

Lakeside Preserve Community Development District

3501 Quadrangle Boulevard, Suite 270, Orlando, FL 32817; 407-723-5900

www.lakesidepreservecdd.org

The following is the proposed agenda for the Board of Supervisors' meeting of the Lakeside Preserve Community Development District, scheduled to be held **Wednesday, October 21, 2026, at 11:30 a.m. at the Heritage Baptist Church, 4202 Pipkin Creek Rd, Lakeland, FL 33811.** Questions or comments on the Board Meeting or proposed agenda may be addressed to Jane Gaarlandt at gaarlandtj@pfm.com or (407) 723-5900.

To attend the meeting, please use the below conference call information:

Phone: **1-844-621-3956**

Access Code: **2533 704 7775**

PROPOSED BOARD OF SUPERVISORS' MEETING AGENDA

Administrative Matters

- Roll Call to Confirm Quorum
- Public Comment Period *[for any members of the public desiring to speak on any proposition before the Board]*
- 1. **Consideration of Minutes of the August 19, 2026, Board of Supervisors' Meeting**

Business Matters

- 2. **Consideration of Resolution 2027-01, Adopting a Policy for the Stormwater Management System**
- 3. **Discussion of Wildlife Signage**
- 4. **Ratification of FY 2027 General Insurance and Worker's Compensation Proposals**
- 5. **Ratification of Prince & Sons Proposal to Flush Cut and Disposal of Oak Tree**
- 6. **Ratification of Additional Service Order with Prince & Sons for Irrigation Repairs**
- 7. **Ratification of Requisition Nos. 153 – 159 Paid Through Developer Funds**
- 8. **Review of Monthly Financials**

Other Business

- 9. **Staff Reports**
 - **District Counsel**
 - **District Engineer**
 - **District Manager**
 - **Next meeting: November 18, 2026**
 - **Field Service Report**
- 10. **Supervisor Requests and Audience Comments**

Adjournment



LAKESIDE PRESERVE COMMUNITY DEVELOPMENT DISTRICT

**Consideration of Minutes of
the August 19, 2026,
Board of Supervisors' Meeting**

MINUTES OF MEETING

LAKESIDE PRESERVE COMMUNITY DEVELOPMENT DISTRICT BOARD OF SUPERVISORS' MEETING

Wednesday, August 19, 2026, at 11:30 a.m.

Heritage Baptist Church

4202 Pipkin Creek Rd.

Lakeland, Florida 33811

Board Members present at roll call:

Lee Saunders
Brian Walsh
Darrel Rusnell
Jon Ahlschwede

Vice Chairman
Assistant Secretary
Assistant Secretary
Assistant Secretary

Also Present:

Jane Gaarlandt
Kwame Jackson
Ashley Quiros
Verona Griffith
Savannah Hancock
Yaima Rodriguez Morales

PFM Management Services LLC
PFM Management Services LLC
PFM Management Services LLC (via phone)
PFM Management Services LLC (via phone)
KVV Law
TRIAD

FIRST ORDER OF BUSINESS

Roll Call to Confirm Quorum

Mr. Jackson called the meeting to order at 11:30 a.m. and roll call was taken.

SECOND ORDER OF BUSINESS

Public Comment Period

There were no members of the public present.

THIRD ORDER OF BUSINESS

Consideration of Minutes of the May 20, 2026, Board of Supervisors' Meeting

The Board reviewed the minutes.

On MOTION by Mr. Walsh, seconded by Mr. Ahlschwede, with all in favor, the Board of Supervisors for the Lakeside Preserve Community Development District approved the Minutes of the May 20, 2026, Board of Supervisors' Meeting.

FOURTH ORDER OF BUSINESS

Consideration of Resolution 2026-07, Setting the Regular Meeting Schedule for Fiscal Year 2026-2027

Mr. Jackson reviewed the meeting schedule and noted the Board meetings would be at 11:30 a.m. at The Heritage Baptist Church, 4202 Pipkin Creek Rd, Lakeland, FL 33811.

On MOTION by Mr. Ahlschwede, seconded by Mr. Walsh, with all in favor, the Board of Supervisors for the Lakeside Preserve Community Development District approved Resolution 2026-07, Setting the Regular Meeting Schedule for Fiscal Year 2026-2027.

FIFTH ORDER OF BUSINESS

Consideration of Performance Measures/Standards & Annual Reporting Form for Fiscal Year 2026-2027

Mr. Jackson noted that approximately two years ago this became an annual statutory requirement. He noted that the goals are items that the District already does.

On MOTION by Mr. Rusnell, seconded by Mr. Saunders, with all in favor, the Board of Supervisors for the Lakeside Preserve Community Development District approved Performance Measures/Standards & Annual Reporting Form for Fiscal Year 2026-2027.

SIXTH ORDER OF BUSINESS

Public Hearing on the Adoption of the District's Fiscal Year 2026-2027 Budget

- **Public Comments and Testimony**
- **Board Comments**
- **Consideration of Resolution 2026-08, Adopting a Fiscal Year 2026-2027 Budget and Appropriating Funds**
- **Consideration of Resolution 2026-09, Adopting an Assessment Roll for Fiscal Year 2026-2027 and Certifying Special Assessments for Collection**

Mr. Jackson requested a motion to open the public hearing.

On MOTION by Mr. Walsh, seconded by Mr. Ahlschwede, with all in favor, the Board of Supervisors for the Lakeside Preserve Community Development District opened the public hearing.

A resident questioned the reason for the budget increases and questioned the amenities.

Mr. Jackson advised the HOA is in charge of the amenities. The resident commented on the increases for District Counsel and District Management expenses.

A resident noted an exhibit A of the management agreement is missing.

It was noted that it is a publicly available document, and a public record request can be made to obtain the exhibit.

A resident questioned when the transition for the general election happens.

A resident asked how the community knows there is an open seat.

Mr. Jackson, Ms. Gaarlandt and District Counsel addressed the questions.

Mr. Jackson requested a motion to close the public hearing.

On MOTION by Mr. Saunders, seconded by Mr. Ahlschwede, with all in favor, the Board of Supervisors for the Lakeside Preserve Community Development District closed the public hearing.

Mr. Walsh asked for the current assessment amount and the new assessment amount for O&M.

Mr. Jackson asked Ms. Griffith to confirm if there have been any changes to the budget and assessment schedule.

Ms. Griffith confirmed there have been no changes made since the preliminary budget was approved.

On MOTION by Mr. Walsh, seconded by Mr. Ahlschwede, with all in favor, the Board of Supervisors for the Lakeside Preserve Community Development District approved Resolution 2026-08, Adopting a Fiscal Year 2026-2027 Budget and Appropriating Funds

Mr. Jackson requested a motion to adopt Resolution 2026-09.

On MOTION by Mr. Rusnell, seconded by Mr. Walsh, with all in favor, the Board of Supervisors for the Lakeside Preserve Community Development District approved Resolution 2026-09, Adopting an Assessment Roll for Fiscal Year 2026-2027 and Certifying Special Assessments for Collection.

SEVENTH ORDER OF BUSINESS

Consideration of Resolution 2026-10, Declaring Vacancies on the Board for Seat 1 & Seat 2

Mr. Jackson noted that no candidates registered for qualification during the qualification period. The seats will become holdover seats on November 17, 2026.

On MOTION by Mr. Ahlschwede, seconded by Mr. Rusnell, with all in favor, the Board of Supervisors for the Lakeside Preserve Community Development District approved Resolution 2026-10, Declaring Vacancies on the Board for Seat 1 & Seat 2.

EIGHTH ORDER OF BUSINESS**Consideration of Prince & Sons 2026
Hurricane & Storm Response Pricing**

Mr. Jackson noted that if the Board approves, the pricing would be locked in should there be any major storms.

Ms. Hancock noted that this guarantees priority response.

On MOTION by Mr. Rusnell, seconded by Mr. Ahlschwede, with all in favor, the Board of Supervisors for the Lakeside Preserve Community Development District accepted Prince and Sons 2026 Hurricane & Storm Response Pricing, not to exceed \$4,000.

