Artisan Lakes Community Development District

Manatee County, FL

Meeting Agenda December 3, 2026



PFM Management Services LLC
James P. Ward | Vivian Carvalho
District Manager
3501 Quadrangle Blvd., Suite 270
Orlando, FL 32817
Phone: 954.658.4900 | 407.723.5945

3501 Quadrangle Boulevard, Suite 270
Orlando, Florida 32817
407.723.5900 | pfmmanagement.com

Artisan Lakes Community Development District

www.ArtisanLakescdd.org

Board of Supervisors

Peter R. Latessa, Chairman
Tom Carpenter, Vice Chairman
Deborah Reynolds, Assistant Secretary
Jaynie Kristine Guillou, Assistant Secretary
Matt Moore, Assistant Secretary

James P. Ward, District Manager
Vivian Carvalho, District Manager
wardj@pfm.com | carvalhov@pfm.com
Phone: (954) 658-4900 | (407) 723-5945
3501 Quadrangle Boulevard, Suite 270
Orlando, Florida 32817

Meeting Link: https://pfmcdd.webex.com/pfmcdd/j.php?MTID=m4a33626f112e88839f68dcf165fc113d
Phone: (844) 621-3956; Code: **2538 832 4176**; Event Password**: Jpward**

DECEMBER 2026

M	T	W	T	F	S	S
						1
	1	2	**3**	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

The Public is provided with two opportunities to speak during the meeting. The first time is on each agenda item, and the second time is at the end of the agenda, on any other matter not on the agenda. These are limited to three (3) minutes unless further time is granted by the Presiding Officer. All remarks should be addressed to the Board as a body and not to any member of the Board or staff. Please state your name and the name of the entity represented (if applicable) and the item on the agenda to be addressed.

Pursuant to Florida Statutes 286.0105, if a person decided to appeal any decision made by the body with respect to any matter considered at such meeting, he or she will need a record of the proceedings, and for such purpose, he or she may need to ensure that a verbatim record of the proceedings is made, which record includes testimony and evidence upon which the appeal is to be based.

The following is the agenda for the upcoming Meeting of the Board of Supervisors for the Artisan Lakes Community Development District ("District"), scheduled to be held at **3:30 p.m. on Thursday, December 3, 2026**, at the Artisan Lakes Clubhouse, 4725 Los Robles Court, Palmetto, Florida 34221.

AGENDA

---

1. Call to Order & Roll Call.

2. Administration of the oath of office for Seat 1: Ms. Debbie Reynolds, Seat 4: Mr. Peter Latessa, and Seat 5: Mr. Matt Moore who were elected at the November 3, 2026, general election.
   I. Oath of Office.

   Pages 7-8

3. Consideration of **Resolution 2027-2**, a Resolution of the Board of Supervisors re-designating the Officers of the District; providing for severability and invalid provisions; providing for conflict and providing for an effective date.

   Pages 9-11

4. Minutes:
   I. November 5, 2026 – Regular Meeting.

   Pages 12-24

5. Consideration of **Resolution 2027-3**, a Resolution of the Board of Supervisors Designating the Registered Agent; Designating the Office and Location of the Registered Office; and Providing for Conflicts and Invalid Provisions and Providing for an Effective Date.

   Pages 25-27

6. Consideration of **Resolution 2027-4**, a Resolution of the Board of Supervisors Adopting Goals, Objectives, and Performance Measures and Standards for Fiscal Year 2027; Providing a Severability Clause; and Providing an Effective Date.

   Pages 28-35

7. Staff Reports.
   I. District Attorney
   II. District Engineer
   III. District Manager
      a) ***Meeting Dates for Fiscal Year 2027:***
         - NEXT MEETING: **Thursday, January 7, 2027,** Regular Meeting.
      b) Commission on Ethics Required Annual Ethics Training Memorandum.
      c) Financial Statements for the period ending October 31, 2026 (unaudited).

      Pages 36-48

8. Supervisors' Requests.

9. Public Comments for Non-Agenda items.

   These are limited to three (3) minutes and individuals are permitted to speak on items not included in the agenda.

10. Adjournment.

Meeting Schedule – FY 2027		
	Thursday, October 1, 2026	**Thursday, November 5, 2026**
	Thursday, December 3, 2026	**Thursday, January 7, 2027**
	Thursday, February 4, 2027	**Thursday, March 4, 2027**
	Thursday, April 1, 2027	**Thursday, May 6, 2027**
	Thursday, June 3, 2027	**Thursday, July 1, 2027**
	Thursday, August 5, 2027	**Thursday, September 2, 2027**

This portion of the agenda is provided for a more comprehensive explanation of the items for consideration by the Board of Supervisors during the meeting.

Item 2: Is the administration of the oath of office for Seat 1: Ms. Debbie Reynolds, Seat 4: Mr. Peter Latessa, and Seat 5: Mr. Matt Moore who were elected at the November 3, 2026, election.

Each take their seat as a matter of law fourteen (14) days after the election and have already taken the Oath from the State. This is the form of oath for Community Development Districts and I will administer this Oath to Ms. Debbie Reynolds, Mr. Peter Latessa, and Mr. Matt Moore. You will also be asked to sign an Oath that you receive directly from either the Supervisor of Elections OR from the State – if you do receive, please sign that Oath also, and pay the required fee.

Item 3: **Resolution 2027-2**, a Resolution of the Board of Supervisors re-designating the Officers of the District; providing for severability and invalid provisions; providing for conflict and providing for an effective date.

The below are the current officers of the District:

OFFICE	NAME OF OFFICE HOLDER
CHAIRPERSON	PETER LATESSA
VICE-CHAIRPERSON	TOM CARPENTER
ASSISTANT SECRETARY	DEBORAH REYNOLDS
ASSISTANT SECRETARY	JAYNIE KRISTINE GUILLOU
ASSISTANT SECRETARY	MATT MOORE
SECRETARY & TREASURER	VIVIAN CARVALHO
ASSISTANT SECRETARY & ASSISTANT TREASURER	JAMES P. WARD
ASSISTANT TREASURER	JENNIFER GLASGOW
ASSISTANT SECRETARY	CORI DISSINGER

Included in this Resolution the District staff will be included as follows; Ms. Vivian Carvalho will be added as Secretary/Treasurer, Mr. James P. Ward, Assistant Treasurer/Assistant Secretary, Ms. Jennifer Glasgow as Assistant Treasurer, and Cori Dissinger as Assistant Secretary.

The Board may by motion re-elect all officers to their current positions or take up each seat individually by motion and vote on each individual position.

Once completed, then the Board will take up **Resolution 2027-2** to include the names of each member selected for the officer position.

Item 4: Minutes – November 5, 2026 – Regular Meeting.

Item 5: **Resolution 2027-3**, a Resolution of the Board of Supervisors Designating the Registered Agent; Designating the Office and Location of the Registered Office; and Providing for Conflicts and Invalid Provisions and Providing for an Effective Date.

Item 6: **Resolution 2027-4**, a Resolution of the Board of Supervisors Adopting Goals, Objectives, and Performance Measures and Standards for Fiscal Year 2027; Providing a Severability Clause; and Providing an Effective Date.

Item 7: Staff Reports: Staff Reports are an opportunity to communicate to the Board of Supervisors on matters that did not require Board action or that did not appear on the Agenda and the Professional Staff deemed this to be of a matter that was to be brought to the attention for action or informational purposes of the Board of Supervisors before the ensuing Board of Supervisors Meeting.

Oath of Office

OATH OR AFFIRMATION OF OFFICE

I, _____, a citizen of the State of Florida and of the United States of America, and being an officer of the **Artisan Lakes Community Development District** and a recipient of public funds as such officer, do hereby solemnly swear or affirm that I will support the Constitution of the United States and of the State of Florida, and will faithfully, honestly and impartially discharge the duties devolving upon me as a member of the Board of Supervisors of the **Artisan Lakes Community Development District**, Manatee County, Florida.

_____
Signature

Printed Name:_____

STATE OF FLORIDA
COUNTY OF _____

Sworn to (or affirmed) before me by means of ☐ Physical presence or ☐ online notarization this ___ day of _____, 2026, by _____, whose signature appears hereinabove, ☐who is personally known to me or ☐who produced _____ as identification.

