



**BLUE LAKE
COMMUNITY DEVELOPMENT
DISTRICT**

**LEE COUNTY
SPECIAL BOARD MEETING
NOVEMBER 18, 2025
3:00 P.M.**

**Special District Services, Inc.
The Oaks Center
2501A Burns Road
Palm Beach Gardens, FL 33410**

**www.bluelakecdd.org
561.630.4922 Telephone
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561.630.4923 Facsimile**

AGENDA
BLUE LAKE
COMMUNITY DEVELOPMENT DISTRICT
WildBlue Social Building
18721 WildBlue Boulevard
Fort Myers, Florida 33913
SPECIAL BOARD MEETING
November 18, 2025
10:00 A.M.

Call- In: (800) 743-4099 Passcode: 7423990 (for residents)

- A. Call to Order
- B. Proof of Publication.....Page 1
- C. Establish Quorum
- D. Additions or Deletions to Agenda
- E. Approval of Minutes
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 - 1. Update on Lake Bank Repair Project
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- G. New Business
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- H. Administrative Matters
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 - a. Update on Map of Maintenance Responsibilities/Ownership
 - 2. Attorney’s Report
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 - b. Next Meeting – December 9, 2025 & January 13, 2026
- I. Comments from the Public for Items Not on the Agenda
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- L. Adjourn

Publication Date
2025-11-10

Subcategory
Miscellaneous Notices

BLUE LAKE COMMUNITY
DEVELOPMENT DISTRICT
NOTICE OF SPECIAL BOARD
MEETING AND ATTORNEY-CLIENT SESSION

Notice is hereby given that the Blue Lake Community Development District (District) Board of Supervisors (Board) will conduct the following attorney-client sessions at its special board meeting:

Attorney-Client Session

November 18, 2025, at 10:00 a.m.

18721 WildBlue Boulevard

Fort Myers, Florida 33913

The attorney-client session, which is closed to the public, is being held pursuant to Section 286.011(8), Florida Statutes, to discuss settlement negotiations and strategy related to litigation expenditures concerning the ongoing litigation entitled Blue Lake Community Development District v. Lennar Homes, LLC; CalAtlantic Group LLC; Barraco and Associates, Inc; Turrell, Hall & Associates, Inc., Marine Contracting Group Inc.; and Earth Tech Enterprises Inc., Case No: 2025-CA-004085. The following persons are anticipated to be in attendance at the attorney-client session: Christopher Hasty, David Bello, Norbert Larsen, Mark Rapponotti, Terry Vette, David Gurley, Christopher Fiore, Kathleen Meneely, Wesley Haber, and a court reporter. The attorney-client session is expected to last approximately 120 minutes.

The special board meeting begins at 10:00 a.m. on the same date and at the same location and will occur prior to the attorney-client session for the purpose of considering any business of the District and will continue to be held after the attorney-client session for the purpose of taking up any business that may be the result of the attorney-client session or any other business of the District. Both portions of the special board meeting are open to the public and will be conducted in accordance with the provisions of Florida law for community development districts. A copy of the agenda for the meeting may be obtained from the District Manager, Special District Services, Inc., 2501A Burns Road, Palm Beach Gardens, Florida 33410.

The board meeting may be continued to a date, time, and place approved by the Board on the record without additional publication of notice. There may be occasions when one or more Supervisors will participate by telephone.

Pursuant to provisions of the Americans with Disabilities Act, any person requiring special accommodations to participate in this meeting/hearing/workshop is asked to advise the District Office at least forty-eight (48) hours before the meeting/hearing by contacting the District Manager at (561) 630-4922. If you are hearing or speech impaired, please contact the Florida Relay Service by dialing 7-1-1, or 1-800-955-8771 (TTY) / 1-800-955-8770 (Voice), who can aid you in contacting the District Office.

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

Kathleen Meneely, District Manager

BLUE LAKE COMMUNITY
DEVELOPMENT DISTRICT

No.11815309 Nov. 10, 2025

**BLUE LAKE COMMUNITY DEVELOPMENT DISTRICT
REGULAR BOARD MEETING
OCTOBER 14, 2025**

A. CALL TO ORDER

The October 14 2025, Regular Board Meeting of the Blue Lake Community Development District (the “District”) was called to order at 3:03 p.m. in the WildBlue Social Building located at 18721 WildBlue Boulevard, Fort Myers, Florida 33966.

B. PROOF OF PUBLICATION

Proof of publication was presented which showed that notice of the Regular Board Meeting had been published in the *Naples Daily News* on October 3, 2025, as legally required.

C. ESTABLISH A QUORUM

It was determined that the attendance of the following Board Members constituted a quorum:

Chairman	Chris Hasty	Present
Vice Chairman	David Bello	Present
Supervisor	Norbie Larsen	Present via phone
Supervisor	Mark Rapponotti	Absent
Supervisor	Terry Vette	Present

Also present were the following Staff Members:

District Manager	Kathleen Meneely	Special District Services, Inc.
District Counsel	Wes Haber (via phone)	Kutak Rock LLP
District Engineer	Frank Savage (via phone)	Barraco and Associates, Inc.

Also present were:

Marc & Sydell Nusbaum, Jim Spalding, Bob Kudlacik, Dale Brazdis, Frank De Rosa, Tom & Regina Juszczak, Steve Kiraly and Linda Jones (HOA).

D. ADDITIONS OR DELETIONS TO AGENDA

Mr. Savage noted that he would like to present the Supplemental Engineering Report and it was the consensus of the Board to add it under New Business.

E. APPROVAL OF MINUTES

1. September 9, 2025, Regular Board Meeting

The minutes of the September 9, 2025, Regular Board Meeting were presented for consideration.

A **motion** was made by Mr. Bello, seconded by Mr. Vette and passed unanimously approving the minutes of the September 9, 2025, Regular Board Meeting, as presented.

F. OLD BUSINESS

1. Update on Lake Bank Repair Project

a. Gantt Chart Update

Mr. Savage noted that the updated schedule had been distributed as had the 90% plans. He indicated the plans were consistent with the Wild Blue plans and had been incorporated into the permit and bid documents that were being prepared. He explained that a parallel set was being prepared for landward remediation and also stated that Mr. Larsen had been working closely with staff, on behalf of the Board, on the plans and documents. Mr. Larsen stated that they were working on figuring out marine mattress alternatives, noting that this would not hold up the bid documents, as changes could be made through addendums and alternatives in the package. He continued that if a few extra weeks were needed for extra facts to be researched before going out to bid, he believes that the time should be taken in order to save money. Mr. Bello noted that the current chart showed we were on schedule and the repairs should be built by late June 2026. Mr. Larsen stated that if additional time were necessary, it would be weeks not months.

Mrs. Nusbaum asked if it hurt the District that Wild Blue was already in the bidding process. Mr. Savage stated that the schedule was about 2-3 weeks apart and any lessons learned were being applied to this District. He continued that he anticipates all bidders being interested in both projects and intends to cast a wide net, noting that for Wild Blue, the vendors he has heard from were all local. Mr. Bello opined that if both districts wanted to use the same contractor there may be issues with timing with Mr. Vette noted that there were also advantages to have one contractor do it at the same time.

Mr. Spalding expressed that there may be an advantage in pricing if both projects had the same contractor. Mr. Bello expressed that he felt this might be a risk. Mr. Vette summarized that we would know more when we get into the bid process. Mr. Larsen stated that requiring a bid bond would eliminate a lot of bidders but he believes we should keep that requirement in the RFP.

2. Consider Liability Document for Dock Holders

Mr. Haber noted that the draft of the liability document was in the agenda, noting that it gives homeowners with docks a decision to remove or to take responsibility and liability for future repairs. He suggested the Board approve the document, in substantial form, and name a Board Member to coordinate with the homeowners impacted.

After discussion, a motion was made by Mr. Bello, seconded by Mr. Hasty and passed unanimously approving the Liability Document for Dock Holders and naming David Bello as the Board contact for dock related issues.

Ms. Meneely handed out questions received from a two residents concerning the docks with Mr. Bello noting that the residents who inquired were not in Phase 1 so they are not impacted by the document. He also noted that the questions were construction related and we will have more answers as the project proceeds. Mr. Savage stated he would work on connecting addresses with the impacted docks and Ms. Meneely noted that letters could be sent to those residents.

Mr. Juszczak asked what happened if a resident failed to comply and Mr. Bello stated that if they do not sign the document, their dock will be moved and the cost will be billed back to the homeowners. He continued that the letter would state this information along with a deadline date. Mr. Hasty further noted that the property could also be liened upon.

G. NEW BUSINESS

1. Discussion Regarding Lake Bank Repair Bid Documents

a. Discussion Regarding Increasing Bid Interest

Mr. Larsen noted that the documents were being reviewed and looked good. Mr. Savage indicated that they could be put on the next meeting agenda for consideration and would be distributed prior to the meeting for review.

Mr. Savage noted that Cummins Cederberg was aware of casting a wide net and Mr. Larsen stated that the project could be advertised in many locations. He also reiterated that the bond requirement would give a certain pool of builders who can meet that requirement. Mr. Savage agreed that there were systems to use.

2. (ADDED) Consider Master Engineering Report

Mr. Savage presented the Supplement to the Blue Lake Master Engineer's Report dated October 3, 2025, noting it was used for bonding. He explained that the numbers assume a full revetment all the way around the lake with Mr. Larsen opining that he felt the numbers were too high. Mr. Haber explained that the report was used for the bond validation process which was held on Monday and approved. Mr. Haber explained that there was \$5 Million left in the existing validation and now an additional \$20 Million in new validation funds.

Mr. Vette noted he would send the supplemental engineer's report to Mr. Kessler for fund bonding. Discussion ensued on the bonding process with Mr. Vette noting that there were dual processes going on including litigation for the repair costs. Mr. Hasty reiterated that the supplemental report was way above the best estimate of costs for the current phase of the project. Mr. Haber noted that numbers would be refined with time, as the project keeps moving along.

H. ADMINISTRATIVE MATTERS

1. Engineer's Report

a. Update on Map of Maintenance Responsibilities/Ownership

Mr. Savage explained that research was taking place and requisitions were being reviewed in order to develop the map. As an ongoing project, they found that all main storm lines were funded by the CDD but the rear yard drainage was not, noting that the roadways were private but the curbing and catch basins were CDD. He noted that some dedications were lacking so they are identifying and working with the attorney on those issues. Mr. Bello summarized by saying, in the backyards, anything to make things pretty is HOA and water flow is the District's responsibility.

2. Attorney's Report

Mr. Haber had nothing further to report.

Ms. Meneely reminded the Board to complete their 4-hours of ethics training before the end of the year. Ms. Jones noted that the HOA had decided not to take over maintenance of the fence and Ms. Meneely pointed out that the residents may eventually want a higher level of maintenance than the District currently provides.

3. Manager's Report

a. Financials

Ms. Meneely presented the financials. The Board Members had no questions.

b. Meeting Schedule

Ms. Meneely noted that the next meeting would include an attorney-client session and were scheduled for October 28, 2025, and November 11, 2025.

After discussion, a **motion** was made by Mr. Bello, seconded by Mr. Vette and passed unanimously cancelling the second meeting in October.

Mr. Vette noted he would not be able to attend the November 11 meeting when the attorney-client session would also be held.

Mr. Bello noted that mediation was set for December 3 so it will have to be held in November. Mr. Larsen noted that he might be able to attend in person.

c. Discussion Regarding Process to Fill Future Board Vacancy

Ms. Meneely advised of a letter in the agenda packet from Mr. Hasty advising that he intends to resign in the future and recommended starting the search for a replacement.

After discussion, it was consensus of the Board for Ms. Meneely to send the HOA a vacancy notice for distribution with a return due date of November 3, noting that the Board will consider applicants at the November 11 meeting.

I. COMMENTS FROM THE PUBLIC FOR ITEMS NOT ON THE AGENDA

There were no comments from the public for items not on the agenda.