NINTH ORDER OF BUSINESS**Consideration of Fiscal Year 2026
Auditor Engagement Letter**

Mr. Jackson noted that this has been reviewed by District Counsel

On MOTION by Mr. Rusnell seconded by Mr. Saunders, with all in favor, the Board of Supervisors for the Lakeside Preserve Community Development District accepted Fiscal Year 2026 Auditor Engagement Letter.

TENTH ORDER OF BUSINESS**Review and Acceptance of the Fiscal
Year 2025 Audit Report**

Mr. Jackson noted that this was a clean audit and was reviewed by District staff.

On MOTION by Mr. Ahlschwede, seconded by Mr. Walsh, with all in favor, the Board of Supervisors for the Lakeside Preserve Community Development District accepted Fiscal Year 2025 Audit Report.

ELEVENTH ORDER OF BUSINESS**Ratification of District Management
Fee Increase Letter**

Mr. Jackson noted that the increase was proposed to the board and adopted previously and is for ratification.

On MOTION by Mr. Ahlschwede, seconded by Mr. Walsh, with all in favor, the Board of Supervisors for the Lakeside Preserve Community Development District ratified District Management Fee Increase Letter.

THIRTEENTH ORDER OF BUSINESS

Ratification of First Amendment to the Amended & Restate Landscape & Irrigation Maintenance Services with Price & Sons

Mr. Jackson noted that this was previously approved by the Board and is for ratification.

On MOTION by Mr. Saunders, seconded by Mr. Rusnell, with all in favor, the Board of Supervisors for the Lakeside Preserve Community Development District ratified First Amendment to the Amended & Restated Landscape & Irrigation Maintenance Services with Prince & Sons.

FORTEENTH ORDER OF BUSINESS

Ratification of Amended and Restate Agreement for Landscape & Irrigation Maintenance Services Additional Service Order for Tree Staking

Mr. Jackson noted that this had been previously approved and is for ratification .

On MOTION by Mr. Saunders, seconded by Mr. Walsh, with all in favor, the Board of Supervisors for the Lakeside Preserve Community Development District ratified Amended and Restate Agreement for Landscape & Irrigation Maintenance Services Additional Service Order for Tree Staking.

FIFTEENTH ORDER OF BUSINESS

Ratification of Fuel Surcharge Addendum to Agreement for Landscaping Maintenance Services with Prince and Sons

Mr. Jackson noted that this had been previously before the Board and District Staff was charged with negotiating a better amount. That negotiated amount was approved by the Chair and is for ratification.

On MOTION by Mr. Walsh, seconded by Mr. Saunders, with all in favor, the Board of Supervisors for the Lakeside Preserve Community Development District ratified Fuel Surcharge Addendum to Agreement for Landscaping Maintenance Services with Prince and Sons.

SIXTEENTH ORDER OF BUSINESS

Ratification of Prince & Sons Proposal for Dead Tree Flush Cut and Removal

Mr. Jackson noted that this is for the dead trees behind the property located on River Birch Bend that has stalled construction from moving forward.

On MOTION by Mr. Walsh, seconded by Mr. Saunders, with all in favor, the Board of Supervisors for the Lakeside Preserve Community Development District ratified Prince & Sons Proposal for Dead Tree Flush Cut and Removal.

SEVENTEENTH ORDER OF BUSINESS

Ratification of Payment Authorization Nos. 250 – 255.

Mr. Jackson noted that these are standard district expenses.

On MOTION by Mr. Ahlschwede, seconded by Mr. Walsh, with all in favor, the Board of Supervisors for the Lakeside Preserve Community Development District ratified Payment Authorization Nos. 250 - 255.

EIGHTEENTH ORDER OF BUSINESS

Ratification of Requisition Nos. 141 – 152 Paid Through Developer Funds

Mr. Jackson noted that these have been previously approved and payments disbursed, and are for ratification .

On MOTION by Mr. Walsh, seconded by Mr. Saunders, with all in favor, the Board of Supervisors for the Lakeside Preserve Community Development District Ratified Requisition Nos. 141 – 152 Paid Through Developer Funds.

NINETEENH ORDER OF BUSINESS

Review of Monthly Financials

The Board reviewed the monthly financials through July 31, 2026. It was noted that just over ¾ the budget has been spent.

No action was required by the Board.

TWENTIETH ORDER OF BUSINESS

Staff Reports

District Counsel – Ms. Hancock reminded the Board to complete their ethics training.

District Engineer – Not present.

District Manager – Ms. Jackson reminded the Board that the next meeting is scheduled for September 16, 2026. Meetings will be adjusted if needed.

Mr. Jackson mentioned an inspection report completed by the insurance carrier. There were recommendations regarding wildlife signage.

Mr. Jackson gave a brief overview of the process for alligator removal.

Ms. Hancock noted that if insurance suggests signage, then signage should be implemented.

Mr. Jackson will speak with the insurance carrier and get proposals.

Ms. Hancock suggested creating a stormwater management policy.

Mr. Jackson reviewed the field service report with the board.

Ms. Gaarlandt noted that if anyone wants backup material after the meeting, to reach out and it will be provided.

Ms. Gaarlandt announced Mr. Jackson as the official District Manager for the District.

TWENTY-FIRST ORDER OF BUSINESS

Supervisor Requests and Audience Comments

Mr. Ahlschwede commented on the trash and debris in the new section.

Mr. Ahlschwede and another member commented on the nails and their need to replace tires.

Mr. Ahlschwede commented on a leaning young tree.

Mr. Jackson noted that they are aware of several trees and the district is waiting for a response from the developer to ensure who is responsible.

A resident commented on the trees behind his house.

TWENTY-SECOND ORDER OF BUSINESS

Adjournment

There was no further business to discuss.

On MOTION by Mr. Walsh, seconded by Mr. Saunders, with all in favor, the August 19, 2026, Meeting of the Board of Supervisors for the Lakeside Preserve Community Development District was adjourned.

Secretary/Assistant Secretary

Chairman/Vice Chairman



LAKESIDE PRESERVE COMMUNITY DEVELOPMENT DISTRICT

**Consideration of Resolution 2027-01, Adopting a
Policy for the Stormwater Management System**

RESOLUTION 2027-01

**A RESOLUTION OF THE BOARD OF SUPERVISORS OF
LAKESIDE PRESERVE COMMUNITY DEVELOPMENT
DISTRICT ADOPTING A POLICY RELATING TO THE
STORMWATER MANAGEMENT SYSTEM; PROVIDING A
SEVERABILITY CLAUSE; AND PROVIDING AN EFFECTIVE
DATE.**

WHEREAS, Lakeside Preserve Community Development District (the “**District**”) is a local unit of special-purpose government created and existing pursuant to Chapter 190, *Florida Statutes*, as amended (“**Act**”), and being situated in the City of Lakeland, Florida; and

WHEREAS, the Act authorizes the District to adopt policies and procedures to govern the administration of the District and to adopt resolutions as may be necessary for the conduct of District business; and

WHEREAS, to provide for efficient and effective District operations and to maintain compliance with Florida law, the Board of Supervisors finds that it is in the best interests of the District to adopt by resolution the *Stormwater Management System Policy* (“**Policy**”), attached here as **Exhibit A**, for immediate use and application; and

WHEREAS, the Board has complied with applicable Florida law concerning adoption of the Policy.

**NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF
SUPERVISORS OF LAKESIDE PRESERVE COMMUNITY
DEVELOPMENT DISTRICT:**

SECTION 1. The Policy is hereby adopted pursuant to this Resolution as necessary for the efficient operations of the District’s stormwater management system. The Policy shall remain in full force and effect until such time as the Board of Supervisors amends or repeals the Policy in accordance with the Act.

SECTION 2. If any provision of this Resolution is held to be illegal or invalid, the other provisions shall remain in full force and effect.

SECTION 3. This Resolution shall become effective upon its passage and shall remain in effect unless rescinded or repealed.

PASSED AND ADOPTED this 21st day of October 2026.