_____
NOTARY PUBLIC
STATE OF FLORIDA

Print Name:_____

My Commission Expires:_____

Resolution 2027-2

RESOLUTION 2027-2

A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE ARTISAN LAKES COMMUNITY DEVELOPMENT DISTRICT DESIGNATING CERTAIN OFFICERS OF THE DISTRICT; AND PROVIDING FOR AN EFFECTIVE DATE

WHEREAS, the Artisan Lake s Community Development District ("**District**") is a local unit of special-purpose government created and existing pursuant to Chapter 190, *Florida Statutes*, being situated entirely within Manatee County, Florida, and

WHEREAS, pursuant to Chapter 190.006, *Florida Statutes*, the Board of Supervisors ("**Board**") shall organize by election of its members as Chairperson and by directing a Secretary, and such other officers as the Board may deem necessary; and

WHEREAS the Board of Supervisors of the Artisan Lake s Community Development District desire to appoint the below recited person(s) to the offices specified.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE ARTISAN LAKES COMMUNITY DEVELOPMENT DISTRICT:

SECTION 1. DESIGNATION OF OFFICERS OF THE DISTRICT. The following persons are appointed to the offices shown.

OFFICE	NAME OF OFFICE HOLDER
CHAIRPERSON	PETER LATESSA
VICE-CHAIRPERSON	TOM CARPENTER
ASSISTANT SECRETARY	DEBORAH REYNOLDS
ASSISTANT SECRETARY	JAYNIE KRISTINE GUILLOU
ASSISTANT SECRETARY	MATT MOORE
SECRETARY & TREASURER	VIVIAN CARVALHO
ASSISTANT SECRETARY & ASSISTANT TREASURER	JAMES P. WARD
ASSISTANT TREASURER	JENNIFER GLASGOW
ASSISTANT SECRETARY	CORI DISSINGER

SECTION 2. SEVERABILITY AND INVALID PROVISIONS. If any one of the covenants, agreements or provisions herein contained shall be held contrary to any express provision of law or contract to the policy of express law, but not expressly prohibited or against public policy, or shall for any reason whatsoever be held invalid, then such covenants, agreements or provisions shall be null and void and shall be deemed separable from the remaining covenants, agreements or provisions and shall in no way effect the validity of the other provisions hereof.

SECTION 3. CONFLICT. That all Sections or parts of Sections of any Resolutions, Agreements, or actions of the Board of Supervisors in conflict are hereby repealed to the extent of such conflict.

SECTION 4. PROVIDING FOR AN EFFECTIVE DATE. This Resolution shall become effective immediately upon passage.

PASSED AND ADOPTED by the Board of Supervisors of the Artisan Lake s Community Development District, Manatee County, Florida, this 3rd day of December, 2026.

ATTEST:

ARTISAN LAKES COMMUNITY DEVELOPMENT DISTRICT

Vivian Carvalho, Secretary

, Chairperson

Minutes 11/5/2026

MINUTES OF MEETING
ARTISAN LAKES
COMMUNITY DEVELOPMENT DISTRICT

The Regular Meeting of the Board of Supervisors of the Artisan Lakes Community Development District was held on Thursday, November 5, 2026, at Esplanade at Artisan Lakes Clubhouse, 4725 Los Robles Court, Palmetto, Florida 34221. It began at 3:30 p.m. and was presided over by Mr. Peter Latessa, Chairperson, and James P. Ward as Secretary.

Present and constituting a quorum:

Peter Latessa	Chairperson
Tom Carpenter	Vice Chairperson
Deborah Reynolds	Assistant Secretary
Jaynie Kristine Guillou	Assistant Secretary
Matthew Moore	Assistant Secretary

Also present were:

Jim Ward	District Manager w/PFM
Racheal Meade	District Manager w/PFM
Vivian Carvalho	Senior District Manager w/PFM
Kirsten Mood	District Counsel
John Simon	District Engineer w/Atwell

Audience:

All residents' names were not included with the minutes. If a resident did not identify themselves or the audio file did not pick up the name, the name was not recorded in these minutes. Portions of these minutes may be transcribed in verbatim.

FIRST ORDER OF BUSINESS **Call to Order/Roll Call**

Mr. Ward called the meeting to order at approximately 3:30 p.m. He reported all Board Members were present and constituting a quorum.

SECOND ORDER OF BUSINESS **Notice of Advertisement**

Notice of Advertisement of Regular Meeting

THIRD ORDER OF BUSINESS **Consideration of Minutes**

September 11, 2026 – Regular Meeting

Mr. Ward asked if there were any additions, corrections, or deletions to the Minutes; hearing none, he called for a motion.

DRAFT

On MOTION made by Tom Carpenter, seconded by Peter Latessa, and with all in favor, the September 11, 2026 Regular Meeting Minutes were approved as corrected.

FOURTH ORDER OF BUSINESS Consideration of Resolution 2027-1

Consideration of Resolution 2027-1, a Resolution of the Board of Supervisors Authorizing the Acceptance of Certain Wetland Tracts; And Addressing Conflicts, Severability, and An Effective Date

Mr. Ward: This is essentially what, for lack of a better term, we call a cleanup resolution. There are a couple of tracts of land that are provided to you in a revised exhibit A, a couple of tracts of land that are in the name of Taylor Morrison that are tracts of land that are anticipated, have always been anticipated, to go to the community development district. So, the two tracts that are identified are the new tracks that are listed in this Resolution. Essentially, they are preserve areas within the district. So, obviously, part of your regulatory permits. The Resolution is a standard form resolution, and the deed itself does nothing more than transfer the properties from Taylor Woodrow to the Artisan Lakes Community Development District. I don't think there's going to be any more of these. I know all of the attorneys have been on a number of calls over the last month trying to find all of these tiny pieces of land that may still be out there. But if something else comes up, you'll see a very similar document with a different exhibit to it. But I think they have caught all of the open items that are, so to speak, out there at this point in time. He asked if there were any questions; hearing none, he called for a motion.

On MOTION made by Matt Moore, seconded by Deborah Reynolds, and with all in favor, Resolution 2027-1 was adopted, and the Chair was authorized to sign.

FIFTH ORDER OF BUSINESS Staff Reports

I. District Attorney

No report.

II. District Engineer

No report.

III. District Manager

a) Meeting Dates for Fiscal Year 2027:
- **NEXT MEETING: Thursday, December 3, 2026, Regular Meeting (Swear in Seats 1, 4, & 5)**

b) Commission on Ethics Required Annual Ethics Training Memorandum
c) Financial Statement for period ending September 30, 2026 (unaudited)

Mr. Ward: Your next meeting is scheduled for December 3rd. Those of you who have been elected, Debbie, Peter, and Matt, just so you know, you become Board Members as of the

third Tuesday of the month as a matter of law. So, even if you weren't sitting on the board, that's when your seat would become effective. At your next meeting, whenever we have that, it might not be December 3, I will use a different oath of office to swear you in just because the statute is a little bit different for Chapter 190, but your terms begin on that date, and you are Board Members as of that date. Whenever your next board meeting is we'll swear you in as the case may be. If you have any questions beforehand give me a call. I don't have to be the one that swears you in. So, if there's some immediate desire to do so, just let me know, and I will tell you how to go through the process to do that. Any notary could swear you in, but I usually do it at a board meeting.

Ms. Jaynie Kristine Guillou: Who is our District Engineer now that Victor has left?

Mr. Ward: Atwell Engineering.

Mr. John Simon: My name is John Simon. I have taken over for Victor.

Ms. Guillou: I have been doing a lot of digging into the permits and may need some assistance.

Mr. Ward: Let's hold on that one for a minute. Just remember to do your ethics training. It's required by the end of this calendar year. There's not much time left. I'm assuming you all have done it by now. It is for your Form 1 that you will file by next July 1.

SIXTH ORDER OF BUSINESS Supervisor's Requests

Mr. Ward asked if there were any Supervisor's requests.

Ms. Guillou: The Master HOA is going to establish a pond wetland committee, and I spent about three weeks putting the charter together, and they'll probably approve it next week. It doesn't mean that you have to listen to anything. It's totally advisory. In other words, just getting information because there's a lot to this, as I've discovered. So, that's coming, and one of the reasons that we talked about before, and I got some solid numbers, was there's a particular grant company that will give us up to $30,000 dollars if we want to do the plans. Now it's $10,000 per HOA, and it's $5,000 in two separate years. Apply for $5,000 dollars one year and apply for $5,000 dollars the next year. It's a matching. In other words, we can either match with perhaps our own labor, or if we hire somebody to do it. What I'm trying to research is everything to make sure we're doing the right thing.

Mr. Ward asked who Ms. Guillou was researching with.