J. BOARD MEMBER COMMENTS

The Board Members had no further comments.

K. ADJOURNMENT

There being no further business to come before the Board, a **motion** was made by Mr. Hasty, seconded by Mr. Bello and passed unanimously adjourning the Regular Board Meeting at 4:25 p.m.

ATTESTED BY:

Secretary/Assistant Secretary

Chairperson/Vice-Chair

RESOLUTION NO. 2025-06

A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE BLUE LAKE COMMUNITY DEVELOPMENT DISTRICT AUTHORIZING AND ADOPTING AN AMENDED FINAL FISCAL YEAR 2024/2025 BUDGET (“AMENDED BUDGET”), PURSUANT TO CHAPTER 189, FLORIDA STATUTES; AND PROVIDING AN EFFECTIVE DATE.

WHEREAS, the Board of Supervisors of the Blue Lake Community Development District (“District”) is empowered to provide a funding source and to impose special assessments upon the properties within the District; and,

WHEREAS, the District has prepared for consideration and approval an Amended Budget.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE BLUE LAKE COMMUNITY DEVELOPMENT DISTRICT, THAT:

Section 1. The Amended Budget for Fiscal Year 2024/2025 attached hereto as Exhibit “A” is hereby approved and adopted.

Section 2. The Secretary/Assistant Secretary of the District is authorized to execute any and all necessary transmittals, certifications or other acknowledgements or writings, as necessary, to comply with the intent of this Resolution.

PASSED, ADOPTED and EFFECTIVE this 18th day of November, 2025.

ATTEST:

**BLUE LAKE
COMMUNITY DEVELOPMENT DISTRICT**

By: _____
Secretary/Assistant Secretary

By: _____
Chairperson/Vice Chairperson

Blue Lake Community Development District

**Amended Final Budget For
Fiscal Year 2024/2025
October 1, 2024 - September 30, 2025**

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- II AMENDED FINAL DEBT SERVICE FUND BUDGET**

AMENDED FINAL BUDGET
BLUE LAKE COMMUNITY DEVELOPMENT DISTRICT
OPERATING FUND
FISCAL YEAR 2024/2025
OCTOBER 1, 2024 - SEPTEMBER 30, 2025

	FISCAL YEAR 2024/2025 BUDGET 10/1/24 - 9/30/25	AMENDED FINAL BUDGET 10/1/24 - 9/30/25	YEAR TO DATE ACTUAL 10/1/24 - 9/29/25
REVENUES			
O & M Assessments	581,132	581,661	581,661
Debt Assessments	663,697	661,942	661,942
Developer Contribution - O&M	0	0	0
Other Revenues - Line Of Credit Proceeds	0	122,100	122,100
Interest Income	480	9,950	9,847
Total Revenues	\$ 1,245,309	\$ 1,375,653	\$ 1,375,550
EXPENDITURES			
Supervisor Fees	12,000	6,400	6,400
Payroll Taxes (Employer)	960	490	490
Engineering/Inspections	40,000	54,500	50,251
Engineering Extraordinary - Retaining Wall	0	94,000	78,999
Mitigation Monitoring	138,500	220,000	211,353
Lake Maintenance	60,000	49,000	45,196
Flow Way Inspection Certification	5,000	1,000	0
Vista Dry Retention Area	0	3,900	3,900
Detention Area Maintenance	36,000	35,441	35,441
Miscellaneous Maintenance (Shoreline Stabilization)	55,000	68,000	62,492
Maintenance Reserve	50,000	10,000	0
Management	30,576	30,576	30,576
Legal	40,000	45,000	17,319
Legal Extraordinary - Retaining Wall	0	115,000	98,958
Assessment Roll	4,000	4,000	4,000
Audit Fees	4,100	3,800	3,800
Arbitrage Rebate Fee	650	650	650
Insurance	13,610	12,850	12,850
Legal Advertisements	6,000	5,000	3,776
Miscellaneous	2,000	3,500	3,025
Postage	700	1,200	1,162
Office Supplies	1,050	1,950	1,829
Dues & Subscriptions	175	175	175
Trustee Fees	4,050	4,246	4,246
Continuing Disclosure Fee	1,000	350	350
Deficit Funding (FY 2022/2023)	41,373	0	0
Capital Outlay - Lake Bank Expenditure	0	133,400	133,400
Construction Costs	0	50,000	25,550
TOTAL EXPENDITURES	\$ 546,744	\$ 954,428	\$ 836,188
Excess/ (Shortfall)	\$ 698,565	\$ 421,225	\$ 539,362
Bond Payments	(623,875)	(636,903)	(636,903)
Balance	\$ 74,690	\$ (215,678)	\$ (97,541)
County Appraiser & Tax Collector Fee	(24,897)	(1,201)	(1,201)
Discounts For Early Payments	(49,793)	(45,820)	(45,820)
Net Excess/ (Shortfall)	\$ -	\$ (262,699)	\$ (144,562)

FUND BALANCE AS OF 9/30/24
FY 2024/2025 ACTIVITY
FUND BALANCE AS OF 9/30/25

\$119,418
(\$262,699)
(\$143,281)

AMENDED FINAL BUDGET
BLUE LAKE COMMUNITY DEVELOPMENT DISTRICT
DEBT SERVICE FUND
FISCAL YEAR 2024/2025
OCTOBER 1, 2024 - SEPTEMBER 30, 2025

	FISCAL YEAR 2024/2025 BUDGET 10/1/24 - 9/30/25	AMENDED FINAL BUDGET 10/1/24 - 9/30/25	YEAR TO DATE ACTUAL 10/1/24 - 9/29/25
REVENUES			
Interest Income	500	32,781	32,781
NAV Tax Collection	623,875	636,903	636,903
Payment By Developer	0	0	0
Total Revenues	\$ 624,375	\$ 669,684	\$ 669,684
EXPENDITURES			
Principal Payments	220,000	220,000	220,000
Interest Payments	403,238	407,638	407,638
Bond Redemption	1,137	0	0
Transfer To Construction Fund	0	13,688	13,688
Total Expenditures	\$ 624,375	\$ 641,326	\$ 641,326
Excess/ (Shortfall)	\$ -	\$ 28,358	\$ 28,358

FUND BALANCE AS OF 9/30/24	\$595,562
FY 2024/2025 ACTIVITY	\$28,358
FUND BALANCE AS OF 9/30/25	\$623,920

Notes

Reserve Fund Balance = \$311,938*. Revenue Fund Balance = \$311,982*.

Revenue Fund Balance To Be Used To Make 12/15/2025 Interest Payment Of \$199,419.

* Approximate Amounts

Series 2019 Bond Information

Original Par Amount =	\$10,400,000	Annual Principal Payments Due:
Interest Rate =	3.50% - 4.5%	June 15th
Issue Date =	May 2019	Annual Interest Payments Due:
Maturity Date =	June 2049	June 15th & December 15th
Par Amount As Of 9/30/25 =	\$9,195,000	

RESOLUTION NO. 2025-07

A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE BLUE LAKE COMMUNITY DEVELOPMENT DISTRICT ADOPTING AN ANNUAL REPORT OF GOALS, OBJECTIVES, AND PERFORMANCE MEASURES AND STANDARDS; PROVIDING A SEVERABILITY CLAUSE; AND PROVIDING AN EFFECTIVE DATE.

WHEREAS, the Blue Lake Community Development District (the “District”) is a local unit of special-purpose government organized and existing under and pursuant to Chapters 189 and 190, Florida Statutes, as amended; and

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

WHEREAS, the District adopted Resolution 2024-06 on August 13, 2024, establishing goals and objectives for the District and creating performance measures and standards to evaluate the District’s achievement of those goals and objectives; and

WHEREAS, pursuant to Section 189.0694, Florida Statutes, the District must adopt and publish on its website an annual report prior to December 1st of each year, describing 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 any goals or objectives the district failed to achieve.

WHEREAS, the District Manager has the annual report of the District’s goals, objectives, and performance measures and standards attached hereto and made a part hereof as **Exhibit A** (the “Annual Report”) and presented the Annual Report 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 annual report of the goals, objectives and performance measures and standards.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE BLUE LAKE COMMUNITY DEVELOPMENT DISTRICT, THAT:

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 Annual Report regarding the District’s success or failure in achieving the adopted goals and objectives and directs the District Manager to take all necessary actions to comply with Section 189.0694, Florida Statutes.

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 this 18th day of November, 2025.

ATTEST:

**COMMUNITY
DEVELOPMENT DISTRICT**

Secretary/Assistant Secretary

Chairman, Board of Supervisors

Exhibit A: Annual Report of Performance Measures/Standards

Exhibit A

Program/Activity: District Administration

Goal: Remain compliant with Florida Law for all district meetings

Objectives:

- Notice all District regular, special, and public hearing meetings
- Conduct all post-meeting activities
- District records retained in compliance with Florida Sunshine Laws

Performance Measures:

- All Meetings publicly noticed as required (YES)
- Meeting minutes and post-meeting action completed (YES)
- District records retained as required by law (YES)

Program/Activity: District Finance

Goal: Remain Compliant with Florida Law for all district financing activities

Objectives:

- District adopted fiscal year budget
- District amended budget at end of fiscal year
- Process all District finance accounts receivable and payable
- Support District annual financial audit activities

Performance Measures:

- District adopted fiscal year budget (YES)
- District amended budget at end of fiscal year (YES)
- District accounts receivable/payable processed for the year (YES)
- “No findings” for annual financial audit (NO)
 - If “yes” explain

Program/Activity: District Operations

Goal: Insure, Operate and Maintain District owned Infrastructure & assets

Objectives:

- Annual renewal of District insurance policy(s)
- Contracted Services for District operations in effect
- Compliance with all required permits

Performance Measures:

- District insurance renewed and in force (YES)
- Contracted Services in force for all District operations (YES)
- Permits in compliance (YES)

Blue Lake
Community Development District

**Financial Report For
September 2025**

**BLUE LAKE COMMUNITY DEVELOPMENT DISTRICT
MONTHLY FINANCIAL REPORT
SEPTEMBER 2025**

	Annual Budget 10/1/24 - 9/30/25	Actual Sep-25	Year To Date Actual 10/1/24 - 9/30/25
REVENUES			
O & M Assessments	581,132	0	581,661
Debt Assessments	661,941	0	661,942
Other Revenues	480	0	0
Interest Income	0	0	9,847
Line of Credit Proceeds	0	0	122,100
Total Revenues	\$ 1,243,553	\$ -	\$ 1,375,550
EXPENDITURES			
Administrative Expenditures			
Supervisor Fees	12,000	600	6,400
Payroll Taxes (Employer)	960	46	490
Management	30,576	2,548	30,576
Legal	40,000	0	17,319
Legal Extraordinary - Retaining Wall, Etc.	0	0	98,958
Assessment Roll	4,000	4,000	4,000
Audit Fees	4,100	0	3,800
Arbitrage Rebate Fee	650	0	650
Insurance	13,610	0	12,850
Legal Advertisements	6,000	0	3,776
Miscellaneous	2,000	211	3,025
Postage	700	59	1,162
Office Supplies	1,050	64	1,829
Dues & Subscriptions	175	0	175
Trustee Fee	4,050	0	4,246
Continuing Disclosure Fee	1,000	350	350
Deficit Funding (FY 2022/2023)	41,373	0	0
Capital Outlay - Lake Bank Expenditure	0	0	133,400
Total Administrative Expenditures	162,244	7,878	323,006
Maintenance Expenditures			
Engineering/Inspections	40,000	7,738	50,251
Engineering Extraordinary - Retaining Wall	0	0	78,999
Mitigation Monitoring	138,500	0	211,353
Lake Maintenance	60,000	2,866	45,196
Flow Way Inspection Certification	5,000	0	0
Detention Area Maintenance	36,000	3,011	35,441
Miscellaneous Maintenance (Fence Repairs, Stabilization Analysis, etc.)	55,000	8,220	62,492
Maintenance Reserve	50,000	0	0
Vista Dry Retention Area	0	0	3,900
Capital Outlay - Lake Bank	0	0	0
Construction Costs	0	25,550	25,550
Total Maintenance Expenditures	384,500	47,385	513,182
Total Expenditures	\$ 546,744	\$ 55,263	\$ 836,188
REVENUES LESS EXPENDITURES	\$ 696,809	\$ (55,263)	\$ 539,362
Bond Payments	(623,875)	0	(636,903)
BALANCE	\$ 72,934	\$ (55,263)	\$ (97,541)
County Appraiser & Tax Collector Fee	(24,312)	0	(1,201)
Discounts For Early Payments	(48,622)	0	(45,820)
EXCESS/ (SHORTFALL)	\$ -	\$ (55,263)	\$ (144,562)
Carryover From Prior Year	0	0	0
NET EXCESS/ (SHORTFALL)	\$ -	\$ (55,263)	\$ (144,562)

Note - Draw From Lake Bank Repair Project Line Of Credit: \$133,400.