ATTEST:

**LAKESIDE PRESERVE COMMUNITY
DEVELOPMENT DISTRICT**

Secretary/Assistant Secretary

Chairperson, Board of Supervisors

Exhibit A: *Stormwater Management System Policy*

Exhibit A

STORMWATER MANAGEMENT SYSTEM POLICY

This Stormwater Management System Policy (the “Policy”) is intended to govern the use of the stormwater management system, including but not limited to, ponds, lakes, or other drainage features located within the Lakeside Preserve Community Development District. The lakes and ponds that comprise the District’s stormwater management system (the “System”) primarily function as retention ponds to help facilitate the District’s stormwater management system for runoff and overflow in accordance with requirements of the Southwest Florida Water Management District. As a result, contaminants may be present within the stormwater management system. This Policy is intended to limit the System’s contact with such contaminants, ensure continued operations of the System, and prevent inappropriate use of the System.

- (1) The recreational use of watercraft, including but not limited to boats, canoes, and kayaks in the District’s System is strictly prohibited. Wading, swimming, and fishing in District’s System is strictly prohibited.
- (2) District vendors may, when approved by the District, utilize watercraft to complete maintenance activities that are necessary for the upkeep of the System under the permits issued by the Southwest Florida Water Management District.
- (3) Pets are not allowed in the District’s System.
- (4) No pipes, pumps or other devices used for irrigation, or the withdrawal of water shall be placed in or around the District’s System, except as permitted by the permits issued by the Southwest Florida Water Management System or by District vendors if expressly authorized by the District.
- (5) No foreign materials may be disposed of in the District’s System, including, but not limited to tree branches, paint, cement, oils, soap suds, building materials, chemicals, fertilizers, landscaping debris, wastewater, pool water or any other material that is not naturally occurring or which may be detrimental to the System and surrounding environment.
- (6) Easements through residential property along the District’s System are for maintenance purposes only and are not general grants for access for fishing or any other recreational purpose. Access to residents’ backyards via these maintenance easements is prohibited, except for use by District staff and District vendors for use of the easement for its legal purpose. Unless individual property owners explicitly grant permission for others to access their backyards, entering their private property can be considered trespassing. Please be considerate of the privacy rights of other residents.
- (7) The Florida Fish and Wildlife Commission (“FWC”) regulates the capture and harvest of alligators in Florida. **The FWC defines “nuisance” alligators as those over four (4) feet in length that pose a threat to people, pets or property, with special consideration given to the proximity of children and pedestrian traffic.** An aggressive alligator of any length will be deemed a nuisance.

The Statewide Nuisance Alligator Program (“SNAP”) exists to address complaints regarding alligators. If you see an alligator on your property that meets the criteria above, you can call at the Nuisance Alligator Hotline at 866-FWC-GATOR (866-392-4286). If the complaint meets criteria, the FWC will send out a permitted nuisance alligator trapper to capture and destroy the alligator, often in less than a few hours. The trapper must confirm legal right/permission to access property to capture an alligator. Additionally, the trapper may capture any alligators in the area over 4 feet

to ensure likelihood of obtaining the complained of alligator (i.e., “unlimited response”). Alligators are euthanized and not relocated.

If you see an alligator on District property (ex. on the pond banks, in a pond) that meets the criteria above, please contact the District Manager’s office. If appropriate, the District Manager, Vice Chairman, or Chairman of the Board of Supervisors shall contact the FWC to report a nuisance alligator found on District property.

For more information regarding the SNAP program, please visit:
<https://myfwc.com/wildlifehabitats/wildlife/alligator/snap/>

- (8) Any hazardous conditions concerning the District’s System must immediately be reported to the District Manager and the proper authorities.
- (9) Violation of this Policy shall result in the appropriate law enforcement agency being notified to take appropriate action.



LAKESIDE PRESERVE COMMUNITY DEVELOPMENT DISTRICT

Discussion of Wildlife Signage



FLORIDA INSURANCE ALLIANCE



Lakeside Preserve Community Development District

Date of Visit: Tuesday ,May 12, 2026, at 12:00 PM

District Manager: Kwame Jackson jacksonk@pfm.com

Address: 4249 Cattail Marsh Dr, Lakeland, FL 33811

FIA Attendees: Dennis Thomas, FIA Risk Services Consultant

Visit Overview

The purpose of the visit conducted on Tuesday, May 12th, at 12:00 PM was to allow our team to review the Lakeside Preserve Community Development District from a risk-management perspective.

The visit provided an opportunity for us to support the District's ongoing loss-control efforts by identifying conditions that may contribute to accidents or claims and by discussing recommendations to help address potential loss-producing hazards. The observations and recommendations resulting from this review are included in this letter.

District Summary

Lakeside Preserve in Lakeland, Florida is a 389.39-acre master-planned community located in Polk County, positioned off Pipkin Creek Road, just south of Drane Field Road and near the Polk Parkway, providing convenient access to Lakeland, Winter Haven, Tampa, and surrounding areas. The community features a gated entrance, peaceful nature views, and a landscape defined by ponds, open space, and wetlands that contribute to its park-like setting.

Ownership & Maintenance Responsibilities

The District owns and maintains the full stormwater management system, including the network of interconnected retention lakes, outfall structures, drainage pipes, and the surrounding maintenance easements that ensure proper water quality and flood control throughout the property. These lakes form a central visual and environmental feature of the community, and the District is responsible for their upkeep, shoreline stabilization, aquatic vegetation management, and long-term structural integrity.

In addition to stormwater assets, the District owns the primary landscaped entry features, including monument signage, irrigation systems, perimeter buffers, and the extensive internal landscaping that frames the roadways and common areas. The District also maintains designated open-space tracts and preserved natural areas that protect wetlands and wildlife habitat while contributing to the community's overall aesthetic and environmental character. These preserved areas include wooded buffers, conservation tracts, and passive green spaces that provide visual separation between neighborhoods and support the natural drainage patterns of the site.

Although a pool, cabana, playground, and mailbox areas are located within the District's boundaries, these amenities are owned and managed by the HOA, not the District. The District's responsibilities remain focused on the stormwater system, common-area landscaping, conservation lands, and other infrastructure specifically conveyed to it for long-term stewardship.

Strengths

Strengths highlight some of the existing risk mitigation strategies in place. Consistent application is important to the District's overall risk management program.

- District overall is very well maintained.

Critical Recommendations

Critical recommendations are associated with exposures and hazards that represent a significant danger or risk warranting immediate attention. While follow-up for all recommendations is encouraged, items in the critical category may require documented resolution and review by FIA's Risk Services team as indicated in the recommendation description.

- None at this time

Important Recommendations

Important recommendations are provided to address exposures that if not corrected, have the potential to result in moderate injury or property/liability losses. Some of these recommendations have been proposed from prior visits.

- Wildlife Signage
- Pond Wildlife Signage

Wildlife Signage- The presence of dense vegetation and natural wildlife activity near the walkway increases the likelihood of unexpected encounters with animals such as snakes, raccoons, or insects, which can cause injuries or fear-based incidents.	Recommendation- Because the sidewalk runs directly alongside the District-owned wooded habitat, installing a clearly visible warning sign is the most practical and effective way to address the natural risks in this area. The sign should inform pedestrians about the presence of wildlife, uneven natural terrain, and other environmental conditions they may encounter near the conservation area. Please see attached Published Resource on Wildlife Safety & Risk Management Strategies.
	

Pond Wildlife Signage- A walkway or sidewalk running directly beside a pond creates several wildlife-related risks that a District must account for, because ponds naturally attract animals that may come into close contact with pedestrians. Ponds in Florida commonly draw snakes, turtles, frogs, wading birds, and in some cases alligators, all of which may cross or linger near the walkway. This increases the likelihood of unexpected encounters that can startle pedestrians or lead to bites, stings, or defensive behavior from wildlife.

Recommendation- Consider adding signage to ponds that are adjacent to areas with high pedestrian traffic including sidewalks and trails. Signage should prohibit swimming, boating, fishing (if district policy) and warn of wildlife in the area such as alligators and snakes. Please see attached Published Resource on Wildlife Safety & Risk Management Strategies.



Advisory Recommendations

Advisory Recommendation is a suggestion meant to provide information to make an informed decision and is generally not mandatory.

