2006	10/01/2022	\$18,000		\$18,000	
	SW Corner of Legacy Blvd & Sansome Circle Viera FL 32940		Masonry non combustible	10/01/2023				

Sign:

Print Name:

E. J. Williams, Jr.

Date:

9/16/22



Property Schedule

Schedule Items Effective As of: 10/01/2022

Heritage Isle at Viera Community Development District

Policy No.: 100122627
Agent: Egis Insurance Advisors LLC (Boca Raton, FL)

Unit #	Description Address		Year Built	Eff. Date	Building Value		Total Insured Value	
	Roof Shape	Roof Pitch	Const Type	Term Date	Contents Value		Covering Replaced	Roof Yr Blt
				Roof Covering				
22	Community Monument Sign - Phase 8 - North Entrance		2006	10/01/2022	\$18,000		\$18,000	
	NE Corner of Legacy Blvd & Ingerson Drive Viera FL 32940		Masonry non combustible	10/01/2023				
Unit #	Description Address		Year Built	Eff. Date	Building Value		Total Insured Value	
	Roof Shape	Roof Pitch	Const Type	Term Date	Contents Value		Covering Replaced	Roof Yr Blt
				Roof Covering				
23	Community Monument Sign - Phase 8 - South Entrance		2006	10/01/2022	\$18,000		\$18,000	
	NE Corner of Legacy Blvd & Balboa Drive Viera FL 32940		Masonry non combustible	10/01/2023				
Unit #	Description Address		Year Built	Eff. Date	Building Value		Total Insured Value	
	Roof Shape	Roof Pitch	Const Type	Term Date	Contents Value		Covering Replaced	Roof Yr Blt
				Roof Covering				
24	Gazebo		2007	10/01/2022	\$15,000		\$15,000	
	N Wickham Rd & Lake Andrew Dr Viera FL 32940		Non combustible	10/01/2023				
Unit #	Description Address		Year Built	Eff. Date	Building Value		Total Insured Value	
	Roof Shape	Roof Pitch	Const Type	Term Date	Contents Value		Covering Replaced	Roof Yr Blt
				Roof Covering				
25	Street Lights (3) - N. Entrance - 3 Double Light P		2012	10/01/2022	\$16,800		\$16,800	
	Legacy Blvd & Judge Fran Jamieson Way Viera FL 32940		Electrical equipment	10/01/2023				
Unit #	Description Address		Year Built	Eff. Date	Building Value		Total Insured Value	
	Roof Shape	Roof Pitch	Const Type	Term Date	Contents Value		Covering Replaced	Roof Yr Blt
				Roof Covering				
26	Street Lights (2) - S. Entrance - 2 Single Light P		2012	10/01/2022	\$10,200		\$10,200	
	Legacy Blvd & Wickham Rd Viera FL 32940		Electrical equipment	10/01/2023				
Unit #	Description Address		Year Built	Eff. Date	Building Value		Total Insured Value	
	Roof Shape	Roof Pitch	Const Type	Term Date	Contents Value		Covering Replaced	Roof Yr Blt
				Roof Covering				
27	Irrigation Equipment in Clubhouse		1996	10/01/2022			\$8,225	
	6800 Legacy Blvd Viera FL 32940		Pump / lift station	10/01/2023	\$8,225			
Unit #	Description Address		Year Built	Eff. Date	Building Value		Total Insured Value	
	Roof Shape	Roof Pitch	Const Type	Term Date	Contents Value		Covering Replaced	Roof Yr Blt
				Roof Covering				
28	Irrigation Clock in clubhouse		1996	10/01/2022			\$6,000	
	6800 Legacy Blvd Viera FL 32940		Pump / lift station	10/01/2023	\$6,000			

Sign:

Print Name:

EJWILLIAMS, JR

Date:

9/16/22



Property Schedule

Schedule Items Effective As of: 10/01/2022

Heritage Isle at Viera Community Development District

Policy No.: 100122627

Agent: Egis Insurance Advisors LLC (Boca Raton, FL)