Ms. Guillou: Me and just a couple other people just research stuff. You know, I found a couple people at SWFWMD that I talk to a great deal. I found a couple people in Planning, and a lot of people in Manatee County, and so a lot of people kind of help me out. You know, I have meetings with Michelle Atkinson. She's our contact for the region. And in fact, I was going to ask, on Monday the 16th this gentleman from Stony Brook was gracious enough to let me bring a few people down to view their ponds. He's actually booked for viewing in nature walks at Stony Brook until May, so he's doing an extra day just to get a couple of us started, so if anybody wants to go Monday the 16th, you know have to let me know real quick.

Mr. Latessa: Did you say that the Master Association is looking at their ponds?

Discussion ensued regarding the Master Association not having any ponds; the Master Association not having any authority over the ponds; the Pond Committee being advisory only, the CDD was not obliged to listen to the recommendations made by the Pond Committee; whether the Pond Committee would cause problems between the Master Association and the CDD if the CDD chose not to accept the recommendations made by the Committee; and the Pond Committee being necessary to qualify for the grant money.

Mr. Carpenter: I don't have a problem with the Pond Committee, but the Pond Committee should be from the HOA that it concerns, not the Master, because the Master doesn't have that authority.

Ms. Guillou: We have to have a central location, a central place. We can't have a Pond Committee over here and a Pond Committee over there. That makes no sense.

Mr. Carpenter: You have to, because you have two different authorities.

Discussion continued regarding the Pond Committee; whether the Pond Committee should be organized by the individual HOAs or the Master HOA; and the need for education before moving forward with planting in the ponds.

Ms. Vivian Carvalho: I just want to point out something here, and I think that's great, Kris, that you're doing this outreach in an advisory capacity. Do keep in mind though, as a Board Supervisor representing the District, make sure that in those discussions you're not stating you are a representative of the District. Because if the Board of Supervisors here at Artisan Lakes are not in agreement or has not given that authority as a liaison for you to do that, I just want to make sure that you as an individual constituent living in the community is doing that. And the reason I say that is because of insurance purposes.

Mr. Ward: I'm going to add a couple of things to it. I think it's a particularly dangerous precedent that the governmental agency's elected public officials are trying to be superseded in terms of their authority by some advisory board that you kind of put together, including contacting regulatory agencies that this Board does not know about or had input into, or have decided that that's something that they think should be done. That's this Board's responsibility. I would tell the Artisan Lake City board the same thing. So, I think it is an extraordinarily bad precedent for somebody to go out and try to create what might the regulatory agencies might think is some advisory board in order to do something when it's not their responsibility.

Ms. Guillou: I've made it very clear in that charter in more ways than one we're strictly an informational committee, trying to figure out the right things to do, and we just pass it along.

Mr. Ward: The problem is the right things to do are the decision of this Board, not an advisory committee.

Ms. Guillou: The right thing to do is what Manatee County demands, what SFWMD demands.

Mr. Ward: But that is the responsibility of this Board to manage, not some advisory board that you have put together through the HOA.

DRAFT

Ms. Guillou: It takes a tremendous amount of time, and I don't think anybody here has the amount of time it takes research this stuff. I spend a good 10 to 15 hours a week researching. You guys will never put that amount of time into this.

Mr. Carpenter: Whoa! Okay, just a minute. There's two things I want -- I'm retiring as of December 9th. So, here's the scenario: an advisory board that circles the entire HOA and Artisan Lakes, the HOA for the Master, the HOA for Eaves Bend. What happens is when they start, the communication starts leaking out, saying, "hey, they're proposing to put in plants," or they're proposing this or that, and all of a sudden we've got a lot of confusion going on within the HOAs and within the CDDs. The CDD is responsible for these. If the CDD wants to have an advisory committee for the Artisan Lakes ponds, then that's our responsibility to do that.

Ms. Guillou: But, you decided not to, and it wouldn't include Edge Stone.

Mr. Carpenter: I'm just talking about the committee being totally involved in every pond within the geographical area. The HOA will go, "well, wait a minute, who's going to pay for all this?" Have you not been around the communication that goes on in different forms?

Ms. Guillou: We want to be a source of information about how things work. That's pretty much it.

Mr. Latessa: I think you're inviting infighting within our community, because you're going to ask people who are well intentioned to give their opinion on the status of the ponds, whatever, and if we choose not to follow that, we're the bad guys.

Ms. Guillou: The truth of the matter is, is there's not a lot of leeway in this stuff. A lot of this comes directly from the sources.

Discussion continued regarding potential infighting caused by the Pond Committee; the CDD being responsible for the plants and ponds, not the HOA; and the potential for residents to feel entitled to have an opinion about what was planted around the ponds.

Ms. Kirsten Mood (District Counsel): What I'm hearing is we've got a committee established to do some fact finding, which from a Sunshine Law perspective can sometimes get a little hairy. It sounds like it has not been formed by this District, but is going to present information to this district, and so we're in a little bit of a gray area here, where generally when committees like this are put together and they're fact finding, they don't need to abide by the Sunshine Laws, but in the event that any of their decisions are presented to this Board and narrow the window of options that are open to this Board they are no longer just a fact finding committee. They are helping shape a motion that's made and business that's done, and therefore, all of those meetings need to take place in the sunshine, so that requires them to have minutes, to be publicly noticed, and all that, so that creates an administrative burden there potentially, and of course, you know, again, it's not a project necessarily of the District, but could potentially be perceived that way, and I recommend proceeding with caution from that perspective. And then, second issue: if more than one member of this Board is going to attend a meeting, even if it's just a tour or whatever on the 16th, I'd recommend not having any conversations there, and just being very, very careful about topics of conversation while you're on the tour, and make sure you're not violating the Sunshine Law, not discussing anything that might come in front of this Board for a vote.

Ms. Guillou: Let me go back a little bit. There's a gentleman who runs this particular grant, and he will come out and show you a 20-minute movie, whether you want to do it or you don't want

to do it. And he says it usually goes into two hours' worth of conversation. Aesthetics is really important, but the biggest thing that everybody says is SFWMD is only concerned about flow. They're also concerned about contaminants, and this is wholly scientific based. This is not based on an opinion. So, there's going to be the class that Michelle Atkinson created for Manatee County was, they call it a Florida friendly pond. It was so good that the state took it, and they're splitting it into two different classes: one for the professionals, one for the homeowners. They haven't started that yet. I think I'm now up to 60 courses that I've taken at Manatee County. This information they want it to get out there, and we're just the intermediary to what they want. It's not what we want. It's what they want.

Mr. Latessa: Then why don't they come to this Board and present that to this Board?

Ms. Guillou: Well, they're pretty short staffed. They have come before. We had Dan Golis from SWFMD. We had Michelle Atkinson come here and explain things, and we can do it again.

Mr. Latessa: But that was not a board meeting.

Ms. Guillou: No, but why does she have to come to the Board?

Mr. Latessa: Because the Board is responsible.

Discussion ensued regarding the Board being the entity responsible for the ponds; and the information should be presented to the CDD Board, not the HOA, not the Committee.

Mr. Ward: The other issue is to the extent that you've been a part of the creation of this advisory committee, as you mentioned, and you wrote the charter, so to speak. I think you put yourself in place as someone of authority to do something on behalf of a CDD, which you don't have the right to do. Your authority for writing a charter as a member of a board for an advisory committee you're going to sit on -- Clearly, I think you extended your authority as a member of the board by doing something like that.

Ms. Guillou: So, my private rights as a private citizen are all usurped because I'm on this board?

Mr. Ward: To a great extent, yes, it is. As a public official, you have certain duties and rights and obligations that you must abide by. One of them is not helping create advisory committees outside of the context of a Board that you're going to be a part of to look at facilities that are owned by the entity that you are a member of the Board on. I'm sorry, you seem to be way off base here.

Ms. Guillou: I'll consider resigning then. Let me think that over.

Mr. Ward: I mean, this is way outside of your authority.

Ms. Guillou: Well, you guys didn't want to have it underneath you guys because it would have been too restrictive. I mean, we talked about it.

Mr. Ward: That's not the point.

Ms. Guillou: Okay, you were talking about a fall inspection, an inspection of the ponds and the wetlands, I believe in the fall. That was not a civil engineer inspection, was it?

DRAFT

Mr. Ward: So, for the benefit of the balance of the Board Members, Kris had called me outside of a Board Meeting and asked me how the District operates in terms of inspections of the water management system. Specifically, the question was the inspection of the drainage pipes themselves. I indicated to her at that time that essentially in the fall, sometime so to speak, pre-rainy season, we do usually have a vendor who comes out and does a video inspection of the pipe within the community to see how much it's clogged up. Then we come up with a report, and then we come up with a plan on cleaning all of that up.