- None at this time

Thank you for including us in your risk management efforts. We appreciate your collaborative approach and are committed to working together to develop and implement effective risk mitigation strategies.



**FLORIDA
INSURANCE
ALLIANCE**

Living in Harmony: **Wildlife Safety Tips & Signage Strategies for Districts**



Florida's abundant wildlife is a treasure, but it also presents unique challenges for special districts, especially CDDs. As districts manage and maintain common areas, including parks, trails, and ponds, ensuring the safety of residents and visitors amidst wildlife encounters is paramount. While striking a balance between preserving natural beauty and mitigating risks can be complex, proactive measures like wildlife warning signage play a crucial role.

Recent Incidents Highlight the Need for Vigilance:

- **Tragic Toll:** In July 2023, an 85-year-old woman was tragically killed by an alligator while walking near her community pond in Sarasota County.
- **Close Call:** A 37-year-old man was bitten by an alligator while cleaning debris near a pond in Sanibel. Thankfully, he suffered only minor injuries.
- **Unfortunate Encounter:** In June 2022, a toddler was found dead in the mouth of an alligator near a retention pond in Orlando.

Signage: Your First Line of Defense

Clear and conspicuous signs are essential for raising awareness and deterring risky behavior. They are helpful in demonstrating that the districts have taken reasonable steps to inform the public of potential hazards. The presence of clear and visible warning signs can serve as evidence that the district fulfilled its duty to warn, potentially reducing liability in the event of an incident. While there's no "magic language" that guarantees safety or absolves the district from liability, clear and concise wording is essential. Signs should:

- **Indicate the Hazards :** Clearly indicate the presence of wildlife, such as "Caution: Alligators May Be Present."
- **Highlight Risks:** Specify potential dangers, like "Do Not Feed or Approach Alligators."
- **Promote Safety:** Encourage responsible behavior, such as "Keep Pets on Leash" and "Supervise Children."
- **Use Visuals:** Incorporate universally recognized symbols, like alligator and snake silhouettes, for quick comprehension.
- **Align With District Policies:** Clearly communicate any district-specific rules or prohibitions, such as "No Swimming," "No Fishing," or "No Boating." Aligning signage with adopted policies reinforces safety measures.



Strategic Sign Placement

As with the absence of specific language requirements for signs, there's also no single, universally applicable placement, distance, or spacing criteria for wildlife warning signs near ponds in Florida. Several factors influence optimal placement, including:

- 1. Visibility:** Signs should be clearly visible from all potential entry points and commonly frequented areas around the pond. This includes where ponds are in close proximity to playgrounds, parks, benches, dog parks, and other amenities. Dense vegetation or obstructions might necessitate closer placement.
- 2. Terrain:** On uneven or winding paths, consider placing signs more frequently to ensure continuous visibility for approaching individuals.
- 3. Hazard proximity:** If specific dangers like steep slopes or alligator habitat are concentrated in certain areas, place signs closer to those locations for immediate attention.
- 4. Local regulations:** Some Florida municipalities might have specific regulations regarding sign spacing for retention ponds. Consult local authorities for any applicable guidelines.
- 5. Common sense:** Ultimately, use your judgment to ensure adequate coverage. If you feel a specific area lacks clear warning due to distance or other factors, add another sign for better protection.

Here are some general recommendations based on pond size and complexity:

- **Small Ponds (<1 acre):** Place signs at least every 50-75 feet around the perimeter, with additional signs at entry points and near any specific hazards.
- **Medium Ponds (1-5 acres):** Consider spacing signs every 75-100 feet, with additional signs at key access points, pathways, and potential danger zones.
- **Large Ponds (>5 acres):** Increase spacing to 100-150 feet along the main perimeter but maintain closer placement (50-75 feet) near high-traffic areas, entry points, and concentrated hazards.

Beyond Signage: A Multi-Layered Approach

While signage is a crucial first step, a comprehensive wildlife safety strategy requires a multi-layered approach. Here are some additional measures districts can implement:

- **Habitat Maintenance:** Regularly maintain landscaping to reduce areas where wildlife might seek shelter or food. This includes keeping trees and shrubs trimmed, removing debris, and securing garbage cans. Balance maintenance with other ecological requirements, including those related to conservation areas and stormwater system design criteria.
- **Physical Barriers:** In areas with high wildlife activity or known risks, districts may need to consider installing physical barriers like fences or natural buffers to deter wildlife from entering populated areas.
- **Educational Outreach:** Distribute informational materials or utilize online platforms like the district's website to educate residents about local wildlife, their behavior, and safety precautions. The Florida Fish and Wildlife Conservation Commission (FWC) offers [valuable resources](#), including the "Living with Alligators" brochure, that can be shared with the community.
- **FWC's Statewide Nuisance Alligator Program (SNAP):** Familiarize residents with the [SNAP program](#) and how to report nuisance alligators. The FWC's hotline (866-FWC-GATOR) is available 24/7 for reporting concerns.
- **Clear Policies and Procedures:** Develop and implement clear policies and procedures for handling wildlife encounters, including reporting protocols and emergency response plans.
- **Regular Inspections and Monitoring:** Conduct routine inspections of common areas to identify potential hazards or signs of wildlife activity. Promptly address any issues to maintain a safe environment.

FAQs: Addressing Liability and Signage Concerns

- **Doesn't putting up warning signs increase our liability by acknowledging the danger?**

Not necessarily. Warning signs demonstrate that the district has taken reasonable steps to inform the public about potential hazards. This proactive approach can help mitigate liability in the event of an incident by showing that the district fulfilled its duty to warn.

- **What if residents complain that the signs are unsightly?**

Aesthetics are important, but safety should always be the priority. Districts can choose well-designed signs that blend with the environment and use clear, concise language to strike a balance between visual appeal and effective communication. Perceptions that a district valued aesthetics over safety may present challenges when defending related incidents or allegations and are generally disfavored from a public policy perspective.

- **If we post signs, does that mean we're admitting we're responsible if something happens?**

No. Posting warning signs would not automatically make a district liable for any incidents. However, it demonstrates a responsible approach to safety, which can be helpful in legal proceedings. The key is to combine signage with other safety measures and ensure that the signs are clear, accurate, and strategically placed.

- **Can't we just rely on common sense? People should know there are alligators in Florida.**

While Florida is known for its wildlife, not everyone is aware of the potential dangers, especially visitors or new residents. Additionally, even those familiar with alligators may underestimate the risks or engage in risky behavior. Signs serve as a constant reminder and encourage responsible actions.

- **Our district owns a golf course with over 40 water bodies, do we need a sign at each one?**

Strategic placement is still key. For golf courses, signage at entry points serves as an initial warning and sets expectations for golfers about wildlife safety on the course. Signage within the pro-shop, near the clubhouse, halfway houses or restroom buildings can also be considered.



Wildlife warning signs are an important tool for community development districts in managing safety risks associated with local wildlife. However, they should be part of a broader wildlife management strategy that includes education, physical safety measures, and adherence to local regulations. This approach not only helps protect individuals and wildlife, but it also contributes to a safer, more informed, and more harmonious community. After all, understanding and respecting our local wildlife is part of what makes living in Florida so special.

At Florida Insurance Alliance, we understand the risks and hazards found in our member districts. If you have areas of concern or would like one of our knowledgeable loss control consultants to review and assess your district's risk management program, please contact us at riskservices@egisadvisors.com.



LAKESIDE PRESERVE COMMUNITY DEVELOPMENT DISTRICT

**Ratification of FY 2027 General Insurance and
Worker's Compensation Proposals**



Egis Insurance & Risk Advisors

Is pleased to provide a

Proposal of Insurance Coverage for:

Lakeside Preserve 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 over 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
- Risk management services including on-site loss control, property schedule verification and contract reviews
- Complimentary Property Appraisals
- 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.

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:

Lakeside Preserve Community Development District
c/o PFM Group Consulting, LLC
3501 Quadrangle Boulevard, Suite 270
Orlando, FL 32817

Term: October 1, 2026 to October 1, 2027

Quote Number: 100126336

PROPERTY COVERAGE

SCHEDULE OF COVERAGES AND LIMITS OF COVERAGE

COVERED PROPERTY	
Total Insured Values –Building and Contents – Per Schedule on file totalling	\$124,448
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
	Not Applicable	Golf Course Tees and Greens Deductible on all covered Perils if scheduled.

