MINUTES OF MEETING
WENTWORTH ESTATES
COMMUNITY DEVELOPMENT DISTRICT

The Regular Meeting of the Board of Supervisors of the Wentworth Estates Community Development District was held on Thursday, July 30, 2026, at the Treviso Bay Clubhouse, 9800 Treviso Bay Boulevard, Naples, Florida 34113. It began at 8:30 a.m. and was presided over by Mr. Joe Newcomb, Chairperson, and James P. Ward as Secretary.

Present and constituting a quorum:

Joe Newcomb	Chairperson
Robert Cody	Vice Chairperson
Steve Barger	Assistant Secretary
Suzanne Sadowski Bertha	Assistant Secretary
Andrew Gasworth	Assistant Secretary

Also present were:

James P. Ward	District Manager
Susan Singer	Senior Accountant w/PFM
Vivian Carvalho	Senior District Manager w/PFM
Racheal Meade	District Manager w/PFM
Greg Urbancic	District Attorney
Richard Freeman	District Engineer

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, District Manager, called the meeting to order at approximately 8:30 a.m. He conducted roll call; all Members of the Board were present, constituting a quorum.

SECOND ORDER OF BUSINESS **Notice of Advertisement**

Notice of Advertisement of Public Hearings and Regular Meeting

THIRD ORDER OF BUSINESS **Consideration of Minutes**

May 14, 2026 – Regular Meeting Minutes

Mr. Ward asked if there were any additions, corrections, or deletions to the Minutes.

On MOTION made by Robert Cody, seconded by Joe Newcomb, and with all in favor, the May 14, 2026 Regular Meeting Minutes were approved.

Mr. Ward introduced Ms. Vivian Carvalho, Senior District Manager with PFM. He stated Ms. Carvalho would be taking over for him as he transitioned out of the community. He noted Ms. Carvalho had over 20 years of experience and extensive knowledge of CDD laws and regulations.

Ms. Vivian Carvalho greeted the Board.

FOURTH ORDER OF BUSINESS Consideration of Resolution 2026-11

Consideration of Resolution 2026-11, a Resolution of the Board of Supervisors Approving the agreements with PFM Management Services LLC, and PFM Financial Advisors LLC (Amortization Schedules Only); Authorizing the Chairperson to execute the agreements; providing general authorization; and addressing conflicts, severability, and an effective date

Mr. Ward stated Resolution 2026-11 transitioned the agreements with JP Ward & Associates, LLC over to PFM Management Services, LLC and PFM Financial Advisors, LLC. He explained there were two agreements with PFM due to SEC regulations as PFM was a global company. He noted there were some questions at the last meeting regarding the scope of services in the Financial Advisors Agreement; he spoke with PFM directly and PFM had no problem removing the Financial Advisors Agreement and just leaving the Management Agreement in place. *However, I would like to keep the Financial Services Agreement in place for purposes of being able to do amortization schedules on a periodic basis when we have to readvertise bonds. So, at the moment the agreement you have in the agenda only has the Financial Services Agreement doing the amortization schedules. It is under $1,000 dollars, but once in a while when we have prepayments, I don't have time to come back and do a board meeting to get an agreement in place to do an amortization schedule. I would like to keep that piece of the Financial Services Agreement in place as we move forward.*

Mr. Steve Barger: When do we need to do the re-amortizations?

Mr. Ward: For you all there is only one time when we have prepayments of assessments from bonds. The last time we did it was 2025, we had one prepayment. We have one every year or so that comes in. The other reason is, if we have any excess revenue we have in the account we can take that excess revenue, move it to the prepayment account, and call bonds at that point in time. To date, you have not had a lot of excess revenue in your bank account for this bond issue, but if we have it, it would be a good idea. In a normal course I go through the process of moving some of those funds over and re-amortizing the bonds at that point.

Mr. Barger: Would we use excess revenue at this interest rate? Why would you pay it early at this rate?

Mr. Ward: The excess revenue either comes from interest earnings, because all the funds are invested, so we get interest earnings on the accounts on a yearly basis and depending upon when people pay your assessments, if you pay them a little in the January/February time, you get a little extra revenue in those periods because they don't get the full discount. But we do get a little bit of money coming in through interest income and through collections happening in January and February. That will give us a little bit of extra revenue that we can call a little bit of bonds on a periodic basis during the year. He asked if there were any questions; hearing none, he called for a motion.

On MOTION made by Robert Cody, seconded by Andrew Gasworth, and with all in favor, Resolution 2026-11 was adopted, and the Chair was authorized to sign.

FIFTH ORDER OF BUSINESS Staff Reports

I. District Attorney

Mr. Greg Urbancic reminded the Board to finish the 2026 ethics training before the end of the calendar year.

Mr. Ward stated new links would be sent out for the ethics training in the next few weeks, as well as continual reminders.

II. District Engineer

No report.