Bank Balance As Of 9/30/25	\$ 181,548.62
Accounts Payable As Of 9/30/25	\$ 73,293.07
Line of Credit As Of 9/30/25	\$ 133,400.00
Accounts Receivable As Of 9/30/25	\$ -
Available Funds As Of 9/30/25	\$ (25,144.45)

BLUE LAKE CDD
TAX COLLECTIONS
2024/2025

#	ID#	PAYMENT FROM	DATE	FOR	Tax Collect Receipts	Interest Received	Commissions Paid	Discount	Net From Tax Collector	O & M Assessment Income (Before Discounts & Fee)	Debt Assessment Income (Before Discounts & Fee)	O & M Assessment Income (After Discounts & Fee)	Debt Assessment Income (After Discounts & Fee)	Debt Assessments Paid to Trustee
									\$1,243,075.32	\$581,132.00	\$ 661,941.00	\$581,132.00	\$ 661,941.00	
									\$1,170,139.00	\$546,264.00	\$ 623,875.00	\$546,264.00	\$ 623,875.00	\$ 623,875.00
1		Paid to Lee County Prop Appraiser	11/12/24	Fees			\$ (423.00)		\$ (423.00)			\$ (198.00)	\$ (225.00)	
2	1	Lee County Tax Collector	11/14/24	NAV Taxes	\$ 4,474.37		\$ (778.32)	\$ (234.91)	\$ 3,461.14	\$ 2,091.77	\$ 2,382.60	\$ 1,618.04	\$ 1,843.10	\$ 1,618.10
3	2	Lee County Tax Collector	11/26/24	NAV Taxes	\$ 227,303.84			\$ (9,091.89)	\$ 218,211.95	\$ 106,264.54	\$ 121,039.30	\$ 102,014.05	\$ 116,197.90	\$ 116,197.90
4	3	Lee County Tax Collector	12/11/24	NAV Taxes	\$ 779,869.44			\$ (31,193.92)	\$ 748,675.52	\$ 364,588.94	\$ 415,280.50	\$ 350,005.77	\$ 398,669.75	\$ 398,669.75
5	4	Lee County Tax Collector	12/30/24	NAV Taxes	\$ 66,092.31			\$ (2,536.35)	\$ 63,555.96	\$ 30,898.11	\$ 35,194.20	\$ 29,712.36	\$ 33,843.60	\$ 33,843.60
6	5	Lee County Tax Collector	01/15/25	NAV Taxes	\$ 44,524.43			\$ (1,335.75)	\$ 43,188.68	\$ 20,815.13	\$ 23,709.30	\$ 20,190.63	\$ 22,998.05	\$ 22,998.05
7	6	Lee County Tax Collector	02/13/25	NAV Taxes	\$ 52,127.12			\$ (1,164.35)	\$ 50,962.77	\$ 24,369.42	\$ 27,757.70	\$ 23,825.07	\$ 27,137.70	\$ 27,137.70
8	7	Lee County Tax Collector	03/13/25	NAV Taxes	\$ 20,389.88			\$ (263.31)	\$ 20,126.57	\$ 9,532.23	\$ 10,857.65	\$ 9,409.12	\$ 10,717.45	\$ 10,717.45
9	8	Lee County Tax Collector	04/11/25	NAV Taxes	\$ 30,689.37				\$ 30,689.37	\$ 14,347.27	\$ 16,342.10	\$ 14,347.27	\$ 16,342.10	\$ 16,342.10
10	9	Lee County Tax Collector	05/15/25	NAV Taxes/Interest	\$ 3,819.36	\$ 114.58			\$ 3,933.94	\$ 1,900.09	\$ 2,033.85	\$ 1,900.09	\$ 2,033.85	\$ 2,033.85
11	10	Lee County Tax Collector	06/11/25	NAV Taxes/Interest	\$ 5,407.68	\$ 162.24			\$ 5,569.92	\$ 2,690.32	\$ 2,879.60	\$ 2,690.32	\$ 2,879.60	\$ 2,879.60
12	11	Lee County Tax Collector	07/15/25	NAV Taxes/Interest	\$ 8,377.52	\$ 251.31			\$ 8,628.83	\$ 4,163.53	\$ 4,465.30	\$ 4,163.53	\$ 4,465.30	\$ 4,465.30
13									\$ -					\$ -
14									\$ -					\$ -
15									\$ -					\$ -
					\$ 1,243,075.32	\$ 528.13	\$ (1,201.32)	\$ (45,820.48)	\$ 1,196,581.65	\$ 581,661.35	\$ 661,942.10	\$ 559,678.25	\$ 636,903.40	\$ 636,903.40

Assessment Roll	
O&M	581,134.32
Debt	661,941.00
	<u>1,243,075.32</u>

Collections	
100.00%	

Note: \$1,243,073, \$581,132 and \$661,941 are 2024/2025 Budgeted assessments before discounts and fees.
\$1,170,139, \$546,264 and \$623,875 are 2024/2025 Budgeted assessments after discounts and fees.

\$ 1,243,075.32	
\$ 528.13	\$ 1,196,581.65
\$ (581,661.35)	\$ (559,678.25)
\$ (661,942.10)	\$ (636,903.40)
\$ -	\$ -

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Blue Lake Community Development District
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Type	Date	Num	Name	Memo	Debit	Credit	Balance
Ordinary Income/Expense							
Income							
01-3100 · O&M Assessments							
Deposit	11/14/2024		Lee county Tax Collector	O&M Assessments		2,091.77	2,091.77
Deposit	11/26/2024		Lee county Tax Collector	O&M Assessments		106,264.54	108,356.31
Deposit	12/11/2024		Lee county Tax Collector	O&M Assessments		364,588.94	472,945.25
Deposit	12/30/2024		Lee county Tax Collector	O&M Assessments		30,898.11	503,843.36
Deposit	01/15/2025		Lee county Tax Collector	O&M Assessments		20,815.13	524,658.49
Deposit	02/13/2025		Lee County Tx Collector	O&M & Debt Assessments		24,369.42	549,027.91
Deposit	03/16/2025		Lee county Tax Collector	O&M Assessments		9,532.23	558,560.14
Deposit	04/11/2025		Lee county Tax Collector	O&M Assessments		14,347.27	572,907.41
Deposit	05/15/2025		Lee county Tax Collector	O&M Assessments		1,900.09	574,807.50
Deposit	06/11/2025		Lee county Tax Collector	O&M Assessments		2,690.32	577,497.82
Deposit	07/15/2025		Lee county Tax Collector	O&M Assessments		4,163.53	581,661.35
Total 01-3100 · O&M Assessments					0.00	581,661.35	581,661.35
01-3810 · Debt Assessments							
Deposit	11/14/2024		Lee county Tax Collector	Debt Assessments		2,382.60	2,382.60
Deposit	11/26/2024		Lee county Tax Collector	Debt Assessments		121,039.30	123,421.90
Deposit	12/11/2024		Lee county Tax Collector	Debt Assessments		415,280.50	538,702.40
Deposit	12/30/2024		Lee county Tax Collector	Debt Assessments		35,194.20	573,896.60
Deposit	01/15/2025		Lee county Tax Collector	Debt Assessments		23,709.30	597,605.90
Deposit	02/13/2025		Lee County Tx Collector	O&M & Debt Assessments		27,757.70	625,363.60
Deposit	03/16/2025		Lee county Tax Collector	Debt Assessments		10,857.65	636,221.25
Deposit	04/11/2025		Lee county Tax Collector	Debt Assessments		16,342.10	652,563.35
Deposit	05/15/2025		Lee county Tax Collector	Debt Assessments		2,033.85	654,597.20
Deposit	06/11/2025		Lee county Tax Collector	Debt Assessments		2,879.60	657,476.80
Deposit	07/15/2025		Lee county Tax Collector	Debt Assessments		4,465.30	661,942.10
Total 01-3810 · Debt Assessments					0.00	661,942.10	661,942.10
01-3820 · Debt Assess-Paid To Trustee							
Bill	11/27/2024	#248304000	U.S. Bank (Tax receipts)	Acc# 248304000 series 2019 revenue fund	116,197.90		-116,197.90
Bill	11/27/2024	#248304000	U.S. Bank (Tax receipts)	Acc# 248304000 series 2019 revenue fund	1,618.10		-117,816.00
Bill	12/31/2024	248304000	U.S. Bank (Tax receipts)	Acc# 248304000 series 2019 revenue fund	398,669.75		-516,485.75
Bill	12/31/2024	#248304000	U.S. Bank (Tax receipts)	Acc# 248304000 series 2019 revenue fund	33,843.60		-550,329.35
Bill	01/31/2025	#248304000	U.S. Bank (Tax receipts)	Acc# 248304000 series 2019 revenue fund	22,998.05		-573,327.40
Bill	02/28/2025	#248304000	U.S. Bank (Tax receipts)	Acc# 248304000 series 2019 revenue fund	27,137.70		-600,465.10
Bill	03/31/2025	#248304000	U.S. Bank (Tax receipts)	Acc# 248304000 series 2019 revenue fund	10,717.45		-611,182.55
Bill	04/30/2025	#248304000	U.S. Bank (Tax receipts)	Acc# 248304000 series 2019 revenue fund	16,342.10		-627,524.65
Bill	05/31/2025	248304000	U.S. Bank (Tax receipts)	Acc# 248304000 series 2019 revenue fund	2,033.85		-629,558.50
Bill	06/30/2025	248304000	U.S. Bank (Tax receipts)	Acc# 248304000 series 2019 revenue fund	2,879.60		-632,438.10
Bill	07/31/2025	#248304000	U.S. Bank (Tax receipts)	Acc# 248304000 series 2019 revenue fund	4,465.30		-636,903.40
Total 01-3820 · Debt Assess-Paid To Trustee					636,903.40	0.00	-636,903.40
01-3830 · Assessment Fees							
Bill	11/12/2024	012698	Lee County Property Appraiser	FY 24/25 property appraiser fees/admin costs	423.00		-423.00
Deposit	11/14/2024		Lee county Tax Collector	Assessment Fees	778.32		-1,201.32
Total 01-3830 · Assessment Fees					1,201.32	0.00	-1,201.32
01-3831 · Assessment Discounts							
Deposit	11/14/2024		Lee county Tax Collector	Assessment Discounts	234.91		-234.91
Deposit	11/26/2024		Lee county Tax Collector	Assessment Discounts	9,091.89		-9,326.80
Deposit	12/11/2024		Lee county Tax Collector	Assessment Discounts	31,193.92		-40,520.72
Deposit	12/30/2024		Lee county Tax Collector	Assessment Discounts	2,536.35		-43,057.07