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

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

TOTAL PROPERTY PREMIUM

\$1,244

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	\$1,250,000 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	Glass and Sanitary Fittings Extension	\$25,000 in any one occurrence
X	BB	Awnings, Gutters and Downspouts	Included
X	CC	Lock and Key Replacement	\$2,500 any one occurrence
X	DD	Tracks and fields (except Lawns, Plants, Trees and Shrubs covered under code K)	\$250,000 any one occurrence and \$500,000 in the annual aggregate in any one coverage period. or Up to the declared value if it is specifically listed as "Tracks and Fields" in the schedule of values.
X	EE	Awnings, Gutters and Downspouts	Included
X	FF	Civil or Military Authority	45 consecutive days and one mile.

CRIME COVERAGE

<u>Description</u>	<u>Limit</u>	<u>Deductible</u>
Forgery and Alteration	\$100,000	\$1,000
Theft, Disappearance or Destruction	\$100,000	\$1,000
Computer Fraud including Funds Transfer Fraud	\$100,000	\$1,000
Employee Dishonesty, including faithful performance, per loss	\$100,000	\$1,000

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
Abuse and Molestation Limit (Added by Claims Made Endorsement)	Not Included
Abuse and Molestation Aggregate Limit (Added by Claims Made Endorsement)	Not Included
Abuse and Molestation Retroactive Date	Not Included
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

Retroactive Date:

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
Fraudulent Instruction: \$25,000



PREMIUM SUMMARY

Lakeside Preserve Community Development District
c/o PFM Group Consulting, LLC
3501 Quadrangle Boulevard, Suite 270
Orlando, FL 32817

Term: October 1, 2026 to October 1, 2027

Quote Number: 100126336

PREMIUM BREAKDOWN

Property (Including Scheduled Inland Marine)	\$1,244
Crime	\$500
Automobile Liability	Not Included
Hired Non-Owned Auto	Included
Auto Physical Damage	Not Included
General Liability	\$4,157
Public Officials and Employment Practices Liability	\$3,399
Deadly Weapon Protection Coverage	Included
TOTAL PREMIUM DUE	\$9,300

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., 10/01/2026, and if accepted by the FIA's duly authorized representative, does hereby agree as follows:

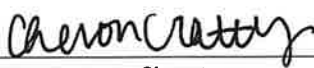
- (a) That, by this reference, the terms and provisions of the Interlocal Agreement creating the Florida Insurance Alliance are hereby adopted, approved and ratified by the undersigned local governmental entity. The undersigned local governmental entity certifies that it has received a copy of the aforementioned 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 the Applicant desire to cancel coverage; it will give not less than ninety (90) days prior written notice of cancellation;
- (e) That if the Fund desire to cancel coverage; it will give not less than thirty (30) days prior written notice of cancellation;
- (f) 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.

Lakeside Preserve Community Development District

(Name of Local Governmental Entity)

By: 
Signature

Milton Andrade
Print Name

Witness By: 
Signature

Chevon Crotty
Print Name

IS HEREBY APPROVED FOR MEMBERSHIP IN THIS FUND, AND COVERAGE IS EFFECTIVE October 1, 2026

By: _____
Administrator



PROPERTY VALUATION AUTHORIZATION

Lakeside Preserve Community Development District
c/o PFM Group Consulting, LLC
3501 Quadrangle Boulevard, Suite 270
Orlando, FL 32817

QUOTATIONS TERMS & CONDITIONS

1. Please review the quote carefully for coverage terms, conditions, and limits.
2. The coverage is subject to 25% 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 | \$124,448 As per schedule attached |
| ☐ Inland Marine | Not Included |
| ☐ Auto Physical Damage | Not Included |

Signature:  Date: 10/5/20

Name: Milton Andrade

Title: CHAIRMAN



Property Schedule

Schedule Items Effective As of: 10/01/2026

Lakeside Preserve Community Development District

Policy No.: 100126336

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

Unit #	Description		Year Built	Eff. Date	Building Value	Total Insured Value
	Address		Const Type	Term Date	Contents Value	
	Roof Shape	Roof Pitch		Roof Covering	Covering Replaced	
1	Perimeter Wall		2019	10/01/2026	\$54,108	\$54,108
	Lakeside Preserve Blvd Lakeland FL 33811		Masonry non combustible	10/01/2027		
Unit #	Description		Year Built	Eff. Date	Building Value	Total Insured Value
	Address		Const Type	Term Date	Contents Value	
	Roof Shape	Roof Pitch		Roof Covering	Covering Replaced	
2	Entranceway Monument		2019	10/01/2026	\$54,108	\$54,108
	Lakeside Preserve Blvd Lakeland FL 33811		Masonry non combustible	10/01/2027		
Unit #	Description		Year Built	Eff. Date	Building Value	Total Insured Value
	Address		Const Type	Term Date	Contents Value	
	Roof Shape	Roof Pitch		Roof Covering	Covering Replaced	
3	Metal Fence w/Masonry Columns		2019	10/01/2026	\$16,232	\$16,232
	Lakeside Preserve Blvd Lakeland FL 33811		Non combustible	10/01/2027		
			Total:	Building Value \$124,448	Contents Value \$0	Insured Value \$124,448

Sign: 

Print Name:

Milton Andrade

Date:

10/5/2026



Egis Insurance & Risk Advisors

Is pleased to provide a

Proposal of Insurance Coverage for:

Workers Compensation

Lakeside Preserve 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.

Quotation being provided for:

Lakeside Preserve Community Development District
3501 Quadrangle Boulevard, Suite 270
Orlando, FL 32817

Term: October 1, 2026 to October 1, 2027
Coverage Provided by: Florida Insurance Alliance
Quote Number: WC100126336

TYPE OF INSURANCE

Part A	Workers Compensation • Benefits: FL Statutory (Medical, Disability, Death)
Part B	Employers Liability: • \$1,000,000- Each Accident • \$1,000,000- Disease- Policy Limit • \$1,000,000- Disease- Each Employee

Class Code	Description	Payroll	Rate	Premium
8810	Clerical Office Employees NOC.	\$3,600	0.11	\$3.96
Total Manual Premium				\$3.96
Increased ELL 1M/1M/1M				\$120.00
				\$123.96
Workplace Safety Credit – 2%				\$0.00
Drug Free Workplace Credit – 5%				\$0.00
Experience Modification				1.000000
Standard Premium				\$123.96
Expense Constant				\$160.00
Terrorism				\$0.36
Policy Total				\$850.00

Additional terms and conditions, including but not limited to:

1. Please review the quote carefully, as coverage terms and conditions may not encompass all requested coverages.
2. The Coverage Agreement premium shall be pro-rated as of the first day of coverage from the minimum policy premium.
3. Down payment is due at inception.
4. The Trust requires that the Member maintains valid and current certificates of workers' compensation insurance on all work performed by persons other than its employees.
5. If NCCI re-promulgates a mod, we will honor the mod as promulgated. If the mod changes during the fund year, we reserve the right to apply a correct mod back to the inception date of the Coverage Agreement.
6. Safety and Drug Free program credits (if applicable) are subject to program requirements.
7. Payrolls are subject to final audit.
8. Deletion of any coverage presented, Package and/or Workers' Compensation, will result in re-pricing of account.





LAKESIDE PRESERVE COMMUNITY DEVELOPMENT DISTRICT

**Ratification of Prince & Sons Proposal to Flush
Cut and Disposal of Oak Tree**



200 S. F. Street
Haines City, Florida 33844

Phone 863-422-5207 | Fax 863-422-1816

Polk County License # 214815

Date: October 2, 2026

SUBMITTED TO:

CDD-PFM Group
Quadrangle Boulevard Suite 270
Orlando, FL. 32817

Lisa Dixon

Phone: 727-451-7903

Email: Ldixon@triadassocmgmt.com

Job Name / Location:

Lakeside Preserve
4006 Shearwater St.
Lakeland, FL. 33811

PROPOSAL TO FLUSH CUT OAK TREE ON CDD POND

	Qty	Unit	Unit Cost	TOTAL
Flush Cut and Disposal	1	ea	\$150.00	\$150.00
			Total:	\$150.00

The customer agrees, that by signing this proposal, it shall become a legal and binding contract and shall supersede any previous agreements, discussed or implied. The customer further agrees to all terms and conditions set forth within and shall be responsible for any/all court and/or attorney fees incurred by Prince and Sons, Inc. required to obtain collection for any portion of money owed for material and/or work performed by Prince and Sons Inc.