Ms. Guillou: So, it's just like one of those companies will do the inspection and does the work, or you have a separate inspector and a separate company that actually does the work.

Mr. Ward: The asset manager will retain a vendor to do that inspection because there's a lot of equipment that goes with that video or report or whatever. It goes back to the asset manager and then he makes a determination of what to do with that.

Ms. Guillou: Okay, so it's not a civil engineer that's doing that.

Discussion ensued regarding the inspection of the pipes being currently underway.

Ms. Guillou: I thought that I heard that Diane was going to send over the infractions of the backyards of the people putting plants into the wetlands. Did she send the list over?

Mr. Ward: She sent me an email. Correct.

Ms. Guillou: I've done a little research. There are mandatory permits, and then there's Manatee County best practice. So, the mandatory signs would be in the permits, and they would be few and far between, but there should be a few. It's actually when the pond meets a wetland. So, they're in the permits somewhere. There's two different options that the Manatee County supports. Again, it's trying to decipher mandatory from best practice. One of them I thought was a little overkill, and I think it'd be very expensive, and that was to put a sign in the backyard of everybody who's within 15 feet of the buffer. The other one, which seems to be much more popular, is actually putting the signs around each wetland, and you're supposed to be able to see that sign. West Coast actually did a schematic on that, and he'd come up with I think 50 locations to do that, as opposed to putting them in the backyards. Is that something you guys want to contract to talk about or get done?

Mr. Ward: I already authorized 50 signs to go into the preserves within the context of our existing budget to meet the requirements of the regulatory program. We're not going to do 250 or 300.

Mr. Carpenter: They are already in some of the yards. I've got one in my yard.

Ms. Guillou: These are best practices by Manatee, but it's probably a smart thing to do.

Mr. Carpenter: The people that have decided to take out embankments and plant their own plants on the ponds, how are we going to address that? I mean from Matt's backyard, it looks awful.

Mr. Ward: What did they do?

Mr. Carpenter: They tore out the embankment. Just cut it out and planted plants.

Discussion ensued regarding the residents who planted plants in unauthorized areas; a resident who tore up the lake bank; and what the CDD might potentially do about the situation.

Ms. Guillou: Well, here's the problem too: they got a letter from Taylor Morrison that said they were allowed to do that.

Mr. Carpenter: That's irrelevant at this point.

Ms. Guillou: What are you going to do about it, send letters?

Mr. Ward: We are not going to send letters. We'll have to evaluate how many it is, what the cost of it is to do it, and come up with a solution to it. I'm going to tell you that's not budgeted for. There's like 69 or 70 locations. That's a lot of work. So, I'll have to figure out something.

Mr. Carpenter: We don't have that many locations where they've intruded into the pond, do we? Well, the wetlands, but the ponds are more of a concern because of the erosion.

Mr. Ward: Right, that's going to erode the ponds. What we would normally do on the lake bank when somebody does that, we would just go back in, fix the lake bank, and knock on the door of the owner and say, "Look, you can't do that," and be done with it.

Mr. Carpenter: So, we would incur the cost to fix it?

Mr. Ward: It's the District's lake bank, so we would kind of go in. It's more expensive to try to get them to pay for it than to just fix it and be done with it and get this lake bank fixed before rainy season. So, we will probably go ahead and do that. And since we're new with this, normally, if I had a contact with the HOA – in some of my communities, I can send a letter to the HOA manager and say, "Can you mail out this email to the entire community?" And it's something that comes directly from me as the manager of the CDD that says, "Hey, please, don't do this" or "here's something good to know." But we are literally two months into this at this point. So, if that's available within your HOA, we could do something like that too. But I don't want to do that just yet. Let's do step one.

Ms. Guillou: Yeah, and I guess it would be us that would be fined on those intrusions into the wetlands. They are as important as the ponds.

Mr. Ward: I understand.

Mr. Carpenter: Let's go back to the ponds and drainage. There are grates around the ponds for drainage that comes from between the houses that somehow got covered over with sod. The reason I bring this up is that when our contractor goes around looking, we need to make sure we identify these.

Mr. Ward: I'm impressed the drains are there. In some communities they don't exist. I've got one District right now that has a multi-million-dollar program going on to fix lake banks because the grates not there. So, we'll go clean it. That's actually really good that they're there.

Mr. Carpenter: And then this was some of the embankment stuff that was going on. So, what happens? I just want to make sure that the Board knows that the drainage going between the two houses either was not graded correctly, or this grate is covered up and is screwing things

up, or it's full of dirt. What Taylor Morrison was supposed to do, was come down from the foundation like this and make sure that the gravity and flow of the water went correctly. So, as long as we are working on this and making sure that our guys doing things, amen.

Ms. Guillou: And that's where some of the erosion is coming in because that water between the houses comes off the roofs, especially when the ponds are low, it starts to put that dirt into the pond, and they mathematically calculate the water. So, when they it's time to be dredged, we won't have a say in it. If it's not holding the correct amount of water, they're going to dredge it and we're going to pay for it. That's some of the reasons, a lot of the reasons, why we might want to consider some plants. And I'm not totally convinced. We have to decide which pond is in the worst shape, and you know, there's all sorts of decisions made before you do anything. It takes a year to figure out which first – I mean, if we're only talking $30,000 dollars there might be one pond in each of the HOAs, but there will be experts that will be out here and explaining this.

Ms. Reynolds: Just as an FYI, when I was on the landscape committee, we tried to find those grates. We had a team that walked around from house to house and tried to find them. I just think a lot of people don't even realize the grates are there. We have to clean ours all the time. But you're right; they are difficult to find.

Mr. John Simon: Typically, the lots are graded with the high point between the homes somewhere at the middle of the house if there's a pond behind it, so we don't typically have a grate between the houses. So, I'll take a look at the plan and see if there's any on this project. But that's not that's not very typical.

Mr. Carpenter: Typically, what I see behind these houses the big metal grates are to the back corner.

Mr. Simon: Correct. If there isn't a pond directly behind the home, you'll see some of those smaller yard drains. But if there's a pond, we typically want to send the water directly to the pond without having to catch it and convey it via pipe. So, I'll take another look at the plan and see if we have any atypical grating like described. I didn't see the picture, but I'll take another look.

Mr. Latesa: The other thing that I want to bring to the Board is the pond and the banks are our issue as a CDD. The drainage between the houses is not a CDD issue.

Mr. Carpenter: That's correct because that can be affected by pool installation and everything.

Mr. Latessa: I just want to make sure we said that on the record because I don't want the residents coming back going well you fixed that grate how come you're not fixing our yard. We're responsible for the grate but not the yard.

Ms. Guillou: I don't know if you guys ever read your book, your present that I gave you, but there was a page about certain drains. There are some gutters that come down and they have holes in it, and it seems to be directed towards those that are on a pond because it disperses the water more than taking that channel. That's why we get all these degradations on our banks. I'm not suggesting, I'm just saying that maybe it's something we might want to do some experiments with and see if it actually reduces it. I mean, it's something to look at. Read your book. Next, I know I've mentioned this before, but now that you guys are getting in the real world and taking responsibility. Are you familiar with the no-mow zone?

Mr. Ward: Yes, the no-mow zone is –

Ms. Guillou: It's a really, really, big deal, and it's not that difficult, but it needs to be addressed. They're suggesting 10 feet of no-mow zone along the highest portion of a pond, but the 10 feet it gets a little confusing. The 10 feet actually means no fertilizer within those 10 feet. The actual no-mow zone is designed close to the bank so that grass cuttings don't fly down in there. It will keep some of it. It's mostly the grass cuttings because that's nitrogen and phosphorus, but it also keeps some of the fertilizer from going in there. Now they even have this in the book. When you figure out what you're doing, they'll have a suggestion of a 30 inch no-mow zone. Again, it's 10 feet no fertilizer, and maybe a five foot no-mow zone. And what they actually do, and people are doing this all over. The standard seems to be about a six foot of the no-mow zone, and then you've got the 10 foot no fertilizer zone. How they do it is they trim – it is a cost issue for the landscapers because they have to hand trim with a hand trimmer that every once in a while because you don't want the grass getting all this high. You want to keep it about this high. It needs to be addressed. I'm embarrassed of our ponds. In fact, I got a call from somebody from Eaves Bend the other day, and they said they knew I was working on this stuff, and they said I just watched the landscaper, and they were mowing the grass, putting clippings right into the pond.

Mr. Ward: The issue is you have no legal authority to do that because those areas are outside of property owned or controlled by CDD, and as a result of that, the CDD has no authority whatsoever to implement any kind of a plan to that extent.

Ms. Guillou: Don't we own that property?