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Type	Date	Num	Name	Memo	Debit	Credit	Balance
Deposit	01/15/2025		Lee county Tax Collector	Assessment Discounts	1,335.75		-44,392.82
Deposit	02/13/2025		Lee County Tx Collector	O&M & Debt Assessments	1,164.35		-45,557.17
Deposit	03/16/2025		Lee county Tax Collector	Assessment Discounts	263.31		-45,820.48
Total 01-3831 · Assessment Discounts					45,820.48	0.00	-45,820.48
01-9410 · Interest Income (GF)							
Deposit	10/11/2024			Interest		453.91	453.91
Deposit	11/30/2024			Interest		271.97	725.88
Deposit	12/31/2024			Interest		1,946.50	2,672.38
Deposit	01/31/2025			Interest		2,033.60	4,705.98
Deposit	02/28/2025			Interest		1,430.42	6,136.40
Deposit	03/31/2025			Interest		1,453.64	7,590.04
Deposit	04/30/2025			Interest		1,037.06	8,627.10
Deposit	05/31/2025			Interest		545.36	9,172.46
Deposit	06/30/2025			Interest		352.20	9,524.66
Deposit	07/31/2025			Interest		322.07	9,846.73
Total 01-9410 · Interest Income (GF)					0.00	9,846.73	9,846.73
Total Income					683,925.20	1,253,450.18	569,524.98
Expense							
01-1310 · Engineering							
Bill	12/12/2024	28892	Barraco and Associates Inc	Misc professional services and Retaining wall restora...	8,135.00		8,135.00
Bill	12/12/2024	28891	Barraco and Associates Inc	general engineering thru 12/12/2024	2,930.00		11,065.00
Bill	02/19/2025	29178	Barraco and Associates Inc	Misc professional services thru 02/19/2025	9,589.50		20,654.50
Bill	02/19/2025	29177	Barraco and Associates Inc	surveying for Ph 1 recreational lake restoration desig...	4,351.25		25,005.75
Bill	04/09/2025	29412	Barraco and Associates Inc	retaining wall restoration	2,057.50		27,063.25
Bill	04/14/2025	29413	Barraco and Associates Inc	Miscellaneous Professional Services	1,630.00		28,693.25
Bill	06/03/2025	29662	Barraco and Associates Inc	Miscellaneous Professional Services	8,550.00		37,243.25
Bill	07/21/2025	29673	Barraco and Associates Inc	Miscellaneous Professional Services	5,270.00		42,513.25
Bill	09/23/2025	30103	Barraco and Associates Inc	Miscellaneous Professional Services	7,737.50		50,250.75
Total 01-1310 · Engineering					50,250.75	0.00	50,250.75
01-1311 · Management Fees							
Bill	10/31/2024	2024-1475	Special District Services Inc	Management fee - October 2024	2,548.00		2,548.00
Bill	11/30/2024	2024-1608	Special District Services Inc	Management fee - November 2024	2,548.00		5,096.00
Bill	12/31/2024	2024-1836	Special District Services Inc	Management fee - December 2024	2,548.00		7,644.00
Bill	01/31/2025	2025-0078	Special District Services Inc	Management fee - January 2025	2,548.00		10,192.00
Bill	02/28/2025	2025-0193	Special District Services Inc	Management fee - February 2025	2,548.00		12,740.00
Bill	03/31/2025	2025-0320	Special District Services Inc	Management fee - March 2025	2,548.00		15,288.00
Bill	04/30/2025	2025-0452	Special District Services Inc	Management fee - April 2025	2,548.00		17,836.00
Bill	05/31/2025	2025-0696	Special District Services Inc	Management fee - May 2025	2,548.00		20,384.00
Bill	06/30/2025	2025-0819	Special District Services Inc	Management fee - June 2025	2,548.00		22,932.00
Bill	07/31/2025	2025-0940	Special District Services Inc	Management fee - July 2025	2,548.00		25,480.00
Bill	08/31/2025	2025-1057	Special District Services Inc	Management fee - August 2025	2,548.00		28,028.00
Bill	09/30/2025	2025-1175	Special District Services Inc	Management fee - September 2025	2,548.00		30,576.00
Total 01-1311 · Management Fees					30,576.00	0.00	30,576.00
01-1313 · Mitigation Monitoring							
Bill	10/31/2024	3840	Sandhill Environmental Services LLC	one treatment of category 1 & 2 FLEPPC listed exoti...	54,859.05		54,859.05
Bill	10/31/2024	58M	Passarella & Associates Inc	project #17CAG2694 services thru 10/31/2024	5,820.00		60,679.05
Bill	11/30/2024	59M	Passarella & Associates Inc	project #17CAG2694 services thru 11/30/2024	1,875.00		62,554.05
Bill	03/18/2025	3985	Sandhill Environmental Services LLC	one treatment of category 1 & 2 FLEPPC listed exoti...	89,153.58		151,707.63
Bill	03/31/2025	1P	Passarella & Associates Inc	project #17CAG2694 services thru 03/31/2025	1,575.00		153,282.63

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Type	Date	Num	Name	Memo	Debit	Credit	Balance
Bill	04/30/2025	2P	Passarella & Associates Inc	project #17CAG2694 services thru 04/30/2025	1,800.00		155,082.63
Bill	05/07/2025	4031	Sandhill Environmental Services LLC	one treatment of category 1 & 2 FLEPPC listed exoti...	47,845.45		202,928.08
Bill	05/31/2025	3P	Passarella & Associates Inc	project #17CAG2694 services thru 05/31/2025	2,415.00		205,343.08
Bill	06/30/2025	4P	Passarella & Associates Inc	project #17CAG2694 services thru 06/30/2025	4,720.00		210,063.08
Bill	07/31/2025	5P	Passarella & Associates Inc	project #17CAG2694 services thru 07/31/2025	1,290.00		211,353.08
Total 01-1313 · Mitigation Monitoring					211,353.08	0.00	211,353.08
01-1315 · Legal Fees							
Bill	10/31/2024	3512125	Kutak Rock LLP	legal October 2024	3,000.00		3,000.00
Bill	01/31/2025	3535932	Kutak Rock LLP	legal thru January 2025	2,301.50		5,301.50
Bill	02/28/2025	3555050	Kutak Rock LLP	legal thru February 2025	2,772.50		8,074.00
Bill	03/31/2025	3555051	Kutak Rock LLP	legal (project construction) thru March 2025	660.00		8,734.00
Bill	06/30/2025	3584658	Kutak Rock LLP	legal thru April 2025	5,001.50		13,735.50
Bill	06/30/2025	3612133	Kutak Rock LLP	legal thru June 2025	3,583.95		17,319.45
Total 01-1315 · Legal Fees					17,319.45	0.00	17,319.45
01-1316 · Legal Extraordinary - Wall							
Bill	10/31/2024	25	Gurley Fant PA	Blue Lake CDD vs Lennar Homes thru 10/31/24	16,015.00		16,015.00
Bill	11/30/2024	110	Gurley Fant PA	Blue Lake CDD vs Lennar Homes thru 11/30/2024	2,260.00		18,275.00
Bill	12/31/2024	213	Gurley Fant PA	Blue Lake CDD vs Lennar Homes thru 12/31/2024	1,742.50		20,017.50
Bill	01/31/2025	293	Gurley Fant PA	Blue Lake CDD vs Lennar Homes thru 01/31/2025	5,463.50		25,481.00
Bill	02/28/2025	528	Gurley Fant PA	Blue Lake CDD vs Lennar Homes thru 04/03/2025	16,581.50		42,062.50
Bill	03/31/2025	586	Gurley Fant PA	Blue Lake CDD vs Lennar Homes thru March 2025	13,864.62		55,927.12
Bill	05/22/2025	723	Gurley Fant PA	Blue Lake CDD vs Lennar Homes thru April 2025	14,760.50		70,687.62
Bill	05/31/2025	818	Gurley Fant PA	Blue Lake CDD vs Lennar Homes thru May 2025	5,631.50		76,319.12
Bill	06/30/2025	983	Gurley Fant PA	Blue Lake CDD vs Lennar Homes thru June 2025	10,167.00		86,486.12
Bill	07/31/2025	1171	Gurley Fant PA	Blue Lake CDD vs Lennar Homes thru July 2025	7,722.40		94,208.52
Bill	08/31/2025	1292	Gurley Fant PA	Blue Lake CDD vs Lennar Homes thru August 2025	4,749.37		98,957.89
Total 01-1316 · Legal Extraordinary - Wall					98,957.89	0.00	98,957.89
01-1317 · Supervisor Fees							
General Journal	12/17/2024	PR 12/19/24		meeting date 11/12 & 12/10/24 check date 12/19/24 (...)	800.00		800.00
General Journal	01/31/2025	PR Jan 25		meeting date 1/11 & 1/28 check date 2/3/25 (Bello, ...)	800.00		1,600.00
General Journal	02/26/2025	PR 02-11-25		meeting date 02/11/25 check date 2/28/25 (Bello, R...	400.00		2,000.00
General Journal	03/17/2025	PR 03-11-25		meeting date 03/11/25 check date 03/19/25 (Bello, ...)	400.00		2,400.00
General Journal	04/24/2025	PR 4/8&22		meeting date 04/18/25& 4/22/25 check date 04/25/25...	1,000.00		3,400.00
General Journal	06/09/2025	PR 5/27/25		meeting date 5/27/25 check date 06/10/25 (Bello, R...	600.00		4,000.00
General Journal	06/17/2025	PR 06/10/25		meeting date 06/10/25 check date 06/20/25 (Bello, ...)	600.00		4,600.00
General Journal	07/28/2025	PR 07/22/25		meeting date 07/22/25 check date 07/29/25 (Bello, ...)	600.00		5,200.00
General Journal	08/21/2025	PR 08/12/25		meeting date 08/12/25 check date 08/25/25 (Bello, ...)	600.00		5,800.00
General Journal	09/15/2025	PR 09/09/25		meeting date 09/09/25 check date 09/17/25 (Bello, ...)	600.00		6,400.00
Total 01-1317 · Supervisor Fees					6,400.00	0.00	6,400.00
01-1318 · Assessment/Tax Roll							
Bill	09/29/2025	2025-1224	Special District Services Inc	Assessment Roll Preparation (per agreement) 2025	4,000.00		4,000.00
Total 01-1318 · Assessment/Tax Roll					4,000.00	0.00	4,000.00
01-1320 · Audit Fees							
Bill	06/01/2025	27386	Grau and Associates	2nd and final progress payment for FY 23/24 audit	2,300.00		2,300.00
Bill	06/01/2025	27135	Grau and Associates	1st progress payment for FY 23/24 audit	1,500.00		3,800.00
Total 01-1320 · Audit Fees					3,800.00	0.00	3,800.00