Submitted by: Cheryl Bachman

Date Submitted: October 2, 2026

Accepted by: Kwame Jackson

Date Accepted: 10/5/2026



LAKESIDE PRESERVE COMMUNITY DEVELOPMENT DISTRICT

**Ratification of Additional Service Order with
Prince & Sons for Irrigation Repairs**

**AMENDED AND RESTATED AGREEMENT FOR LANDSCAPE AND IRRIGATION
MAINTENANCE SERVICES ADDITIONAL SERVICES ORDER**

THIS ADDITIONAL SERVICES ORDER (the “ASO”) is presented according to the requirements established within the executed *Amended and Restated Agreement for Landscape and Irrigation Maintenance Services* dated December 1, 2025, as amended (the “Agreement”). This ASO is made and entered into effective this 26th day of August 2026, by and between:

LAKESIDE PRESERVE COMMUNITY DEVELOPMENT DISTRICT, a local unit of special-purpose government established pursuant to Chapter 190, Florida Statutes, located in the City of Lakeland, Florida, with a mailing address of c/o PFM Group Consulting, LLC, 3501 Quadrangle Boulevard, Suite 270, Orlando, Florida 32817 (the “**District**”), and

PRICE AND SONS, INC., a Florida corporation, with a mailing address of 200 South F Street, Haines City, Florida 33844 (the “**Contractor**” and, together with the District, the “**Parties**”).

1. SCOPE OF WORK. In addition to the services described in the Agreement and any Exhibits thereto, Contractor will provide the additional work described below, in accordance with the unit prices pricing provided herein (the “**Additional Work**”). Contractor shall invoice the District for the Additional Work actually performed, and the District shall remit payment for such Additional Work pursuant to the terms of the Agreement. Such amount includes all materials and labor necessary to complete the Additional Work and all items, labor, materials, or otherwise, to provide the District the maximum benefit of the Additional Work.

Proposal Name	Cost	Notes
Irrigation Repairs (Exhibit A)	\$776.56	N/A
Total		\$776.56

2. EFFECTIVE DATE. This ASO shall be effective as of the date listed above.

3. ACCEPTANCE. Execution of this ASO will authorize Contractor to complete the Additional Work as outlined above in addition to any other services set forth in the Agreement. Contractor shall commence the aforesaid authorized Additional Work as provided herein and shall perform the same in accordance with the terms and conditions of the Agreement, which, except to the extent expressly altered or changed in this ASO, remain in full force and effect. To the extent that any other terms provided in **Exhibit A** conflict with the terms of the executed Agreement, the terms of the Agreement shall control.

IN WITNESS WHEREOF, the Parties hereto have caused this ASO to be executed the day and year first above written.

**LAKESIDE PRESERVE COMMUNITY
DEVELOPMENT DISTRICT**



Signature

By: Milton Andrade
Print Name

Its: Chairman, Board of Supervisors
Title

PRINCE AND SONS, INC.



Signature

By: Lucas Marion
Print Name

Its: VJ?
Title

Exhibit A: Irrigation Repairs

Exhibit A
Irrigation Repairs



**PRINCE
& SONS INC.**

200 S. F. Street, Haines City, FL 33844

www.princeandsons.com

Phone 863-422-5207

State of Florida License # CGC1521568
Polk County License # 15453

Date: 8.3.26

SUBMITTED TO:

Triad

4006 Shearwater st

Lakeland, FL 33811

CAM: Yalma Morales

Phone: 352.602.4803

Email: YRodriguezMorales@triadassoon.com

Job Name / Location:

Lakeside Preserve CDD

Lakeland, FL 33811

We hereby submit an proposal to provide the material and labor for the scope of work:

To investigate overcurrent on system to find bad decoder, which is preventing the system from operating. If there is more than 1 bad decoder the second one will need to be proposed.

Wire tracking	7	\$75.00	\$525.00
Hunter single station decoder	1	\$186.56	\$186.56
Labor	1	\$65.00	\$65.00
Total			\$776.56

EXCLUSIONS & SUBSTITUTIONS:

MATERIAL & LABOR NOT TO EXCEED

GENERAL TERMS:

1. Payment to be remitted within 30 days upon completion (no exceptions).
2. Prices good for 30 days - P&S reserves the right to re-bid after 30 days.

Prince and Sons, Inc. Authorized Signature:

Josh Christian

Account Manager

James Smith

Irrigation Manager

Jason Seiple

Technician

Approved By: _____



LAKESIDE PRESERVE COMMUNITY DEVELOPMENT DISTRICT

**Ratification of Requisition Nos. 153 – 159 Paid
Through Developer Funds**

LAKESIDE PRESERVE COMMUNITY DEVELOPMENT DISTRICT

DISTRICT OFFICE • 3501 QUADRANGLE BLVD STE 270 • ORLANDO, FL 32817
PHONE: (407) 723-5900 • FAX: (407) 723-5901

Requisition Recap For Board Approval

Attached please find the listing of requisitions approved to be paid from Developer Funding from June 1, 2026 through August 31, 2026. This does not include requisitions previously approved by the Board.

REQUISITION NO.	PAYEE	AMOUNT
153	Hunter Engineering	\$2,578.75
154	Koss Fence LLC	\$3,500.00
155	Clayton Properties	\$6,960.00
156	The Ditch Whisperer	\$1,392.50
157	Tiger Contracting	\$698,156.32
158	The Ditch Whisperer	\$5,242.50
159	Eden Landscape Enterprises	\$115,663.69
Total		\$833,493.76

Approval of Expenditures:

----- Chairman

- ----- Vice Chairman

- ----- Assistant Secretary



LAKESIDE PRESERVE COMMUNITY DEVELOPMENT DISTRICT

Review of Monthly Financials



Lakeside Preserve CDD

August 2026 Financial Report

August 31, 2026

PFM Management Service LLC

3501 Quadrangle Blvd.,
Suite 270
Orlando, Florida 32817
Tel: 407-723-5900



Lakeside Preserve CDD
Statement of Financial Position
As of 8/31/2026

	General Fund	Debt Service Fund	Capital Projects Fund	Long-Term Debt Fund	Total
<u>Assets</u>					
<u>Current Assets</u>					
General Checking Account	\$ 270,134.95				\$ 270,134.95
Checking Account - Reserve	118,941.24				118,941.24
Prepaid Expenses	3,192.09				3,192.09
Deposits	305.50				305.50
Series 2019 Debt Service Reserve		\$ 89,609.37			89,609.37
Series 2023 Debt Service Reserve		733,412.50			733,412.50
Series 2019 Revenue		192,400.50			192,400.50
Series 2023 Revenue		628,954.80			628,954.80
Series 2019 Prepayment		17.92			17.92
Series 2023 Prepayment		1,175,545.78			1,175,545.78
Series 2019 General Fund		2.44			2.44
Series 2019 Sinking Fund		866.18			866.18
Due From Other Funds			\$ 140,663.69		140,663.69
Series 2023 Acquisition/Construction			19,124.02		19,124.02
Total Current Assets	\$ 392,573.78	\$ 2,820,809.49	\$ 159,787.71	\$ -	\$ 3,373,170.98
<u>Investments</u>					
Amount Available in Debt Service Funds				\$ 2,820,809.49	\$ 2,820,809.49
Amount To Be Provided				7,439,190.51	7,439,190.51
Total Investments	\$ -	\$ -	\$ -	\$ 10,260,000.00	\$ 10,260,000.00
Total Assets	\$ 392,573.78	\$ 2,820,809.49	\$ 159,787.71	\$ 10,260,000.00	\$ 13,633,170.98
<u>Liabilities and Net Assets</u>					
<u>Current Liabilities</u>					
Accounts Payable	\$ 32,070.09				\$ 32,070.09
Due To Other Funds	140,663.69				140,663.69
Accounts Payable			\$ 143,400.03		143,400.03
Total Current Liabilities	\$ 172,733.78	\$ -	\$ 143,400.03	\$ -	\$ 316,133.81
<u>Long Term Liabilities</u>					
Revenue Bonds Payable - Long-Term				\$ 10,260,000.00	\$ 10,260,000.00
Total Long Term Liabilities	\$ -	\$ -	\$ -	\$ 10,260,000.00	\$ 10,260,000.00
Total Liabilities	\$ 172,733.78	\$ -	\$ 143,400.03	\$ 10,260,000.00	\$ 10,576,133.81
<u>Net Assets</u>					
Net Assets, Unrestricted	\$ (4,500.00)				\$ (4,500.00)
Net Assets - General Government	217,488.16				217,488.16
Current Year Net Assets - General Government	6,851.84				6,851.84
Net Assets, Unrestricted		\$ 2,619,029.72			2,619,029.72
Current Year Net Assets, Unrestricted		201,779.77			201,779.77
Net Assets, Unrestricted			\$ (807,113.50)		(807,113.50)
Current Year Net Assets, Unrestricted			823,501.18		823,501.18
Total Net Assets	\$ 219,840.00	\$ 2,820,809.49	\$ 16,387.68	\$ -	\$ 3,057,037.17
Total Liabilities and Net Assets	\$ 392,573.78	\$ 2,820,809.49	\$ 159,787.71	\$ 10,260,000.00	\$ 13,633,170.98



Lakeside Preserve CDD
Statement of Activities
As of 8/31/2026

	General Fund	Debt Service Fund	Capital Projects Fund	Long-Term Debt Fund	Total
<u>Revenues</u>					
On-Roll Assessments	\$ 244,013.64				\$ 244,013.64
Off-Roll Assessments	85,997.24				85,997.24
Inter-Fund Transfers In	(400.50)				(400.50)
On-Roll Assessments		\$ 558,985.41			558,985.41
Off-Roll Assessments		322,602.94			322,602.94
Other Assessments		2,298,210.42			2,298,210.42
Inter-Fund Group Transfers In		(22,745.24)			(22,745.24)
Developer Contributions			\$ 1,470,967.22		1,470,967.22
Inter-Fund Transfers In			23,145.74		23,145.74
Total Revenues	\$ 329,610.38	\$ 3,157,053.53	\$ 1,494,112.96	\$ -	\$ 4,980,776.87
<u>Expenses</u>					
Supervisor Fees	\$ 4,800.00				\$ 4,800.00
POL Insurance	3,162.00				3,162.00
Trustee Services	8,512.26				8,512.26
Management	27,500.00				27,500.00
Field Management	2,200.00				2,200.00
Engineering	4,936.25				4,936.25
Disclosure	4,000.00				4,000.00
Property Appraiser	12,267.19				12,267.19
District Counsel	14,759.76				14,759.76
Assessment Administration	15,000.00				15,000.00
Reamortization Schedules	500.00				500.00
Audit	6,500.00				6,500.00
Tax Preparation	29.34				29.34
Postage & Shipping	480.76				480.76
Legal Advertising	1,467.82				1,467.82
Meeting Room	490.00				490.00
Web Site Maintenance	2,350.00				2,350.00
Dues, Licenses, and Fees	175.00				175.00
Electric	1,159.73				1,159.73
Lake/Pond Repair	24,500.00				24,500.00
General Insurance	3,867.00				3,867.00
Property & Casualty	1,617.00				1,617.00
Other Insurance	1,350.00				1,350.00
Irrigation	13,435.27				13,435.27
Lake Maintenance	15,584.72				15,584.72
Landscaping Maintenance & Material	153,321.50				153,321.50
Landscape Improvements	4,300.00				4,300.00
Contingency	3,250.00				3,250.00
Signage & Amenities Repair	925.00				925.00
Miscellaneous	1,216.62				1,216.62
Principal Payments - S2019 bond		\$ 30,000.00			30,000.00
Principal Payments - S2023 bond		2,250,000.00			2,250,000.00
Interest Payments - S2019 Bond		59,825.00			59,825.00
Interest Payments - S2023 bond		677,901.57			677,901.57
District Counsel			\$ 400.50		400.50
Capital Expenditures			671,356.08		671,356.08
Total Expenses	\$ 333,657.22	\$ 3,017,726.57	\$ 671,756.58	\$ -	\$ 4,023,140.37
<u>Other Revenues (Expenses) & Gains (Losses)</u>					
Interest Income	\$ 10,898.68				\$ 10,898.68
Interest Income		\$ 62,452.81			\$ 62,452.81
Interest Income			\$ 1,144.80		\$ 1,144.80
Total Other Revenues (Expenses) & Gains (Losses)	\$ 10,898.68	\$ 62,452.81	\$ 1,144.80	\$ -	\$ 74,496.29
Change In Net Assets	\$ 6,851.84	\$ 201,779.77	\$ 823,501.18	\$ -	\$ 1,032,132.79
Net Assets At Beginning Of Year	\$ 212,988.16	\$ 2,619,029.72	\$ (807,113.50)	\$ -	\$ 2,024,904.38
Net Assets At End Of Year	\$ 219,840.00	\$ 2,820,809.49	\$ 16,387.68	\$ -	\$ 3,057,037.17



Lakeside Preserve CDD
Budget to Actual
For the Month Ending 08/31/2026

	YTD Actual	YTD Budget	YTD Variance	FY 2026 Adopted Budget	Percentage Spent
<u>Revenues</u>					
On-Roll Assessments	\$ 244,013.64	\$ 224,442.19	\$ 19,571.46	\$ 244,846.02	99.66%
Off-Roll Assessments	85,997.24	78,830.80	7,166.44	85,997.24	100.00%
Carry Forward Revenue	54,083.33	4,916.67	49,166.67	59,000.00	91.67%
Net Revenues	\$ 384,094.21	\$ 308,189.66	\$ 75,904.56	\$ 389,843.26	98.53%
<u>General & Administrative Expenses</u>					
Supervisor Fees	\$ 4,800.00	\$ 4,583.33	\$ 216.67	\$ 5,000.00	96.00%
POL Insurance	3,162.00	3,076.33	85.67	3,356.00	94.22%
Trustee Services	8,512.26	7,802.91	709.36	8,512.26	100.00%
Management	27,500.00	27,500.00	-	30,000.00	91.67%
Field Management	2,200.00	2,200.00	-	2,400.00	91.67%
Engineering	4,936.25	9,166.67	(4,230.42)	10,000.00	49.36%
Disclosure	4,000.00	5,958.33	(1,958.33)	6,500.00	61.54%
Property Appraiser	12,267.19	9,166.67	3,100.52	10,000.00	122.67%
District Counsel	14,759.76	14,666.67	93.09	16,000.00	92.25%
Assessment Administration	15,000.00	13,750.00	1,250.00	15,000.00	100.00%
Reamortization Schedules	500.00	916.67	(416.67)	1,000.00	50.00%
Audit	6,500.00	5,500.00	1,000.00	6,000.00	108.33%
Arbitrage Calculation	-	458.33	(458.33)	500.00	0.00%
Tax Preparation	29.34	45.83	(16.49)	50.00	58.68%
Travel and Per Diem	-	229.17	(229.17)	250.00	0.00%
Postage & Shipping	480.76	275.00	205.76	300.00	160.25%
Legal Advertising	1,467.82	1,833.33	(365.51)	2,000.00	73.39%
Meeting Room	490.00	641.67	(151.67)	700.00	70.00%
Web Site Maintenance	2,350.00	2,695.00	(345.00)	2,940.00	79.93%
Dues, Licenses, and Fees	175.00	160.42	14.58	175.00	100.00%
Total General & Administrative Expenses	\$ 109,130.38	\$ 110,626.32	\$ (1,495.94)	\$ 120,683.26	90.43%
<u>Field Expenses</u>					
Electric	\$ 1,159.73	\$ 5,958.33	\$ (4,798.60)	\$ 6,500.00	17.84%
Amenity - Pool Furniture/ Repair/Replace	-	1,833.33	(1,833.33)	2,000.00	0.00%
Amenity - Pool Maintenance	-	4,400.00	(4,400.00)	4,800.00	0.00%
Amenity - Access Control	-	4,583.33	(4,583.33)	5,000.00	0.00%
Amenity - Janitorial	-	2,062.50	(2,062.50)	2,250.00	0.00%
Amenity - Pest Control	-	733.33	(733.33)	800.00	0.00%
General Insurance	3,867.00	3,762.00	105.00	4,104.00	94.23%
Property & Casualty	1,617.00	16,826.33	(15,209.33)	18,356.00	8.81%
Other Insurance	1,350.00	1,237.50	112.50	1,350.00	100.00%