Mr. Latessa: No. We have an access easement.

Mr. Carpenter: So, when we say we own the banks, what constitutes the bank? Is that the beginning of the slope toward the water?

Mr. Ward: We have a responsibility to maintain the bank up to the top of the bank. We usually we have an easement for the top of it. Our maintenance responsibility is to restore it for purposes of any washouts or erosion that occurs in it. Our responsibility is not to maintain it. You start maintaining a lake bank on a regular basis for purposes of mowing, you can take your budget and probably add a couple more zeros to the end of it, and then you can figure out the maintenance cost. A CDD doesn't have the responsibility to maintain the mowing of the lake bank because generally, to some extent, the property is owned by the adjoining property owner or an HOA down to what we call control, which is more than 50% of the way down the lake bank. So, we don't maintain it unless there are washouts or damages, then you might see to a lake bank. But mowing lake banks on a regular basis is not something CDDs can really do.

Mr. Latessa: I think when we find out about information like this, I think there should be a communication back to the HOA because the contract for landscape mowing is with the HOA and not the CDD. I'm just bringing this up, that at some point, I feel like someone from the HOA should attend our meeting, so that communication in a professional way and in a way that "oh, okay, I was at the CDD board meeting and they talked about this and so we could be in trouble if we don't have our new landscape people do this." I'm just using that as an example. No different than Tom and I and Debbie and you who have been going to the HOA meetings and at least listening to what comments and what is going on at the HOA meeting to bring back here. So, because things like this here were brought to my attention at the HOA meeting, which is

good, but my comment was I have to take that to the Board, and the Board has to see that, and the Board has to talk about it, and the Board has to vote on it. We probably want to invite, and if it's up to me to do that, I will, but I would like to see someone from the HOA board who can communicate on a regular basis to them. And I don't think it has to be Tom.

Discussion ensued regarding potential HOA members who could attend CDD meetings; and inviting HOA members to attend CDD meetings for better communication purposes.

Mr. Ward: From a realistic perspective, that particular issue is clearly something that's a recommended procedure. It's not a requirement, and that's the difference right there. And I'm going to tell you before we start stepping on HOA toes and telling them that they might want to do something. You need to be careful with that.

Mr. Latessa: I mean, best practice is you reverse mow, so you mow with your exhaust always away from the pond. That's best practices for all these landscape companies. Sometimes they get a little sloppy. I've seen them mowing right in the morning

Mr. Ward: We need to be a little careful about what we say. And don't get me wrong, I love that book. I mean, I read it. It's a bible for me. I read it a lot. I've seen it for years. I've used it in projects. But sometimes you just don't need to go there.

Discussion continued about the best way to mow or weed around the ponds.

Mr. Latessa: And all I'm suggesting is, on the communication, so we don't violate the Sunshine Law, is that if there's an HOA person sitting there, they were part of the public communication, and that conversation is, this is a suggestion, however you want to put it, so that if it doesn't happen, and a resident goes, well, the ponds are the CDD's, let's go after the CDD.

Mr. Ward: I think you need to be careful. The Healthy Ponds Guide is a guide. It's not the law.

Ms. Guillou: In my in my experience, most landscaping companies in Florida have to adhere to these minimal guidelines for their own licensing.

Discussion continued regarding the Health Ponds Guide being a guide only; mowing around the ponds; the CDD "staying in its own lane" when it came to mowing around the ponds.

Ms. Guillou: How much money do we have in our reserves?

Mr. Ward: In this district, you have none. I mean, you never have reserves. You barely have $100,000 in cash in this district and that's not reserves. That lets us operate October, November, December. We've never done anything. This is the first year we've even operated this District.

Mr. Latessa: Going forward, there will be. Because it's in the budget, like $50,000 dollars.

Mr. Ward: I think I added $50,000 dollars, so our total cash balance as of the end of September of next year will be $340,000 dollars. That's it. That's not reserves. That's just operating. That's estimated, assuming we don't go over budget on any line item, which is a real high wish list for a District that's just getting started on operations. Especially since I now know about lake banks that I didn't know before we did the budget.

Mr. Latessa: Where do we stand on the merger of the two CDDs? Is that just completely off the table for a while?

Mr. Ward: It's off the table until both Districts transition. So, the Artisan Lake East transitions at the same time, which is all the third week of November. Christmas is a terrible time to have that debate. I think we'll put it in January and that'll be a good one. I will probably be totally gone by then anyway.

Ms. Carvalho: I just want to make sure that everybody's aware that Jim will not be gone in January. He'll be there by me, by my side.

Mr. Ward asked if there were any additional Supervisor comments; there were none.

SEVENTH ORDER OF BUSINESS Public Comments

Mr. Ward asked if there were any public comments; there were none.

EIGHTH ORDER OF BUSINESS Adjournment

Mr. Ward adjourned the meeting at approximately 4:25 p.m.

On MOTION made by Peter Latessa, seconded by Matthew Moore, and with all in favor, the meeting was adjourned.

Artisan Lakes Community Development District

_____ _____

James P. Ward, Secretary Peter Latessa, Chairperson

DRAFT

Resolution 2027-3

RESOLUTION 2027-3

A RESOLUTION DESIGNATING THE REGISTERED AGENT; DESIGNATING THE OFFICE AND LOCATION OF THE REGISTERED OFFICE; AND PROVIDING FOR CONFLICTS AND INVALID PROVISIONS AND PROVIDING FOR AN EFFECTIVE DATE.

RECITALS

WHEREAS, Artisan Lakes Community Development District ("**District**") is a local unit of special-purpose government created and existing pursuant to Chapter 190, *Florida Statutes*, being situated entirely within Manatee County, Florida; and

WHEREAS, the District is statutorily required to designate a registered agent and a registered office location for the purposes of accepting any process, notice, or demand required or permitting by law to be served upon the District in accordance with Section 189.014(1), *Florida Statutes*; and

WHEREAS, the Board of Supervisors of the Artisan Lakes Community Development District desire to appoint Vivian Carvalho as the Registered Agent and designate the offices of PFM Management Services LLC, 3501 Quadrangle Blvd., Suite 270, Orlando, FL 32817, as the Registered Office.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE ARTISAN LAKES COMMUNITY DEVELOPMENT DISTRICT:

SECTION 1. DESIGNATION OF REGISTERED AGENT: Vivian Carvalho is hereby appointed as the Registered Agent.

SECTION 2. DESIGNATION OF REGISTERED OFFICE. The offices of PFM Management Services LLC, 3501 Quadrangle Blvd., Suite 270, Orlando, FL 32817, is hereby designated as the Registered Office.

SECTION 3. SEVERABILITY AND INVALID PROVISIONS. If any one of the covenants, agreements or provisions herein contained shall be held contrary to any express provision of law or contract to the policy of express law, but not expressly prohibited or against public policy, or shall for any reason whatsoever be held invalid, then such covenants, agreements or provisions shall be null and void and shall be deemed separable from the remaining covenants, agreements or provisions and shall in no way effect the validity of the other provisions hereof.

SECTION 4. CONFLICT: That all Sections or parts of Sections of any Resolutions, Agreements, or actions of the Board of Supervisors in conflict are hereby repealed to the extent of such conflict.

SECTION 5. PROVIDING FOR AN EFFECTIVE DATE. This Resolution shall become effective immediately upon passage.

PASSED AND ADOPTED by the Board of Supervisors of the Artisan Lakes Community Development District, Manatee County, Florida, this 3rd day of December, 2026.

ATTEST:	**ARTISAN LAKES COMMUNITY DEVELOPMENT DISTRICT**
Vivian Carvalho, Secretary	, Chairperson

Resolution 2027-4

RESOLUTION 2027-4

A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE ARTISAN LAKES COMMUNITY DEVELOPMENT DISTRICT ADOPTING GOALS, OBJECTIVES, AND PERFORMANCE MEASURES AND STANDARDS FOR FISCAL YEAR 2027; PROVIDING A SEVERABILITY CLAUSE; AND PROVIDING AN EFFECTIVE DATE.

WHEREAS, the Artisan Lakes Community Development District (the "District") is a local unit of special-purpose government created and existing pursuant to Chapter 190, *Florida Statutes*; and

WHEREAS, effective July 1, 2024, the Florida Legislature adopted House Bill 7013, codified as Chapter 2024-136, Laws of Florida ("HB 7013") and creating Section 189.0694, Florida Statutes; and

WHEREAS, pursuant to HB 7013 and Section 189.0694, Florida Statutes, beginning October 1, 2025, the District shall establish goals and objectives for the District and create performance measures and standards to evaluate the District's achievement of those goals and objectives; and

WHEREAS, the District Manager has prepared the attached goals, objectives, and performance measures and standards and presented them to the Board of the District; and

WHEREAS, the District's Board of Supervisors ("Board") finds that it is in the best interests of the District to adopt by resolution the attached goals, objectives and performance measures and standards.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE ARTISAN LAKES COMMUNITY DEVELOPMENT DISTRICT:

SECTION 1. The recitals so stated are true and correct and by this reference are incorporated into and form a material part of this Resolution.