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Type	Date	Num	Name	Memo	Debit	Credit	Balance
01-1321 - Payroll processing fee							
General Journal	12/17/2024	PR 12/19/24		meeting date 11/12 & 12/10/24 check date 12/19/24 (...)	51.50		51.50
Check	12/31/2024		Paymaster	payroll set up fee	113.90		165.40
Check	01/30/2025		Paymaster	W2 processing fee	68.90		234.30
General Journal	01/31/2025	PR Jan 25		meeting date 1/11 & 1/28 check date 2/3/25 (Bello, ...)	51.50		285.80
General Journal	02/26/2025	PR 02-11-25		meeting date 02/11/25 check date 2/28/25 (Bello, R...	51.56		337.36
General Journal	03/17/2025	PR 03-11-25		meeting date 03/11/25 check date 03/19/25 (Bello, ...)	51.56		388.92
Check	03/31/2025		Paymaster	payroll fee	45.00		433.92
General Journal	04/24/2025	PR 4/8&22		meeting date 04/18/25& 4/22/25 check date 04/25/25...	52.34		486.26
General Journal	06/09/2025	PR 5/27/25		meeting date 5/27/25 check date 06/10/25 (Bello, R...	52.34		538.60
General Journal	06/17/2025	PR 06/10/25		meeting date 06/10/25 check date 06/20/25 (Bello, ...)	52.34		590.94
General Journal	07/28/2025	PR 07/22/25		meeting date 07/22/25 check date 07/29/25 (Bello, ...)	52.34		643.28
General Journal	08/21/2025	PR 08/12/25		meeting date 08/12/25 check date 08/25/25 (Bello, ...)	52.34		695.62
General Journal	09/15/2025	PR 09/09/25		meeting date 09/09/25 check date 09/17/25 (Bello, ...)	52.34		747.96
Total 01-1321 - Payroll processing fee					747.96	0.00	747.96
01-1322 - Payroll Tax Expense							
General Journal	12/17/2024	PR 12/19/24		meeting date 11/12 & 12/10/24 check date 12/19/24 ...	61.20		61.20
General Journal	01/31/2025	PR Jan 25		meeting date 1/11 & 1/28 check date 2/3/25 (Bello, ...)	61.20		122.40
General Journal	02/26/2025	PR 02-11-25		meeting date 02/11/25 check date 2/28/25 (Bello, R...	30.60		153.00
General Journal	03/17/2025	PR 03-11-25		meeting date 03/11/25 check date 03/19/25 (Bello, ...)	30.60		183.60
General Journal	04/24/2025	PR 4/8&22		meeting date 04/18/25& 4/22/25 check date 04/25/25...	76.50		260.10
General Journal	06/09/2025	PR 5/27/25		meeting date 5/27/25 check date 06/10/25 (Bello, R...	45.90		306.00
General Journal	06/17/2025	PR 06/10/25		meeting date 06/10/25 check date 06/20/25 (Bello, ...)	45.90		351.90
General Journal	07/28/2025	PR 07/22/25		meeting date 07/22/25 check date 07/29/25 (Bello, ...)	45.90		397.80
General Journal	08/21/2025	PR 08/12/25		meeting date 08/12/25 check date 08/25/25 (Bello, ...)	45.90		443.70
General Journal	09/15/2025	PR 09/09/25		meeting date 09/09/25 check date 09/17/25 (Bello, ...)	45.90		489.60
Total 01-1322 - Payroll Tax Expense					489.60	0.00	489.60
01-1324 - Engineering - Extraord - Wall							
Bill	11/01/2024	retainer	Taylor Engineering Inc.	retainer	25,000.00		25,000.00
Bill	11/30/2024	26240	Taylor Engineering Inc.	Professional Services for the Period November 13, 2...	2,906.75		27,906.75
Bill	12/31/2024	26304	Taylor Engineering Inc.	Professional Services for the Period December 01, 2...	11,199.63		39,106.38
Bill	01/31/2025	26426	Taylor Engineering Inc.	Professional Services for the Period January 01, 202...	11,917.40		51,023.78
Bill	02/28/2025	26499	Taylor Engineering Inc.	Professional Services for the Period February 01, 20...	25,613.86		76,637.64
Bill	05/12/2025	26694	Taylor Engineering Inc.	Professional Services for April 2025 (bulkhead retain...	481.36		77,119.00
Bill	06/30/2025	26904	Taylor Engineering Inc.	Professional Services for June 2025 (bulkhead retai...	1,880.00		78,999.00
Total 01-1324 - Engineering - Extraord - Wall					78,999.00	0.00	78,999.00
01-1330 - Arbitrage Rebate Fee							
Bill	07/03/2025	003814	LLS Tax Solutions Inc	arbitrage rebate calc report Series 2019 bond	650.00		650.00
Total 01-1330 - Arbitrage Rebate Fee					650.00	0.00	650.00
01-1450 - Insurance							
Bill	10/01/2024	25258	Egis Insurance & Risk Advisors	policy# 100124395 10/1/24-10/1/25	12,850.00		12,850.00
Total 01-1450 - Insurance					12,850.00	0.00	12,850.00
01-1480 - Legal Advertisements							
Bill	10/31/2024	0006747992	Gannett Florida LocalIQ	Notice of LO Mtg & Reg Board Mtg	741.50		741.50
Bill	12/31/2024	0006882440	Gannett Florida LocalIQ	Notice of Reg Board Mtg	268.56		1,010.06
Bill	01/31/2025	0006933442	Gannett Florida LocalIQ	REVISED FY 24/25 Mtg Schedule	370.48		1,380.54
Bill	02/28/2025	0006986124	Gannett Florida LocalIQ	Notice of Reg Board Mtgs of 02/11/25 & 02/25/25	245.04		1,625.58
Bill	03/31/2025	0007039243	Gannett Florida LocalIQ	Notice March Board Meetings (03/11/25 & 03/25/25	245.04		1,870.62

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Profit & Loss Detail
October 2024 through September 2025

Type	Date	Nu m	Name	Memo	Debit	Credit	Balance
Bill	03/31/2025	0007039243	Gannett Florida LocaliQ	Notice of April Board Meeting (04/08/25 & 04/22/25	245.04		2,115.66
Bill	05/31/2025	0007144651	Gannett Florida LocaliQ	Notice March Board Meetings (03/11/25 & 03/25/25	268.56		2,384.22
Bill	06/30/2025	0007198906	Gannett Florida LocaliQ	Notice of June Board Mtgs (06/10/25 & 06/24/25)	243.04		2,627.26
Bill	07/31/2025	0007251356	Gannett Florida LocaliQ	Notice of Reg Board Mtg	245.04		2,872.30
Bill	07/31/2025	0007251356	Gannett Florida LocaliQ	Notice of PH & Reg Board Mtg & Aug Mtgs	647.25		3,519.55
Bill	08/31/2025	0007300873	Gannett Florida LocaliQ	Notice of Reg Board Mtg	256.80		3,776.35
Total 01-1480 · Legal Advertisements					3,776.35	0.00	3,776.35
01-1511 · Bank Service Charges							
Check	10/1/2024			Service Charge	16.97		16.97
Deposit	06/12/2025			service charge refund 10/24		16.07	0.90
Total 01-1511 · Bank Service Charges					16.97	16.07	0.90
01-1512 · Miscellaneous							
Bill	10/31/2024	2024-1475	Special District Services Inc	conference calls	634.45		634.45
Bill	10/31/2024	2024-1475	Special District Services Inc	travel	58.29		692.74
Bill	12/31/2024	2024-1836	Special District Services Inc	conference calls	304.31		997.05
Bill	12/31/2024	2024-1836	Special District Services Inc	travel	58.29		1,055.34
Bill	01/31/2025	2025-0078	Special District Services Inc	travel	58.29		1,113.63
Bill	02/28/2025	2025-0193	Special District Services Inc	travel	121.80		1,235.43
Bill	03/31/2025	2025-0320	Special District Services Inc	travel	60.90		1,296.33
Bill	03/31/2025	2025-0320	Special District Services Inc	conference calls	36.51		1,332.84
Bill	04/30/2025	2025-0452	Special District Services Inc	travel	60.90		1,393.74
Bill	04/30/2025	2025-0452	Special District Services Inc	conference calls	50.09		1,443.83
Bill	05/31/2025	2025-0696	Special District Services Inc	travel	136.50		1,580.33
Bill	05/31/2025	2025-0696	Special District Services Inc	conference calls	92.86		1,673.19
Bill	06/30/2025	2025-0819	Special District Services Inc	travel	60.90		1,734.09
Bill	06/30/2025	2025-0819	Special District Services Inc	conference calls	52.92		1,787.01
Bill	07/31/2025	2025-0940	Special District Services Inc	travel	60.90		1,847.91
Bill	07/31/2025	2025-0940	Special District Services Inc	conference calls	28.52		1,876.43
Bill	08/31/2025	2025-1057	Special District Services Inc	travel	60.90		1,937.33
Bill	08/31/2025	2025-1057	Special District Services Inc	conference calls	79.61		2,016.94
Bill	08/31/2025	2025-1057	Special District Services Inc	mailouts	90.00		2,106.94
Bill	09/30/2025	2025-1175	Special District Services Inc	travel	60.90		2,167.84
Bill	09/30/2025	2025-1175	Special District Services Inc	conference calls	108.13		2,275.97
Total 01-1512 · Miscellaneous					2,275.97	0.00	2,275.97
01-1513 · Postage and Delivery							
Bill	10/31/2024	2024-1475	Special District Services Inc	FedEx charges	58.16		58.16
Bill	11/30/2024	2024-1608	Special District Services Inc	FedEx charges	17.56		75.72
Bill	12/31/2024	2024-1836	Special District Services Inc	FedEx charges	47.69		123.41
Bill	01/31/2025	2025-0078	Special District Services Inc	FedEx charges	53.00		176.41
Bill	02/28/2025	2025-0193	Special District Services Inc	FedEx charges	74.18		250.59
Bill	02/28/2025	2025-0193	Special District Services Inc	postage	4.14		254.73
Bill	03/31/2025	2025-0320	Special District Services Inc	FedEx charges	31.04		285.77
Bill	04/30/2025	2025-0452	Special District Services Inc	FedEx charges	27.76		313.53
Bill	05/31/2025	2025-0696	Special District Services Inc	FedEx charges	107.86		421.39
Bill	06/30/2025	2025-0819	Special District Services Inc	FedEx charges	36.15		457.54
Bill	07/31/2025	2025-0940	Special District Services Inc	FedEx charges	42.49		500.03
Bill	08/31/2025	2025-1057	Special District Services Inc	postage	602.50		1,102.53
Bill	09/30/2025	2025-1175	Special District Services Inc	postage	0.74		1,103.27
Bill	09/30/2025	2025-1175	Special District Services Inc	FedEx	58.30		1,161.57
Total 01-1513 · Postage and Delivery					1,161.57	0.00	1,161.57

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Type	Date	Num	Name	Memo	Debit	Credit	Balance
01-1514 · Office Supplies							
Bill	10/31/2024	2024-1475	Special District Services Inc	copier charges	55.80		55.80
Bill	10/31/2024	2024-1475	Special District Services Inc	meeting books	40.00		95.80
Bill	11/30/2024	2024-1608	Special District Services Inc	copier charges	39.75		135.55
Bill	11/30/2024	2024-1608	Special District Services Inc	meeting books	44.00		179.55
Bill	12/31/2024	2024-1836	Special District Services Inc	copier charges	217.35		396.90
Bill	12/31/2024	2024-1836	Special District Services Inc	meeting books	104.00		500.90
Bill	01/31/2025	2025-0078	Special District Services Inc	copier charges	55.20		556.10
Bill	02/28/2025	2025-0193	Special District Services Inc	copier charges	118.50		674.60
Bill	02/28/2025	2025-0193	Special District Services Inc	meeting books	140.00		814.60
Bill	03/31/2025	2025-0320	Special District Services Inc	copier charges	45.90		860.50
Bill	03/31/2025	2025-0320	Special District Services Inc	meeting books	64.00		924.50
Bill	04/30/2025	2025-0452	Special District Services Inc	copier charges	55.20		979.70
Bill	04/30/2025	2025-0452	Special District Services Inc	meeting books	28.00		1,007.70
Bill	05/31/2025	2025-0696	Special District Services Inc	copier charges	47.55		1,055.25
Bill	05/31/2025	2025-0696	Special District Services Inc	meeting books	64.00		1,119.25
Bill	05/31/2025	2025-0696	Special District Services Inc	check order	181.99		1,301.24
Bill	06/30/2025	2025-0819	Special District Services Inc	copier charges	71.70		1,372.94
Bill	06/30/2025	2025-0819	Special District Services Inc	meeting books	36.00		1,408.94
Bill	07/31/2025	2025-0940	Special District Services Inc	copier charges	9.45		1,418.39
Bill	07/31/2025	2025-0940	Special District Services Inc	meeting books	32.00		1,450.39
Bill	08/31/2025	2025-1057	Special District Services Inc	copier charges	274.80		1,725.19
Bill	08/31/2025	2025-1057	Special District Services Inc	meeting books	40.00		1,765.19
Bill	09/30/2025	2025-1175	Special District Services Inc	copier charges	63.90		1,829.09
Total 01-1514 · Office Supplies					1,829.09	0.00	1,829.09
01-1540 · Dues, License & Subscriptions							
Bill	10/01/2024	91351	Florida Commerce	special district fee FY 2024-2025	175.00		175.00
Total 01-1540 · Dues, License & Subscriptions					175.00	0.00	175.00
01-1550 · Trustee Fees (GF)							
Bill	05/23/2025	7762049	U.S. Bank (trustee fees)	trustee fee Series 2019 (5/1/25-4/30/26)	4,246.25		4,246.25
Total 01-1550 · Trustee Fees (GF)					4,246.25	0.00	4,246.25
01-1743 · Continuing Disclosure Fee							
Bill	09/28/2025	2025-1315	Special District Services Inc	Continuing Disclosure Fee - Fiscal Year 2024/2025	350.00		350.00
Total 01-1743 · Continuing Disclosure Fee					350.00	0.00	350.00
01-1807 · Lake Maintenance							
Bill	10/01/2024	PS1112665	Solitude Lake Management	Lake All Oct 2024	2,782.25		2,782.25
Bill	10/31/2024	577	Fernandos Grading & Site Work LLLC	rebuild berm	4,637.00		7,419.25
Bill	10/31/2024	576	Fernandos Grading & Site Work LLLC	install fabric cloth & riprap	4,450.00		11,869.25
Bill	11/01/2024	PS1120486	Solitude Lake Management	Lake Maintenance Nov 2024	2,782.25		14,651.50
Bill	12/01/2024	PS1127222	Solitude Lake Management	Lake Maintenance December 2024	2,782.25		17,433.75
Bill	01/01/2025	PS1133860	Solitude Lake Management	Lake Maintenance January 2025	2,782.25		20,216.00
Bill	02/02/2025	PS1145644	Solitude Lake Management	Lake Maintenance February 2025	2,865.79		23,081.79
Bill	03/02/2025	PS1152044	Solitude Lake Management	Lake Maintenance March 2025	2,865.72		25,947.51
Bill	04/01/2025	PS1159484	Solitude Lake Management	Lake Maintenance April 2025	2,865.72		28,813.23
Bill	05/02/2025	PS1167285	Solitude Lake Management	lake Maintenance May 2025	2,865.72		31,678.95
Bill	06/02/2025	PS1175575	Solitude Lake Management	Lake Maintenance June 2025	2,865.72		34,544.67
Bill	07/01/2025	PS1183780	Solitude Lake Management	Lake Maintenance July 2025	2,865.72		37,410.39
Bill	07/01/2025	PS1180561	Solitude Lake Management	fence July 2025	2,054.00		39,464.39
Bill	08/01/2025	PS1192031	Solitude Lake Management	Lake maintenance August 2025	2,865.72		42,330.11