Lakeside Preserve CDD
Budget to Actual
For the Month Ending 08/31/2026

	YTD Actual	YTD Budget	YTD Variance	FY 2026 Adopted Budget	Percentage Spent
Irrigation	13,435.27	12,833.33	601.94	14,000.00	95.97%
Lake Maintenance	15,584.72	32,083.33	(16,498.61)	35,000.00	44.53%
Lake/Pond Repair	24,500.00	-	24,500.00	-	0.00%
Landscaping Maintenance & Material	153,321.50	123,750.00	29,571.50	135,000.00	113.57%
Landscape Improvements	4,300.00	9,166.67	(4,866.67)	10,000.00	43.00%
Contingency / Miscellaneous	4,466.62	22,916.67	(18,450.05)	25,000.00	17.87%
Signage & Amenities Repair	925.00	-	925.00	-	0.00%
Reserve Account	-	4,583.33	(4,583.33)	5,000.00	0.00%
Total Field Expenses	\$ 224,526.84	\$ 246,730.00	\$ (22,203.16)	\$ 269,160.00	83.42%
Total Expenses	\$ 333,657.22	\$ 357,356.32	\$ (23,699.10)	\$ 389,843.26	85.59%
Income (Loss) from Operations	\$ 50,436.99	\$ (49,166.67)	\$ 99,603.66	\$ -	
<u>Other Income (Expense)</u>					
Interest Income	\$ 10,898.68	\$ -	\$ 10,898.68	\$ -	
Total Other Income (Expense)	\$ 10,898.68	\$ -	\$ 10,898.68	\$ -	
Net Income (Loss)	\$ 61,335.67	\$ (49,166.67)	\$ 110,502.34	\$ -	



LAKESIDE PRESERVE COMMUNITY DEVELOPMENT DISTRICT

Staff Reports



LAKESIDE PRESERVE COMMUNITY DEVELOPMENT DISTRICT

District Manager



Lakeside Preserve Field Service Report

PFM Field Service

Yaima Rodriguez Morales

yrodriguezmorales@triadassocmgmt.com

(352) 602-4803

Created: Wednesday, 8/19/2026

(1)



Pond 2

Created: Wed, 8/19/2026

(2)



Pond 2

Created: Wed, 8/19/2026

Green algae and trash

Title: Report: 8/19/2026 09:20
Group: Lakeside Preserve

Created: Wed, 8/19/2026
No. Items: 39

(3)



Pond 3

Created: Wed, 8/19/2026

(4)



Pond 4

Created: Wed, 8/19/2026

Title: Report: 8/19/2026 09:20
Group: Lakeside Preserve

Created: Wed, 8/19/2026
No. Items: 39

(5)



Pond 4

Created: Wed, 8/19/2026

(6)



Between pond 4 & 5

Created: Wed, 8/19/2026

Title: Report: 8/19/2026 09:20
Group: Lakeside Preserve

Created: Wed, 8/19/2026
No. Items: 39

(7)



Pond 5

Created: Wed, 8/19/2026

(8)



Pond 5

Created: Wed, 8/19/2026

(9)



Pond 11

Created: Wed, 8/19/2026

(10)



Between pond 5 & 11

Created: Wed, 8/19/2026

Title: Report: 8/19/2026 09:20
Group: Lakeside Preserve

Created: Wed, 8/19/2026
No. Items: 39

(11)



Pond 6

Created: Wed, 8/19/2026

(12)



Decolored lawn besides pond 6

Created: Wed, 8/19/2026

(13)



Between ponds 6 & 7

Created: Wed, 8/19/2026

(14)



Pond 7

Created: Wed, 8/19/2026

(15)



Decoloured/dead lawn pond 7

Created: Wed, 8/19/2026

(16)



Pond 8

Created: Wed, 8/19/2026

Title: Report: 8/19/2026 09:20
Group: Lakeside Preserve

Created: Wed, 8/19/2026
No. Items: 39

(17)



Pond 8

Created: Wed, 8/19/2026

(18)



Pond 10

Created: Wed, 8/19/2026

Title: Report: 8/19/2026 09:20
Group: Lakeside Preserve

Created: Wed, 8/19/2026
No. Items: 39

(19)



Pond 14

Created: Wed, 8/19/2026

(20)



Created: Wed, 8/19/2026

Title: Report: 8/19/2026 09:20
Group: Lakeside Preserve

Created: Wed, 8/19/2026
No. Items: 39

(21)



Created: Wed, 8/19/2026

(22)



Pond 13

Created: Wed, 8/19/2026

Title: Report: 8/19/2026 09:20
Group: Lakeside Preserve

Created: Wed, 8/19/2026
No. Items: 39

(23)



Pond 13

Created: Wed, 8/19/2026

Algae

(24)



Pond 14

Created: Wed, 8/19/2026

(25)



Pond 14

Created: Wed, 8/19/2026

Trash

(26)



Cattail Marsh Dr.

Created: Wed, 8/19/2026

Title: Report: 8/19/2026 09:20
Group: Lakeside Preserve

Created: Wed, 8/19/2026
No. Items: 39

(27)



Created: Wed, 8/19/2026

(28)



Pond 14

Created: Wed, 8/19/2026

Title: Report: 8/19/2026 09:20
Group: Lakeside Preserve

Created: Wed, 8/19/2026
No. Items: 39

(29)



Pond 15

Created: Wed, 8/19/2026

(30)



River Birch

Created: Wed, 8/19/2026

(31)



Conservation area

Created: Wed, 8/19/2026

(32)



Conservation area

Created: Wed, 8/19/2026

Title: Report: 8/19/2026 09:20
Group: Lakeside Preserve

Created: Wed, 8/19/2026
No. Items: 39

(33)



Pond 14

Created: Wed, 8/19/2026

Algae

(34)



Pond 1

Created: Wed, 8/19/2026

Title: Report: 8/19/2026 09:20
Group: Lakeside Preserve

Created: Wed, 8/19/2026
No. Items: 39

(35)



Pond 9

Created: Wed, 8/19/2026

(36)



Entrance - left

Created: Wed, 8/19/2026

Title: Report: 8/19/2026 09:20
Group: Lakeside Preserve

Created: Wed, 8/19/2026
No. Items: 39

(37)



Perimeter

Created: Wed, 8/19/2026

(38)



Entrance - right

Created: Wed, 8/19/2026

Title: Report: 8/19/2026 09:20
Group: Lakeside Preserve

Created: Wed, 8/19/2026
No. Items: 39

(39)



Perimeter

Created: Wed, 8/19/2026

Phase 2 Pond Map



Phase 1 Pond Map



1

1

LANDMARK
Engineering & Surveying Corporation

8515 Palm River Road
(813) 621-7841
www.landmark.com

Tampa, Florida 33619
(813) 664-1832 (fax)
C.A. # 28014

LAKESIDE PRESERVE CDD

12051 CORPORATE BLVD.
ORLANDO, FLORIDA 32817
Phone (407) 382-3256

LAKESIDE PRESERVE

HILLSBOROUGH COUNTY, FLORIDA

CDD OWNED PROPERTY
05-02-2019

DATE:	5/2/19
DRAWN BY:	TCA
CHECKED BY:	TCA
DWG NO.:	2170075