III. District Asset Manager

a) Asset Managers Report May 1, 2026
b) Water Quality Report Treviso Bay June 2026

Mr. Richard Freeman stated holiday lighting would begin going up over the next few weeks; it would not be turned on until closer to the holidays. He reported in July one hog was trapped and removed; since hog trapping began approximately 59 hogs were trapped and removed.

Mr. Barger stated it was great to hear there was such a reduction in the number of hogs that only one was trapped this month. He asked if anyone heard complaints about hogs recently.

The Board agreed it had not heard any complaints about hogs recently.

Ms. Suzanne Bertha asked if the hogs were seasonal.

Mr. Freeman responded hogs were more often seen during the rainy season. He said, lastly, he was identifying uplighting on the oak trees which needed to be repaired or replaced.

Mr. Newcomb noted the golf course would close on March 1. He asked if the pond work on the golf course would be done while the golf course was closed.

Mr. Freeman indicated he coordinated with the golf course regarding any work which needed to be done on the golf course.

Mr. Ward asked what the golf course was doing.

Mr. Newcomb stated the golf course would be installing a new irrigation system, new turf, and doing some bridge repairs.

Mr. Ward stated the front entrance looked excellent; he was impressed with the work done this year on the landscaping program. He commended Mr. Freeman for his efforts.

Discussion ensued regarding the landscaping vendors used by the CDD and the HOA.

IV. District Manager

a) **Discussion of Connection of Commercial Driveway into CDD road for access to Community; (Fence Access on CDD Property or leave access open)**
b) **Important Meeting Dates for Fiscal Year 2026**
   - Next Meeting: Thursday September 10, 2026
c) **Commission on Ethics required Annual Ethics Training Memorandum**
d) **Financial Statements for period ending May 31, 2026 (unaudited)**
e) **Financial Statements for period ending June 30, 2026 (unaudited)**

Mr. Ward stated the commercial driveway at the entrance was about to be connected to the community roadway. He explained the commercial driveway would remain closed until construction was completed and then it would be reopened. He said there would be traffic coming in via the commercial driveway once construction was completed and the driveway opened.

Ms. Bertha asked if the driveway would remain closed until the development was completed in full, including the two condo buildings and commercial buildings.

Mr. Ward responded he believed the developer would want to open it before then, but he would not agree to open it unless the developer pushed them to open it. *We've done a lot of work on that entrance. We've repaved all the roadways out front. I really, personally, do not want that construction traffic coming in through here, so we are going to try to leave it closed as much as we can.*

Mr. Freeman: One other note. I'm looking at adding more shrubs along where you come out. I'm worried that headlights at night are going to shine right into the townhomes. So, I'm looking to do something to block that.

Mr. Barger: Could we consider putting up a gate there, so we have the option to open it or close it? Does it have to be open?

Mr. Ward: No. It's your roadway. It doesn't have to be open. We could put up a gate if needed and keep it open or closed as needed. I like that idea. I'm not a fan of keeping that open. It's a little early for the gate, but we do have a chain link gate at the moment. But Steve, I do like the idea of a fixed gate that we could control the opening and closing on going forward.

Mr. Newcomb: As you said, there are more condos coming. It seems like they are rushing to finish the one, get it open and sold. How much traffic can that really generate?

Discussion continued regarding entrances, gates, the commercial development, and installing a gate across the commercial driveway; and the commercial driveway not being a road intended for public access.

Mr. Ward stated the ethics training links and reminders would be sent out on a going forward basis until the end of the year.

SIXTH ORDER OF BUSINESS Supervisor's Requests

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

Mr. Barger asked if the accounting and such was transferred over to PFM; he did not receive the agenda.

Mr. Ward explained his team was transitioned to PFM but was still working as it was before. He stated in the calendar invite itself, there was a PDF attached which had the agenda. He stated he would also send Mr. Barger a separate PDF as well.

Mr. Barger stated he might have missed it because he has been busy.

Mr. Ward indicated operations remained the same and the PDF should be attached to the calendar invite, but he would double check to make sure Mr. Barger received it.

Mr. Barger asked when the next meeting would be held.

Mr. Ward stated the next meeting was scheduled for September, but he was unsure a September meeting would be needed. He said the next meeting would be in the fall, most likely.

Mr. Barger asked about the elections.

Mr. Ward stated the CDD had two seats up for election but there were no challengers, so Joe Newcomb and Andrew Gasworth would be on the CDD Board for another four years.

Ms. Vivian Carvalho stated she would be working with Mr. Ward over the next few months on the look of the agenda. She said starting in the fall the agenda would look a little different, but the processes would remain the same.

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 8:56 a.m.

On MOTION made by Joe Newcomb, seconded by Robert Cody, and with all in favor, the meeting was adjourned.

Wentworth Estates Community Development District

Signature: James Ward
James Ward (Sep 14, 2026 12:56:48 EDT)

Email: wardj@pfm.com

James P. Ward, Secretary

Signature:
Joseph Newcomb (Sep 27, 2026 18:50:22 EDT)

Email: sales@medicount.com

Joe Newcomb, Chairman

WE - Minutes 07 30 2026 - For Signature

Final Audit Report 2026-09-27

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