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Type	Date	Num	Name	Memo	Debit	Credit	Balance
Bill	09/01/2025	PSI200177	Solitude Lake Management	lake maintenance September 2025	2,895.72		45,195.83
Total 01-1807 · Lake Maintenance					45,195.83	0.00	45,195.83
01-1815 · Miscellaneous Maintenance							
Bill	10/02/2024	PSI117119	Solitude Lake Management	Fence Maintenance Oct 2024	2,054.00		2,054.00
Bill	01/01/2025	PSI137373	Solitude Lake Management	fence maintenance January 2025	2,054.00		4,108.00
Bill	04/01/2025	PSI156571	Solitude Lake Management	fence Maintenance April 2025	2,054.00		6,162.00
Bill	05/31/2025	25313	Cummins Cederberg Inc.	shoreline stabilization thru 5/31/25	4,110.00		10,272.00
Bill	05/31/2025	25313	Cummins Cederberg Inc.	shoreline stabilization thru Oct 1 , 2024- May 31, 2025	4,110.00		14,382.00
Bill	06/04/2025	2306	Crockor Land Development LLC	fixing damaged seawall gap	13,175.00		27,557.00
Bill	06/30/2025	25436	Cummins Cederberg Inc.	shoreline stabilization thru 06/30/2025	6,165.00		33,722.00
Bill	06/30/2025	25436	Cummins Cederberg Inc.	shoreline stabilization June 2025	6,165.00		39,887.00
Bill	07/31/2025	25566	Cummins Cederberg Inc.	shoreline stabilization thru July 2025	10,275.00		50,162.00
Bill	08/31/2025	25721	Cummins Cederberg Inc.	shoreline stabilization August 2025	4,110.00		54,272.00
Bill	09/30/2025	25836	Cummins Cederberg Inc.	shoreline stabilization September 2025	8,220.00		62,492.00
Total 01-1815 · Miscellaneous Maintenance					62,492.00	0.00	62,492.00
01-1816 · Detention Area Maintenance							
Bill	10/01/2024	PSI113529	Solitude Lake Management	detention areas Oct 2024	2,895.49		2,895.49
Bill	11/01/2024	PSI121270	Solitude Lake Management	Detention area Maintenance Nov 2024	2,895.49		5,790.98
Bill	12/01/2024	PSI128041	Solitude Lake Management	Detention area Maintenance December 2024	2,895.49		8,686.47
Bill	01/01/2025	PSI134574	Solitude Lake Management	Detention areas January 2025	2,895.49		11,581.96
Bill	02/01/2025	PSI140487	Solitude Lake Management	Detention Area Maintenance February 2025	2,895.49		14,477.45
Bill	03/01/2025	PSI146649	Solitude Lake Management	Detention Area Maintenance March 2025	2,895.49		17,372.94
Bill	04/02/2025	PSI160654	Solitude Lake Management	Detention Areas - ALL April	3,011.31		20,384.25
Bill	05/02/2025	PSI168466	Solitude Lake Management	detention area Maintenance May 2025	3,011.31		23,395.56
Bill	06/02/2025	PSI176687	Solitude Lake Management	detention area Maintenance June 2025	3,011.31		26,406.87
Bill	07/01/2025	PSI184941	Solitude Lake Management	Detention area July 2025	3,011.31		29,418.18
Bill	08/01/2025	PSI193183	Solitude Lake Management	detention area maintenance August 2025	3,011.31		32,429.49
Bill	09/01/2025	PSI201355	Solitude Lake Management	detention area maintenance September 2025	3,011.31		35,440.80
Total 01-1816 · Detention Area Maintenance					35,440.80	0.00	35,440.80
01-1817 · Vista Dry Retention Area							
Bill	11/05/2024	6827	Woods and Wetlands, Inc.	tree removal	3,900.00		3,900.00
Total 01-1817 · Vista Dry Retention Area					3,900.00	0.00	3,900.00
01-3222 · Construction Costs							
Bill	09/23/2025	30104	Barraco and Associates Inc	Miscellaneous Professional Services	25,550.00		25,550.00
Total 01-3222 · Construction Costs					25,550.00	0.00	25,550.00
Total Expense					702,803.56	16.07	702,787.49
Net Ordinary Income					1,386,728.76	1,253,466.25	-133,262.51
Other Income/Expense							
Other Income							
01-3101 · Line of Credit proceeds							
General Journal	04/08/2025			transfer to deposit account from line of credit	0.00	122,100.00	0.00
Deposit	04/08/2025			transfer to deposit account from line of credit			122,100.00
Total 01-3101 · Line of Credit proceeds					0.00	122,100.00	122,100.00
Total Other Income					0.00	122,100.00	122,100.00

Type	Date	Num	Name	Memo	Debit	Credit	Balance
Other Expense							
01-3000 · Capital Outlay - Lake Bank Exp							
Credit Card Ch...	04/08/2025			Seacoast LOC fees	5,050.00		5,050.00
Credit Card Ch...	04/08/2025		Moore & Van Allen PLLC	legal fees for LOC	6,250.00		11,300.00
General Journal	04/08/2025			transfer to deposit account from line of credit	0.00		11,300.00
General Journal	04/08/2025			transfer to deposit account from line of credit	122,100.00		133,400.00
Total 01-3000 · Capital Outlay - Lake Bank Exp					133,400.00	0.00	133,400.00
Total Other Expense					133,400.00	0.00	133,400.00
Net Other Income					133,400.00	122,100.00	-11,300.00
Net Income					1,520,128.76	1,375,566.25	-144,562.51

DALE A. BRAZDIS
13696 Blue Bay Circle
Fort Myers, Florida 33913
Cell: (805) 863-3608
dbrazdis@gmail.com

SUMMARY

Senior merchandising and procurement executive with established reputation as a leader in the supermarket industry. In-depth hands-on knowledge of produce, meat, seafood, service deli, food service, bakery and basic perishable merchandising. Expertise includes win-win negotiations, analysis, and development of productive relationships that result in cost efficiencies. Skilled and experienced in turning around poorly performing operations into profitable businesses. Possess balanced drive between innovation and analysis.

PROFESSIONAL EXPERIENCE

GELSON'S MARKETS INC. Encino, California.

- Senior Vice President of Perishables

- Vice President of Meat, Seafood and Service Deli
- Executive Director of Meat & Seafood

2009 to Retirement

BOZZUTO'S INC, Cheshire, CT.

2006-2009

-Vice President of Meat and Seafood Sales and Procurement (January 2006 to 2009)

AHOLD USA, Boston, MA.

1996-2006

-Vice President of Central Meat Procurement for Ahold USA (2001-2006)

Directly Responsible for Central Meat Procurement for Ahold USA retail supermarket chains. (BiLo, Bruno's Supermarkets, Giant Foods, Tops Markets Giant Foods Landover, Stop & Shop Supermarkets, US Food Service). Developed from ground level a Central Meat Procurement department for Ahold USA. Oversaw all meat department procurement for eight distribution centers, six retail companies with 2,600 retail supermarkets and 86 divisions of US Food Service.

AHOLD, USA/ STOP & SHOP INC. Boston, MA.

-Vice President, Perishable Sales, Merchandising and Procurement – Stop & Shop Inc. Boston, MA. (2000-2001)

Responsible for the merchandising, sales, marketing, merchandising, financials, product development, advertising and procurement for meat, seafood, sushi, deli, food service and bakery departments for Stop & Shop Inc. (364 Stores)

-Vice President of Meat, Seafood Sales and Procurement – Stop & Shop Inc. Boston, MA. (1996-2000)

Managed all merchandising, procurement, marketing, sales, and financials for all Stop & Shop Meat and Seafood Departments. Annual meat and seafood sales \$1.25 Billion.

HARRIS TEETER SUPERMARKET COMPANY, Charlotte, NC.

1993-1996

-Manager of Meat & Seafood Sales and Procurement

Oversaw all meat and seafood merchandising department functions that Included financials, merchandising, advertising, marketing, product development and procurement for Harris Teeter, Inc. stores.

GIANT EAGLE INC, Pittsburgh, PA.

1973-1993

-Director of Meat & Seafood Merchandising and Procurement

Directed all Meat, Seafood, Gourmet Shops, Hot Foods and Smokehouse Merchandising department functions that included all financials, merchandising, advertising, marketing and procurement for 145 Giant Eagle supermarkets.

PROFESSIONAL AFFILIATIONS

- Certified Angus Beef Executive Advisory Board
- Member of FMI Meat Advisory Committee
- PMG Consulting Retail Advisory Council
- National Pork Board Retail Advisory Council / Chairman.
- Sara Lee Corporation Retail Advisory Board.
- Professional Association of Scuba Diving Instructors

EDUCATION & PROFESSIONAL DEVELOPMENT

- Slippery Rock State University, Slippery Rock, PA
- Cornell University, Ithaca, NY. Executive Master's Program,
- Johnson & Wales University, Charleston, SC, Executive Culinary Program
- AMI Meat Courses, University of Georgia, Athens, GA.
- Quality College, Philip Crosby Associates, Quality Improvement Process Management
- Certified Scuba Diving Instructor, YMCA, PADI
Certified 3000+ students over 26 years as instructor.

AWARDS

2002 - *Progressive Grocer* Magazine-Most Valuable Buyer-Executive
(National industry publication)

2001 - Awarded top individual performance award for sales and profit for Stop & Shop Inc. Grappa Award.