SECTION 2. The District Board of Supervisors hereby adopts the goals, objectives and performance measures and standards as provided in **Exhibit A.** The District Manager shall take all actions to comply with Section 189.0694, Florida Statutes, and shall prepare and publish on the District's website, on or before December 1 of each year, an annual report describing (a) the goals and objectives achieved by the District and the performance measures and standards used to make that determination, and (b) any goals or objectives the District failed to achieve, for consideration by the Board of the District.

SECTION 3. If any provision of this Resolution is held to be illegal or invalid, the other provisions shall remain in full force and effect.

SECTION 4. This Resolution shall become effective upon its passage and shall remain in effect unless rescinded or repealed.

PASSED AND ADOPTED by the Board of Supervisors of the Artisan Lakes Community Development District, Manatee County, Florida, this 3rd day of December, 2026.

ATTEST:	**ARTISAN LAKES COMMUNITY DEVELOPMENT DISTRICT**
Vivian Carvalho, Secretary	, Chairperson

Exhibit A: Fiscal Year 2027 Performance Measures/Standards and Annual Reporting

Exhibit A

3501 Quadrangle Boulevard, Suite 270
Orlando, Florida 32817
407.723.5900 | pfmmanagement.com

Artisan Lakes Community Development District

James P. Ward, District Manager
wardj@pfm.com
Phone: (954) 658-4900

Vivian Carvalho, District Manager
carvalhov@pfm.com
Phone: (407) 723-5945

To: Board of Supervisors

From: District Manager

RE: 2024 Florida Statutes (including 2025C)
Section 189.0694 Special Districts; Performance Measures and Standards

---

Beginning October 1, 2024, or by the end of the first full fiscal year after its creation, whichever is later, each special district must establish goals and objectives for each program and activity undertaken by the district, as well as performance measures and standards to determine if the district's goals and objectives are being achieved. Additionally, by December 1 of each year thereafter, each special district must publish an annual report on the district's website describing: (a) The goals and objectives achieved by the district, as well as the performance measures and standards used by the district to make this determination; and (b) Any goals or objectives the district failed to achieve.

District Management has identified the following key categories to focus on for Fiscal Year 2027 and develop statutorily compliant goals for each:

- Community Communication and Engagement
- Financial Transparency and Accountability

Additionally, special districts must provide an annual reporting form to share with the public that reflects whether the goals & objectives were met for the year. District Management has streamlined these requirements into a single document that meets both the statutory requirements for goal/objective setting and annual reporting.

The proposed goals/objectives and the annual reporting form are attached hereto as **Exhibit A** to this memo. District Management recommends that the Board of Supervisors adopt these goals and objectives to maintain compliance and further enhance their commitment to the accountability and transparency of the District.

Exhibit A

ARTISAN LAKES COMMUNITY DEVELOPMENT DISTRICT
Performance Measures/Standards & Annual Reporting Form
October 1, 2026 – September 30, 2027

1. COMMUNITY COMMUNICATION AND ENGAGEMENT

Goal 1.1 Public Meetings Compliance

Objective: Hold at least two (2) regular Board of Supervisor meetings per year to conduct CDD related business and discuss community needs.

Measurement: Number of public board meetings held annually as evidenced by meeting minutes and legal advertisements.

Standard: A minimum of two (2) regular board meetings was held during the fiscal year.

Achieved: Yes ☐ No ☐

Goal 1.2 Notice of Meetings Compliance

Objective: Provide public notice of each meeting at least seven days in advance, as specified in Section 190.007(1), using at least two communication methods.

Measurement: Timeliness and method of meeting notices as evidenced by posting to CDD website, publishing in local newspaper and via electronic communication.

Standard: 100% of meetings were advertised with 7 days' notice per statute on at least two mediums (i.e., newspaper, CDD website, electronic communications).

Achieved: Yes ☐ No ☐

Goal 1.3 Access to Records Compliance

Objective: Ensure that meeting minutes and other public records are readily available and easily accessible to the public by completing monthly CDD website checks.

Measurement: Monthly website reviews will be completed to ensure meeting minutes, and other public records are up to date as evidenced by District Management's records.

Standard: 100% of monthly website checks were completed by District Management.

Achieved: Yes ☐ No ☐

2. FINANCIAL TRANSPARENCY AND ACCOUNTABILITY

Goal 2.1 Annual Budget Preparation

Objective: Prepare and approve the annual proposed budget by June 15 and final budget was adopted by September 30 each year.

Measurement: Proposed budget was approved by the Board before June 15 and final budget was adopted by September 30 as evidenced by meeting minutes and budget documents listed on CDD website and/or within district records.

Standard: 100% of budget approval and adoption were completed by the statutory deadlines and posted to the CDD website.

Achieved: Yes ☐ No ☐

Goal 2.2 Financial Reports

Objective: Publish to the CDD website the most recent versions of the following documents: annual audit, current fiscal year budget with any amendments, and most recent financials within the latest agenda package.

Measurement: Annual audit, previous years' budgets, and financials are accessible to the public as evidenced by corresponding documents on the CDD website.

Standard: CDD website contains 100% of the following information: most recent annual audit, most recently adopted/amended fiscal year budget, and most recent agenda package with updated financials.

Achieved: Yes ☐ No ☐

Goal 2.3 Annual Financial Audit

Objective: Conduct an annual independent financial audit per statutory requirements and publish the results to the CDD website for public inspection and transmit said results to the State of Florida.

Measurement: Timeliness of audit completion and publication as evidenced by meeting minutes showing board approval and annual audit is available on the CDD website and transmitted to the State of Florida.

Standard: Audit was completed by an independent auditing firm per statutory requirements and results were posted to the CDD website and transmitted to the State of Florida.

Achieved: Yes ☐ No ☐

James P. Ward, District Manager	_____, Chairman
Date	Date

Commission on Ethics Required Annual Ethics Training Memorandum

3501 Quadrangle Boulevard, Suite 270
Orlando, Florida 32817
954.658.4900 | pfmmanagement.com
James P. Ward, District Manager

Community Development District Memo

To: **Board of Supervisors**
From: **James P. Ward**
Date: **October 19, 2026**
Re: **Commission on Ethics Electronic Financial Disclosure Management System (EFDMS), Financial Disclosure Forms and Required Ethics Training**

Ethics Training Requirements:

Pursuant to Section 112.3142, *Florida Statutes*, all Supervisors of a Community Development District organized and existing under the Uniform Community Development District Act of 1980, Chapter 190, *Florida Statutes*, are required to complete four (4) hours of ethics training each calendar year. The four (4) hours of Ethics Training shall be allocated amongst the following categories:

- two (2) hours of ethics law,
- one (1) hour of Sunshine Law; and
- one (1) hour of Public Records law

Supervisors will report their 2026 training when they fill out their Form 1 (Statements of Financial Interests) for the year 2027 by checking a box confirming that they have completed the annual Ethics Training.

Please note that the four (4) hours of the Ethics Training do not have to be completed all at once. *ETHICS TRAINING IS REQUIRED TO BE COMPLETED BY DECEMBER 31, 2026 FOR THE FORM 1 THAT IS FILED IN 2027*.

It is highly recommended that you keep a record of all ethics training used to satisfy the Ethics Training requirements. At present, there is no need to submit a certificate or letter of completion of Ethics Training. However, the Florida Commission on Ethics ("COE") advises that Supervisors maintain a record in the event they are asked to provide proof of completion of all Ethics Training.

Additionally, you may be solicited by a private organization (Florida Association of Special Districts) – to take their Ethics Training Course on their platform for which there is a fee. **You are NOT required to use their services nor pay the fees they charge.** There are several free online resources and links to resources that Supervisors might find helpful, including free training for the two (2) hour ethics portion and links to outside training(s) which can be used to satisfy the other categories of the Ethics Training. **You may take training from any source you choose**.