Unit #	Description Address		Year Built	Eff. Date	Building Value	Total Insured Value	
			Const Type	Term Date	Contents Value		
	Roof Shape	Roof Pitch		Roof Covering		Covering Replaced	Roof Yr Blt
29	Irrigation Clock - behind Clubhouse		1996	10/01/2022	\$6,000		
	6800 Legacy Blvd Viera FL 32940		Electrical equipment	10/01/2023		\$6,000	
Unit #	Description Address		Year Built	Eff. Date	Building Value	Total Insured Value	
			Const Type	Term Date	Contents Value		
	Roof Shape	Roof Pitch		Roof Covering		Covering Replaced	Roof Yr Blt
30	Irrigation Clocks (2) @ \$6,000 each - in Park		1996	10/01/2022	\$12,000		
	Quint Drive & Pacheco Lane Viera FL 32940		Electrical equipment	10/01/2023		\$12,000	
Unit #	Description Address		Year Built	Eff. Date	Building Value	Total Insured Value	
			Const Type	Term Date	Contents Value		
	Roof Shape	Roof Pitch		Roof Covering		Covering Replaced	Roof Yr Blt
31	Irrigation Clocks (2) @ \$6,000 each		1996	10/01/2022	\$12,000		
	Funston Circle Viera FL 32940		Electrical equipment	10/01/2023		\$12,000	
Unit #	Description Address		Year Built	Eff. Date	Building Value	Total Insured Value	
			Const Type	Term Date	Contents Value		
	Roof Shape	Roof Pitch		Roof Covering		Covering Replaced	Roof Yr Blt
32	Irrigation Clocks (2) @ \$6,000 each		1996	10/01/2022	\$12,000		
	Off Legacy Blvd Viera FL 32940		Electrical equipment	10/01/2023		\$12,000	
Unit #	Description Address		Year Built	Eff. Date	Building Value	Total Insured Value	
			Const Type	Term Date	Contents Value		
	Roof Shape	Roof Pitch		Roof Covering		Covering Replaced	Roof Yr Blt
33	Irrigation Clocks (2) @ \$6,000 each - in Park		1996	10/01/2022	\$12,000		
	Carambola Circle Viera FL 32940		Electrical equipment	10/01/2023		\$12,000	
Unit #	Description Address		Year Built	Eff. Date	Building Value	Total Insured Value	
			Const Type	Term Date	Contents Value		
	Roof Shape	Roof Pitch		Roof Covering		Covering Replaced	Roof Yr Blt
34	Irrigation Clocks (2) @ \$6,000 each - in Park		1996	10/01/2022	\$12,000		
	Guerrero Drive & Bancroft Drive Viera FL 32940		Electrical equipment	10/01/2023		\$12,000	
Unit #	Description Address		Year Built	Eff. Date	Building Value	Total Insured Value	
			Const Type	Term Date	Contents Value		
	Roof Shape	Roof Pitch		Roof Covering		Covering Replaced	Roof Yr Blt
35	Irrigation Clocks (2) @ \$6,000 each - in Park		1996	10/01/2022	\$12,000		
	Galindo Circle Viera FL 32940		Electrical equipment	10/01/2023		\$12,000	

Sign:

Print Name:

EJ Williams Jr

Date:

9/16/22



Property Schedule

Schedule Items Effective As of: 10/01/2022

Heritage Isle at Viera Community Development District

Policy No.: 100122627

Agent: Egis Insurance Advisors LLC (Boca Raton, FL)

Unit #	Description Address		Year Built	Eff. Date	Building Value	Total Insured Value	
			Const Type	Term Date	Contents Value		
	Roof Shape	Roof Pitch			Roof Covering	Covering Replaced	Roof Yr Blt
36	Irrigation Clocks (2) @ \$6,000 each		1996	10/01/2022	\$12,000	\$12,000	
	Camberly Circle & Grayson Drive Viera FL 32940		Electrical equipment	10/01/2023			
Unit #	Description Address		Year Built	Eff. Date	Building Value	Total Insured Value	
			Const Type	Term Date	Contents Value		
	Roof Shape	Roof Pitch			Roof Covering	Covering Replaced	Roof Yr Blt
37	Benchs (2) @ \$600 each		2006	10/01/2022	\$1,200	\$1,200	
	In Park off Guerro Dr & Bancroft Dr Viera FL 32940		Non combustible	10/01/2023			
Unit #	Description Address		Year Built	Eff. Date	Building Value	Total Insured Value	
			Const Type	Term Date	Contents Value		
	Roof Shape	Roof Pitch			Roof Covering	Covering Replaced	Roof Yr Blt
38	Benchs (2) @ \$600 each		2006	10/01/2022	\$1,200	\$1,200	
	In park off Galindo Cir Viera FL 32940		Non combustible	10/01/2023			
Unit #	Description Address		Year Built	Eff. Date	Building Value	Total Insured Value	
			Const Type	Term Date	Contents Value		
	Roof Shape	Roof Pitch			Roof Covering	Covering Replaced	Roof Yr Blt
39	Benchs (2) @ \$600 each		2006	10/01/2022	\$1,200	\$1,200	
	In Park off Carambola Circle Viera FL 32940		Non combustible	10/01/2023			
Unit #	Description Address		Year Built	Eff. Date	Building Value	Total Insured Value	
			Const Type	Term Date	Contents Value		
	Roof Shape	Roof Pitch			Roof Covering	Covering Replaced	Roof Yr Blt
40	Benchs (2) @ \$600 each		2006	10/01/2022	\$1,200	\$1,200	
	In Park off Funston Circle Viera FL 32940		Non combustible	10/01/2023			
Unit #	Description Address		Year Built	Eff. Date	Building Value	Total Insured Value	
			Const Type	Term Date	Contents Value		
	Roof Shape	Roof Pitch			Roof Covering	Covering Replaced	Roof Yr Blt
41	Benchs (2) @ \$600 each		2006	10/01/2022	\$1,200	\$1,200	
	In Park off Quin Dr & Pacheco Lane Viera FL 32940		Non combustible	10/01/2023			
Unit #	Description Address		Year Built	Eff. Date	Building Value	Total Insured Value	
			Const Type	Term Date	Contents Value		
	Roof Shape	Roof Pitch			Roof Covering	Covering Replaced	Roof Yr Blt
42	Entry Monument Sign		2014	10/01/2022	\$25,000	\$25,000	
	Legacy Blvd & Judge Fran Jamieson Way Viera FL 32940		Masonry non combustible	10/01/2023			
			Total:	Building Value \$926,000	Contents Value \$14,225	Insured Value \$940,225	