Edward M. Garry

646.642.6178 | edwardmgarry@gmail.com | [linkedin.com/in/edward-garry-salesenablementcrm](https://www.linkedin.com/in/edward-garry-salesenablementcrm)

CAREER SUMMARY

- **Executive CRM Business Strategy Leader with 20+ years of experience driving revenue growth, digital transformation, and enterprise-wide customer engagement through data-driven strategies, scalable platforms, and cross-functional leadership.**
- **Spearheaded digital and self-service initiatives that included VoC-informed UX improvements, self-help video tutorials, resulting in a 7% call reduction and \$500K in annual savings.**
- **Executed a Salesforce Marketing Cloud contact cleanup initiative in under 30 days, generating \$400K+ in annual savings through improved data quality and campaign efficiency.**
- **Designed and delivered a trilogy of sales enablement tools and executive dashboards used by 1.5K+ professionals, supporting \$1.25B in pipeline tracking, \$1B in closed-won reporting, and \$450M+ in asset retention.**
- **Delivered advanced reporting and competitive analysis tools used across B2B business units, driving informed decision-making through state-of-the-art analytics on \$1B+ in pipeline, employee sales effectiveness, goal attainment, and market positioning.**
- **Recognized by the founder of the CRM platform as having built “the best CRM system” they had seen globally, following a company-wide deployment at Quick & Reilly that set a new benchmark for enterprise CRM excellence.**

CORE COMPETENCIES

- Salesforce Financial Services Cloud
- CRM Strategy & Execution
- Call Center Technology Optimization
- Digital Transformation & Analytics
- Voice of the Customer (VoC) Initiatives
- Sales & Marketing Automation / Revenue Growth
- Regulatory Compliance Alignment
- Client Lifecycle Management
- Go-to-Market Strategy & Enablement
- Cross-Functional & Executive Collaboration
- Top-Performance Team Building
- Customer Experience Certified
- Stakeholder Engagement/Board Communication
- Change Management
- Artificial Intelligence (AI) Certified

PROFESSIONAL WORK EXPERIENCE

INSPIRA FINANCIAL, INC

Senior Director, Call Center & Operations Technology

2025

- Oversaw a 40-person team while owning business strategy for Call Center and Operations Technology, aligning cross-functional policies and solutions to optimize customer experience.
- Led a comprehensive audit of contact center technologies (chat, phone, CRM, IVR), identifying 140+ friction points and root causes, including poor website usability, driving inbound volume.
- Spearheaded digital and self-service initiatives that included VoC-informed UX improvements, self-help video tutorials, resulting in a 7% call reduction and \$500K in annual savings.
- Established new security and self-service strategies that enhanced customer experience, reduced operational overhead, and supported long-term digital transformation objectives.

Senior Director, Business & Technology Strategy

2022 – 2025

- Led the redesign and enterprise-wide revamp of the Salesforce CRM platform across sales, service, marketing, and operations, including a full-scale migration to Salesforce Financial Services Cloud in partnership with external consultants over 18 months.
- Mapped 150+ current and future state business processes to enable operational excellence, standardization, and scalable, tech-driven transformation, earning a 4.7/5 performance rating.
- Reconstructed the customer sales journey and lead intake process, establishing a companywide pipeline tracking system and a single source of truth for marketing leads across all business units.
- Developed and delivered robust CRM solutions for Health & Benefits and Retirement Services, enhancing cross-functional engagement and data visibility for 300+ sales and service professionals.
- Designed CRM analytics and forecasting dashboards that standardized the sales process, enabling leadership to pivot strategies based on real-time data, align top-performing resources to the most profitable opportunities, and empower sales, service, and marketing teams to optimize performance and enhance customer experience.
- Executed a Salesforce Marketing Cloud contact cleanup initiative in under 30 days, generating \$400K+ in annual savings through improved data quality and campaign efficiency.

HURON CONSULTING GROUP

Senior Director, Business Owner of Salesforce Consulting Practice, Financial Services

2020 – 2022

- Built and executed the CRM go-to-market strategy for Huron Consulting's Financial Services vertical, generating \$2.6M in new revenue, building a \$14M+ pipeline, and exceeding year-1 revenue targets by 20%.

- Served as Global Practice Lead and Sales Strategy Lead, driving new client acquisition, cross-functional sales alignment, and business development across financial services, banking, wealth, and asset management.
- Developed Salesforce demos, sales enablement content, and engagement toolkits while forging strategic technology partnerships to enhance field performance and accelerate pipeline growth.
- Created and executed integrated marketing strategies, including events, podcasts, and thought leadership, that elevated brand visibility and fueled multi-vertical business expansion through 2022.

COGNIZANT TECHNOLOGY SOLUTIONS

AVP, Business Owner of Salesforce Consulting Practice, Financial Services

2018 – 2020

- Led go-to-market strategy and developed a 4-pronged marketing plan for Cognizant's Banking and Financial Services (BFS) vertical, securing \$6M+ in new bookings and \$18M in revenue through successful delivery, client satisfaction, and P&L management.
- Drove Salesforce.com strategy and CRM optimization initiatives across North America as engagement lead, driving increased user adoption, enhanced pipeline visibility, integrated analytics and marketing functions, and improved data quality, resulting in stronger revenue forecasting and measurable gains for client organizations.
- Expanded sub-vertical market presence across Capital Markets, Asset Management, and Investment Banking, while forging strategic partnerships that accelerated client acquisition and Salesforce-driven transformation.
- Elevated client engagement and solution alignment by tailoring GTM strategies to BFS/FSI needs, strengthening long-term account value and uncovering new revenue opportunities across the Salesforce product suite.

BNY MELLON

Managing Director, Strategic Sales & CRM Enablement

2010 – 2018

- Directed a global team of 45 and led strategy for Salesforce, Tableau, and Marketo platforms supporting 4K+ client-facing users, enabling over \$1B in annual sales and increasing CRM adoption by 73%.
- Designed and delivered a trilogy of sales enablement tools and executive dashboards used by 1.5K+ professionals, supporting \$1.25B in pipeline tracking, \$1B in closed-won reporting, and \$450M+ in asset retention.
- Integrated external market intelligence, competitor data, and social selling tools to enhance account planning, improve client targeting, and generate \$450M in new pipeline and ~\$100M in potential new revenue.
- Developed and formalized a sales management review process for the President, CEO, and Executive Committee, driving strategic decision-making and transforming enterprise-level sales reporting.
- Aligned digital marketing, lead management, and CRM systems through an agile development model, delivering hundreds of enhancements annually and improving sales effectiveness and data accuracy.
- Increased client retention from 70% to 89% over 3 years and protected \$459M in at-risk business by implementing a structured review process across 5 strategic market segments.

Vice President, Business Intelligence

2008 – 2010

- Led global BI strategy as business sponsor and product owner for BNY Mellon's enterprise-wide sales intelligence platform, supporting 10 business lines across 35+ countries and enabling a data-driven culture through 150+ dashboards for pipeline tracking, sales forecasting, and performance measurement.
- Delivered advanced reporting and competitive analysis tools used across B2B business units, driving informed decision-making through state-of-the-art analytics on \$1B+ in pipeline, employee sales effectiveness, goal attainment, and market positioning.

ORACLE / SIEBEL SYSTEMS

Vice President & GM, Institutional Finance Worldwide

2004 – 2008

- Led Oracle's global Capital Markets and Investment Banking vertical as business sponsor, driving strategy, product development, marketing, and cross-vertical CRM solutions targeting a \$21B market, resulting in \$80M+ in annual revenue.
- Directed data-driven marketing initiatives that increased lead generation by 50%, while serving as the voice of the customer across engineering, product, and professional services to ensure alignment with financial industry needs.

ADDITIONAL RELEVANT EXPERIENCE: Multiple Roles – Quick & Reilly | Bank of America

EDUCATION & CERTIFICATIONS

St Bonaventure University – Bachelor of Science, Business Administration

Wharton School of Business – Executive Presence & Leadership Certification | Columbia University – Customer Experience Strategies Certification

Six Sigma Green Belt | Executive Black Belt | Series 7 and Series 63 (Inactive)

Coursiv - Artificial Intelligence/ChatGPT Certification Completed (2025)



Edward (Ed) Garry

CRM & Financial Services Leader | Strategic Consultant | Data-Driven Innovator

Professional Snapshot

With nearly 30 years of leadership in Financial Services, I specialize in CRM strategy, client experience, operations, and analytics. My career spans top-tier institutions including BNY Mellon, Bank of America Securities, Huron Consulting Group, and Inspira Financial. I've led enterprise-wide transformations that consistently drive client satisfaction, revenue growth, and operational efficiency.

What Sets Me Apart

- **Strategic Leadership** Visionary thinker with a track record of building actionable roadmaps that align people, process, and technology.
- **CRM & Process Transformation** Led Inspira Financial's enterprise-wide CRM rebuild, streamlining workflows and reducing operating costs by 30%.
- **Cross-Functional Impact** Secured funding and modernized sales enablement technology at BNY Mellon, delivering measurable revenue growth.
- **Data & Analytics Enablement** Spearheaded CRM and analytics initiatives at Quick & Reilly, enhancing transparency and client responsiveness.

Core Strengths

- **Executive Presence** Strong communicator with the ability to connect authentically across all organizational levels.
- **People-Centric Leadership** Collaborative team builder who fosters enthusiasm and high performance.
- **High-Energy Connector** Outgoing and optimistic, with a storytelling style that builds trust and inspires confidence.
- **Balanced Perspective** Open to innovation, blending intuition and data to drive smart decision-making.

AREAS OF EXPERTISE

- ❖ Productive and Entrepreneurial Leader of global High Performing Drug Development and Regulatory Teams with numerous results (successful original or supplemental marketing application approvals).
- ❖ Strategic, innovative, and creative thinker with diverse analytical skills, quick learner, adaptive, ethical, flexible.
- ❖ Deep knowledge of many therapeutic areas including oncology, cardio-renal, pulmonary, and others.
- ❖ Skilled strategic collaborator and partner with diverse groups and companies with focus on optimal product development, patient advocacy, regulatory research actions and enhanced marketing utilization.
- ❖ Established relationships with health authorities (e.g., in US, Europe, Japan), Patient Advocacy groups and trade organizations (e.g., BIO, PhRMA) with a record of many major accomplishments including Policy and laws.
- ❖ Numerous leadership achievements with multi-task capacity and close multi-functional internal collaborations.
- ❖ Significant hands-on involvement in biologic and drug product development and business development including effective relationships with multiple external co-development partners.

SELECTED ACCOMPLISHMENTS

SENIOR VICE PRESIDENT AND HEAD. REGULATORY AFFAIRS AND QUALITY ASSURANCE
Oncternal Therapeutics, Inc.

- ◆ Led Global Regulatory Strategy efforts for portfolio of chemotherapy products.
- ◆ Primary author of numerous documents (e.g., INDs, Orphan Drug Designation, meeting requests, protocols).
- ◆ Oversight GXP, vendor audits, investigations/deviations/CAPAs generation and resolution.

VICE PRESIDENT AND HEAD. REGULATORY AFFAIRS
Checkmate Pharmaceuticals, Inc. (acquired by Regeneron)

- ◆ Primary author of numerous documents (e.g., Fast Track, Orphan Drug Designation, meeting requests).
- ◆ Provided in-depth Global Regulatory Strategy efforts for immune-oncology product.

VICE PRESIDENT AND HEAD. REGULATORY AFFAIRS AND QUALITY ASSURANCE
Tarveda Therapeutics, Inc.

- ◆ Led Global Regulatory Strategy efforts for portfolio of two Phase 2 chemotherapy products.
- ◆ Primary author of numerous documents (e.g., Fast Track, Orphan Drug Designation, meeting requests).
- ◆ Oversight GXP, vendor audits, investigations/deviations/CAPAs generation and resolution.