General Resource: Florida Commission on Ethics – Training – Ethics (state.fl.us)

1. **Free Training Programs:**

Ethics law – The COE provides several free training videos (audio/visual or audio only) covering specific ethics law topics. Please note that two (hours" in the category of ethics law are required annually. Pursuant to CEO 13-15, "hours" may be measured in fifty (50) minute increments so you should ensure you satisfactorily complete sufficient programs to satisfy the two-hour ethics requirement if choosing a combination of training videos listed below.

a. **State Ethics Laws for Constitutional Officers & Elected Municipal Officers:**
Note: Google Chrome web browser will not open – use another web browser.
Video Tutorial

b. **Office of the Attorney General offers training on Sunshine Law and Public Records Law (22-page presentation – no audio):**
23-page presentation – no audio

c. **Office of the Attorney General 2-hour Audio-only Presentation regarding Public Meetings and Public Records Law:**
Audio presentation – no video

d. **The Florida League of Cities** offers a free four-hour online course which satisfies the annual requirement to attend two hours of ethics law, one hour of Sunshine law, and one hour of Public Records law. The course is available online 24/7 and may be paused and resumed at your convenience. Registration is required for this class; however, there is no registration fee.
Florida League of Cities Website

FLC Future Ethics Workshop Dates:
12/16/2026: 10 am – 3:30 pm

2. Other Training Programs

a. **Florida State University's Florida Institute of Government** offers a "4-Hour Ethics Course" which satisfies the annual requirement to attend two hours of ethics law, one hour of Sunshine law, and one hour of Public Records law. The course is available online 24/7 and may be paused and resumed at your convenience. The registration fee is $79.00.
- 4-Hour Ethics Course

b. **Florida Ethics Institute (FEI)** offers a 4-hour Florida Ethics & Open Government Master Class which satisfies the state's annual ethics training requirement mandated by the Code of Ethics for Public Officers and Employees and applicable to elected municipal officers, constitution officers, and others. In accordance with the legal mandate the training consists of two hours of Ethics Law (covering Florida's ethics laws and Art. II, s. 8, Fla. Const.), one hour of Sunshine Law (Ch. 286, F.S.), and one hour of Public Records Law (Ch. 119, F.S.) education. The cost is $75.00

- Home - Florida Ethics Institute

District Financials

Artisan Lakes
Community Development District

October 2026 Financial Package

October 31, 2026

PFM Management Services LLC
3501 Quadrangle Boulevard
Suite 270
Orlando, FL 32817-8329
(407) 723-5900

TABLE OF CONTENTS

Artisan Lakes Community Development District

Monthly Financial Statements

Balance Sheet – All Funds	1-2
Statement of Revenue, Expenditures and Changes in Fund Balance	
General Fund	3-4
Debt Service Fund	
Series 2013	5
Series 2018	6
Income & Expense Graph – All Funds	7

Artisan Lakes Community Development District
Balance Sheet
Through October 31, 2026

	Governmental Funds			Account Groups		Totals (Memorandum Only)
	General Fund	Debt Service Funds				
		Series 2013	Series 2018	General Long Term Debt	General Fixed Assets	
Assets						
Cash and Investments						
General Fund						
Checking Account - Truist Bank	$ 57,560	$ -	$ -	$ -	$ -	$ 57,560
Investment Account - FMIT	$ 201,217					$ 201,217
Debt Service Fund						
Reserve Account						
Series 2013 A-1	-	261,631	-	-	-	261,631
Series 2013 A-3	-	103,625	-	-	-	103,625
Series 2018	-	-	134,430	-	-	134,430
Revenue						
Series 2013 A-1	-	438,324	-	-	-	438,324
Series 2013 A-3	-	63,368	-	-	-	63,368
Series 2018	-	-	389,203	-	-	389,203
Prepayment Account						
Series 2013 A-1	-	369	-	-	-	369
Series 2013 A-3	-	-	-	-	-	-
Series 2018	-	-	1,401	-	-	1,401
Accounts Receivable	-	-	-	-	-	-
Due from Other Funds						
General Fund	-	1,499	1,926	-	-	3,424
Debt Service Fund(s)	-	-	-	-	-	-
Amount Available in Debt Service Funds	-	-	-	1,395,775	-	1,395,775
Amount to be Provided by Debt Service Funds	-	-	-	8,094,225	-	8,094,225
Investment in General Fixed Assets (net of depreciation)	-	-	-	-	2,721,551	2,721,551
Total Assets	**$ 258,777**	**$ 868,815**	**$ 526,960**	**$ 9,490,000**	**$ 2,721,551**	**$ 13,866,104**

Prepared by:
PFM Management Services LLC

Artisan Lakes Community Development District
Balance Sheet
Through October 31, 2026

	Governmental Funds			Account Groups		Totals (Memorandum Only)
	General Fund	Debt Service Funds				
		Series 2013	Series 2018	General Long Term Debt	General Fixed Assets	
Liabilities						
Accounts Payable	$ 1,427	$ -	$ -	$ -	$ -	$ 1,427
Due to Other Funds						
General Fund	-	-	-	-	-	-
Debt Service Fund(s)	3,424	-	-	-	-	3,424
Bonds Payable						
Current Portion (Due Within 12 Months)						
Series 2013 A-1	-	-	-	75,000	-	75,000
Series 2013 A-3	-	-	-	25,000	-	25,000
Series 2018	-	-	-	135,000	-	135,000
Long Term						
Series 2013 A-1	-	-	-	$2,590,000	-	2,590,000
Series 2013 A-3	-	-	-	$960,000	-	960,000
Series 2018	-	-	-	5,705,000	-	5,705,000
Total Liabilities	**$ 4,851**	**$ -**	**$ -**	**$ 9,490,000**	**$ -**	**$ 9,494,851**
Fund Equity and Other Credits						
Investment in General Fixed Assets	-	-	-	-	2,721,551	2,721,551
Fund Balance						
Restricted						
Beginning: October 1, 2025 (Unaudited)	-	864,939	523,530	-	-	1,388,469
Results from Current Operations	-	3,876	3,430	-	-	7,306
Unassigned						
Beginning: October 1, 2025 (Unaudited)	262,891	-	-	-	-	262,891
Changes to Extraordinary Capital/Ops Reserve	4,167	-	-	-	-	4,167
Results from Current Operations	(13,132)	-	-	-	-	(13,132)
Total Fund Equity and Other Credits	**$ 253,926**	**$ 868,815**	**$ 526,960**	**$ -**	**$ 2,721,551**	**$ 4,371,252**
Total Liabilities, Fund Equity and Other Credits	**$ 258,777**	**$ 868,815**	**$ 526,960**	**$ 9,490,000**	**$ 2,721,551**	**$ 13,866,104**

Artisan Lakes Community Development District
General Fund
Statement of Revenues, Expenditures and Changes in Fund Balance
Through October 31, 2026

Description	October	Year to Date	Total Annual Budget	% of Budget
Revenue and Other Sources				
Interest				
Interest - Florida Municipal Investment Trust	1,062	1,062	-	0%
Special Assessment Revenue				
Special Assessments - On-Roll	1,530	1,530	395,234	0%
Other Fees and Charges				
Discounts/Collection Fees	-	-	(25,856)	7%
Total Revenue and Other Sources:	**$ 2,592**	**$ 2,592**	**$ 369,378**	**1%**
Expenditures and Other Uses				
Legislative				
Board of Supervisor's Fees	-	-	4,000	0%
Executive				
Professional Management	2,667	2,667	32,000	8%
Financial and Administrative				
Audit Services	-	-	5,600	0%
Accounting Services	833	833	10,000	8%
Assessment Roll Services	833	833	10,000	8%
Arbitrage Rebate Services	-	-	1,000	0%
Other Contractual Services				
Legal Advertising	-	-	2,100	0%
Trustee Services	-	-	10,200	0%
Dissemination Agent Services	-	-	6,000	0%
Amortization Schedules	-	-	600	0%
Bank Service Fees	-	-	250	0%
Communications & Freight Services				
Postage, Freight & Messenger	-	-	300	0%
Computer Services - Website Development	-	-	2,400	0%
Insurance	7,224	7,224	7,193	100%
Printing & Binding	-	-	700	0%
Subscription & Memberships	-	-	175	0%
Legal Services				
General Counsel	-	-	7,000	0%
Other General Government Services				
Engineering Services	-	-	3,500	0%

Artisan Lakes Community Development District
General Fund
Statement of Revenues, Expenditures and Changes in Fund Balance
Through October 31, 2026