Sign:

Print Name:

E.J. Williams, Jr.

Date:

9/16/22



INVOICE

Customer	Heritage Isle at Viera Community Development District
Acct #	853
Date	09/01/2022
Customer Service	Kristina Rudez
Page	1 of 1

Heritage Isle at Viera Community Development District
c/o Rizzetta & Company
3434 Colwell Ave, Suite 200
Tampa, FL 33614

Payment Information	
Invoice Summary	\$ 11,516.00
Payment Amount	
Payment for:	Invoice#16577
100122627	

Thank You

Please detach and return with payment



Customer: Heritage Isle at Viera Community Development District

Invoice	Effective	Transaction	Description	Amount
16577	10/01/2022	Renew policy	Policy #100122627 10/01/2022-10/01/2023 Florida Insurance Alliance Package - Renew policy Due Date: 9/1/2022	11,516.00
				Total
				\$ 11,516.00

[Handwritten Signature]
 Kristina Rudez
 HICDD 9/16/22

Thank You

FOR PAYMENTS SENT OVERNIGHT:
Bank of America Lockbox Services, Lockbox 748555, 6000 Feldwood Rd. College Park, GA 30349

Remit Payment To: Egis Insurance Advisors	(321)233-9939	Date
P.O. Box 748555	sclimer@egisadvisors.com	09/01/2022
Atlanta, GA 30374-8555		

TAB 7

Addendum

Addendum A to Campus Suite Contract:

Contract effective date: 1/1/2022

Statement of Work

2. Maintenance and Management of the Website.

2. Remediate in an ADA compliant format new documents uploaded by the District Manager to the document portal;*

*If certain PDFs are not able to be fully remediated, Contractor shall work with the District to create a summary of the content in the PDF and provide contact information if anyone needs reasonable accommodations to access the full content within that PDF.

Website Creation and Management Agreement

B. Maintenance.

ii. remediate new documents on an unlimited basis; for any agenda packages, Contractor shall turn around the remediated version within two (2) business days; any updates or fixes needed to the agenda requiring remediation shall be remediated within 48 hours of the District Manager's submission for such request.

Section 3. Compensation.

B. Maintenance. For performance of the Services as provided in Section 2(B) of this Agreement, starting October 1, 2019 the District shall pay Contractor (\$1,515.00) per year, payable in one annual installment for Ongoing PDF Accessibility Compliance Service and Website Services. Parties understands and acknowledges that this includes (i) the annual fee for the domain name for the District's Website, which Contractor shall pay, at its sole expense, on behalf of the District; and (ii) document remediation pursuant to Section 2(B)(iii).

PROVIDER: Innersync Studio, Ltd.

By: _____ Date: _____

Authorized Representative

Innersync Studio, LLC

USER: Heritage Isle at Viera Community Development District

By: _____ Date: _____

Print name: _____

STAFF REPORTS

District Counsel

District Engineer

District Manager

**Audience Comments
And
Supervisor Requests**

ADJOURNMENT