Description	October	Year to Date	Total Annual Budget	% of Budget
Other Physical Environment				
Lake, Lake Bank and Littoral Shelf Maintenance				
Professional - Management	-	-	21,500	
Repairs and Maintenance				
Aquatic Weed Control	-	-	45,600	0%
Lake Bank Maintenance	-	-	40,000	0%
Littoral Shelf Plantings	-	-	32,000	0%
Midge Fly Control	-	-	8,000	0%
Drainage Inspections/Cleaning	-	-	27,000	0%
Contingencies	-	-	15,260	0%
Preserve Services				
Professional - Management	-	-	2,000	
Repairs and Maintenance				
Wetland/Preserve Maintenance	-	-	25,000	0%
Reserves				
Extraordinary Capital/Operation	4,167	4,167	50,000	8%
Total Expenditures and Other Uses:	**$ 15,724**	**$ 15,724**	**$ 369,378**	**4%**
Net Increase/ (Decrease) in Fund Balance	(13,132)	(13,132)	-	
Fund Balance - Beginning	262,891	262,891	262,891	
Extraordinary Capital Operations Reserve	4,167	4,167	50,000	
Fund Additions/(Expenditures)	-	-	-	
Fund Balance - Ending	**$ 253,926**	**$ 253,926**	**$ 312,891**	

Artisan Lakes Community Development District
Debt Service Fund - Series 2013
Statement of Revenues, Expenditures and Changes in Fund Balance
Through October 31, 2026

Description	October	Year to Date	Total Annual Budget	% of Budget
Revenue and Other Sources				
Carryforward	$ -	$ -	$ -	0%
Interest Income	2,378	2,378	83,652	3%
Special Assessment Revenue				
Special Assessments - On-Roll				
Series 2013 Bonds A-1	1,082	1,082	280,840	0%
Series 2013 Bonds A-3	417	417	108,257	0%
Other Fees and Charges				
Discounts for Early Payment	-	-	(27,237)	0%
Total Revenue and Other Sources:	**$ 3,876**	**$ 3,876**	**$ 445,512**	**1%**
Expenditures and Other Uses				
Debt Service				
Principal Debt Service - Mandatory				
Series 2013 Bonds A-1	-	-	75,000	0%
Series 2013 Bonds A-3	-	-	25,000	0%
Interest Expense				
Series 2013 Bonds A-1	-	-	184,563	0%
Series 2013 Bonds A-3	-	-	71,413	0%
Total Expenditures and Other Uses:	**$ -**	**$ -**	**$ 355,976**	**0%**
Net Increase/ (Decrease) in Fund Balance	3,876	3,876	89,536	
Fund Balance - Beginning	864,939	864,939	864,939	
Fund Balance - Ending	**$ 868,815**	**$ 868,815**	**$ 954,475**	

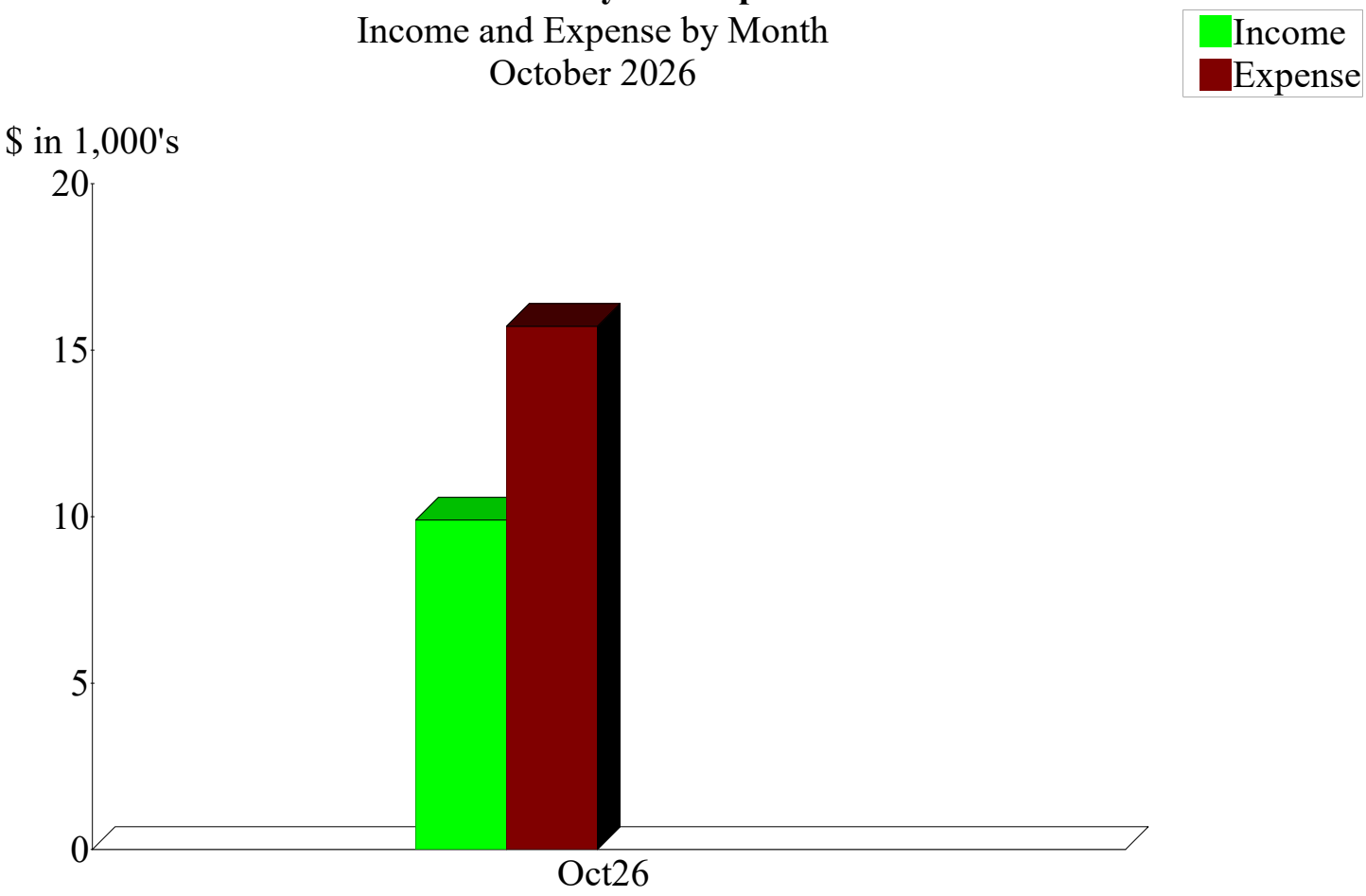
Artisan Lakes Community Development District
Debt Service Fund - Series 2018
Statement of Revenues, Expenditures and Changes in Fund Balance
Through October 31, 2026

Description	October	Year to Date	Total Annual Budget	% of Budget
Revenue and Other Sources				
Carryforward	$ -	$ -	$ -	0%
Interest Income				
Reserve Account	386	386	4,787	8%
Prepayment Account	1,114	1,114	219	509%
Revenue Account	4	4	10,343	0%
Special Assessments - Prepayments				
Special Assessments - On Roll	1,926	1,926	500,011	0%
Other Fees and Charges				
Discounts for Early Payment	-	-	(35,001)	0%
Total Revenue and Other Sources:	**$ 3,430**	**$ 3,430**	**$ 480,359**	**1%**
Expenditures and Other Uses				
Debt Service				
Principal Debt Service - Mandatory				
Series 2018	-	-	135,000	0%
Principal Debt Service - Early Redemptions				
Series 2018	-	-	-	0%
Interest Expense				
Series 2018	-	-	325,006	0%
Total Expenditures and Other Uses:	**$ -**	**-**	**$ 460,006**	**0%**
Net Increase/ (Decrease) in Fund Balance	3,430	3,430	20,353	
Fund Balance - Beginning	523,530	523,530	523,530	
Fund Balance - Ending	**$ 526,960**	**526,960**	**$ 543,883**	

Artisan Lakes Community Development District

Income and Expense by Month

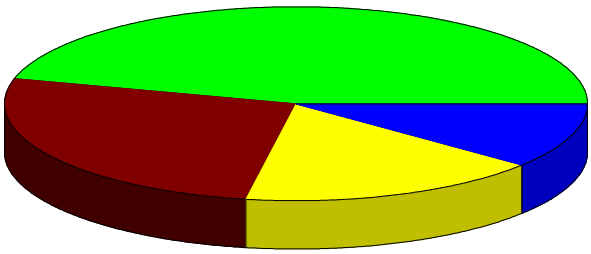
October 2026



Expense Summary

October 2026

5134500 · Insurance		45.94%
9099000 · Reserve Allocations		26.50
5120000 · Executive		16.96
5130000 · Financial and Adminis		10.60
Total	$15,724.00	



By Account