VICE PRESIDENT. REGULATORY AFFAIRS, ONCOLOGY AND BIOSIMILARS THERAPEUTIC AREAS
Baxalta (acquired by Shire; formerly Baxter)

- ◆ Led Global Regulatory Strategy Group for portfolio of chemotherapies achieving multiple marketing approvals.
- ◆ Core member of the Oncology Leadership Team and involved in external Policy.
- ◆ Close collaboration with Commercial Medical Affairs, Corporate/Oncology Communications, and Market Access.
- ◆ Significant business development involvement including successful in-licensing and close partnership relationship.

GROUP VICE PRESIDENT. REGULATORY AFFAIRS AND QUALITY ASSURANCE
Savient Pharmaceuticals, Inc. (acquired by Horizon Pharmaceuticals)

- ◆ Provided overall regulatory strategy for product with significant clinical and CMC issues, successful implementation.
- ◆ Primary author of key clinical summaries and REMS documents, Prescribing Information, and Medication Guide/Patients Leaflet. KRYSTEXXA BLA approval (FDA: September 2010) and MAA validation (EMA: May 2011).

VICE PRESIDENT AND COMPOUND DEVELOPMENT TEAM LEADER, ONCOLOGY AND HEMATOLOGY
Johnson & Johnson Pharmaceutical Research and Development, Raritan, NJ

- ◆ Led cross-functional teams that delivered quality results for different topics and tasks; worked closely with Legal and Compliance related to unanticipated (safety) concerns raised by health authorities, Congress, and prescribers.
- ◆ Effectively managed a multi-million-dollar Product Team budget within a small variance and ensured appropriate resources were trained, optimally utilized, and engaged for major drug to company profit; coordinated globally.
- ◆ Head of Oncology and GI Regulatory Affairs: Major contributor to multi-functional strategy.

PROFESSIONAL EXPERIENCE

ONCTERNAL THERAPEUTICS, INC; SAN DIEGO, CA 2021 – 2023

Senior Vice President, REGULATORY AFFAIRS AND QUALITY ASSURANCE

- ◆ Provided strategic guidance for a successful End-of Phase 2 meeting with FDA
- ◆ Focused on biologic products (monoclonal antibodies, cell therapy) for patients with cancer
- ◆ Wrote and reviewed multiple drug development, clinical and regulatory SOPs and documents
- ◆ Member of Executive Team

DRUG DEVELOPMENT CONSULTANTS, LLC; REMOTE (can travel globally) 2020 – 2021; 2023 - Current

Founder, Head and Key Contributor

- ◆ Provide strategic guidance for clinical, non-clinical and manufacturing
- ◆ Focus included gene therapy for patients with cancer and global health authority meetings
- ◆ Author and reviewer of multiple drug development, clinical and regulatory SOPs
- ◆ Key member of Legal, Medical and Regulatory Promotional Materials Review Committee, prescription/vial/carton label development and Orphan Drug Designation applications

CHECKMATE PHARMACEUTICALS INC; CAMBRIDGE, MA 2019 – 2020

Vice President, HEAD OF GLOBAL REGULATORY AFFAIRS (MEMBER: LEADERSHIP TEAM)

- ◆ Led Global Regulatory Strategy efforts for portfolio of chemotherapy providing guidance.
- ◆ Primary author of numerous documents (e.g., Fast Track, Orphan Drug Designation, meeting requests, IB).
- ◆ Provided significant Drug Development guidance for immune-oncology products.
- ◆ Involved in the business development

TARVEDA THERAPEUTICS INC; WATERTOWN, MA 2018 - 2019

Vice President, HEAD OF GLOBAL REGULATORY AFFAIRS AND QUALITY ASSURANCE

- ◆ Led Global Regulatory Strategy efforts for portfolio of two Phase 2 chemotherapy products.
- ◆ Primary author of numerous documents (e.g., Fast Track, Orphan Drug Designation, meeting requests).
- ◆ Provide significant Drug Development guidance for products in clinical trials and pre-clinical opportunities.
- ◆ Oversight of GXP, manufacturing/clinical vendor audits, investigations/deviations/CAPAs generation and resolution of manufacturing, analytical development for drug release and stability testing.

BERG LLC; FRAMINGHAM, MA (Focused Now on Artificial Intelligence) 2018

Vice President, HEAD OF GLOBAL REGULATORY AFFAIRS AND QUALITY ASSURANCE

- ◆ Provided Global Regulatory and Quality Strategic guidance and input; oncology and rare disease focused.
- ◆ Authored key documents including briefing documents, protocols, Breakthrough and orphan drug designations.

CONSULTANT 2017 – 2018

- ◆ Authored various documents for submission to FDA, EMA and other Health Authorities.
- ◆ Provided guidance to numerous organizations on clinical trial design, global regulatory strategic guidance
- ◆ Input on development of products for patients with cancer and rare diseases with emphasis on patient focus.

CASTLE CREEK PHARMACEUTICALS LLC; PARSIPPANY, NJ 2016 – 2017**Senior Vice President and HEAD OF GLOBAL REGULATORY AFFAIRS (MEMBER: LEADERSHIP TEAM)**

- ◆ Lead Global Regulatory efforts for all portfolio products and primary author of many key documents.
- ◆ Diacerein 1% ointment (EBS; rare disease): Wrote Phase 3 registration study protocol working closely with Patient Advocates and rare disease physicians; guided multi-functional plans; negotiated with FDA and EMA.
- ◆ Business development: Actively engaged in all in-license activities providing scientific and business guidance.

BAXALTA INC; CAMBRIDGE, MA 2015 – 2016***Vice President, REGULATORY AFFAIRS, ONCOLOGY AND BIOSIMILARS THERAPEUTIC AREAS (MEMBER: ONCOLOGY LEADERSHIP TEAM)***

- ◆ Led the Global Regulatory Strategy Group providing strategic guidance and supervision of personnel responsible for the optimal clinical, CMC and nonclinical development for all oncology portfolio compounds.
- ◆ Core member of the Oncology Leadership Team and involved in external Policy; close collaboration with Commercial, Medical Affairs, Corporate/Oncology Communications, and Market Access colleagues.
- ◆ Member, multiple Joint Steering/Oversight Committees with partners.
- ◆ Member, Oncology New Product Search and Evaluation Team for new opportunities performing many high-level discussions with [potential partners and due diligence reviews.
- ◆ Significant involvement in the submission of multiple marketing applications in the US, EU, elsewhere.
- ◆ Guided content presentation for multiple global health authority meetings.
- ◆ Ensured optimal Health Authority meetings including negotiation of labeling and post-approval commitments.
- ◆ Key member of teams that in-licensed Oncaspar and calaspargase pegol along with multiple cancer immune-oncology product partnerships with Symphogen and Precision BioSciences.

IMMUNOMEDICS INC; MORRIS PLAINS, NJ 2013 – 2015***Vice President and HEAD OF REGULATORY AFFAIRS, PROJECT MANAGEMENT AND CLINICAL RESEARCH/OPERATIONS***

- ◆ Led Global Regulatory Affairs efforts for the optimal development for all portfolio compounds.
- ◆ Member, Senior Management Group with oversight of Clinical Research/Operations.
- ◆ Significant partner in the design, evaluation and reporting of clinical, nonclinical and quality (manufacturing) studies for all antibody-directed products in pre-IND/CTA phase and in clinical trials.
- ◆ Significant involvement in business development (out-licensing for oncology and non-oncology products)

MILLENNIUM PHARMACEUTICALS INC; CAMBRIDGE, MA 2011 – 2013***(NOW TAKEDA)******Senior Director, Regulatory Affairs, Head Global Regulatory Strategy Group***

- ◆ Led the Global Regulatory Strategy Group providing strategic guidance and supervision of personnel responsible for the optimal development for all oncology portfolio compounds.
- ◆ Active member representing Millennium at the BIO Regulatory Affairs Coordinating, Clinical and PDUFA V Committees and represented BIO in discussions with Massachusetts Senators and Congressmen.
- ◆ Developed and led Regulatory Intelligence organization; ensured delivery of analysis of regulatory policy, Clinical and CMC information to partners in government affairs, commercial and development colleagues.
- ◆ Contributing member, numerous cross-functional oversight committees with regulatory, clinical and pharmaceutical focus. Key contributor to Oncology Protocol Review Committee.
- ◆ Participation in the preparation and Health Authority meetings and negotiation of labeling and commitments.
- ◆ Involved in successful in-license of multiple oncology products.

SAVIENT PHARMACEUTICALS INC; EAST BRUNSWICK, NJ 2009 – 2011*(Company assets acquired)****Group Vice President of Quality and Regulatory Affairs and Interim Head of Clinical and Medical Affairs***

- ◆ KRYSTEXXA (pegloticase) BLA approval and EU MAA validation: Led submission strategic and operational activities, authored key clinical, REMS, and CMC documents and Full Prescribing Information/Summary of Product characteristics and Medication Guide/Patients Leaflets. Negotiated with FDA post-marketing commitments and approval finalization.
- ◆ Key driver defining, refining, and ensuring implementation of US/EU/Global regulatory strategy and significant involvement in corporate activities, including due diligence/out-licensing, as a member of senior management team including key cross-functional committees.
- ◆ Leadership of activities related to FDA Advisory Committee meeting; also, was a presenter.
- ◆ Ensured timely submission and compliance with all applicable regulatory requirements throughout the BLA review process to facilitate successful and approval of regulatory applications.
- ◆ Assured compliance with all SOPs, developed new procedures needed for business purposes and quality standards for health authority inspections of clinical, nonclinical and CMC activities.
- ◆ Reviewed or generated all proposed/final corporate and health authority communications.
- ◆ Effective budget and personnel management including coaching, training, development, and mentoring.
- ◆ Executed retrospective analyses of clinical data that led to clinical guidance in labeling for KRYSTEXXA.
- ◆ Invited to present at American College of Rheumatology 2010 Plenary Session; data.

EXOEMIS, INC; LITTLE ROCK, AK (HEADQUARTERS; Company Disbanded) 2008***Vice President and Head, Clinical and Regulatory Affairs (Virtual)***

- ◆ Strategic and operational leader for Phase 1 and 2 studies designing and writing multiple clinical protocols.
- ◆ Wrote and finalized documents and annual reports to FDA, including Investigator's Brochure, clinical study reports and responses to FDA and other governmental organizations inquires.
- ◆ Designed, interpreted, and presented *in vitro* or *in vivo* nonclinical efficacy studies.
- ◆ Significant involvement and authorship in the generation of multiple abstracts and presentation of posters at scientific meetings of *in vitro* or *in vivo* nonclinical efficacy data.

JOHNSON & JOHNSON, PHARMACEUTICAL RESEARCH & DEVELOPMENT; RARITAN, NJ 2000 – 2007***Vice President and Compound Development Team Leader (PROCRIT, EPREX, and Senicapoc) 2004 – 2007***

- ◆ Strategic leader, primary driver or major contributor that provided:
 - Clear and timely responses to global health authorities that ensured timely execution of development programs, enhanced labeling, and Phase IV commitments review and approval.
 - Effective presentations for many FDA, EMEA/CHMP and multiple FDA Advisory Committee meetings.
 - Ensured reduction in timelines and costs for clinical registration programs.
- ◆ Major strategic contributor, document contributor and designer of post-commitment activities that led to reversal of safety concern in EPREX label resulting in about \$100 million in additional annual sales.
- ◆ Championed new device technology to increase patient safety and product differentiation.
- ◆ Significant involvement in the post-approval clinical studies design and ensured timely implementation.
- ◆ Effectively managed a multi-million-dollar budget within a small variance and ensured appropriate resources were trained, optimally utilized, and engaged.

JOHNSON & JOHNSON, PHARMACEUTICAL RESEARCH & DEVELOPMENT; RARITAN, NJ (CONTINUED)***Senior Director, DOXIL Compound Development Team Leader******Senior Director and Acting ZARNESTRA Compound Development Team Leader***

- ◆ Formed and led cross-functional DOXIL Development Team.
- ◆ Strategic and operational leader for DOXIL Ovarian Cancer NDA approval.
- ◆ Driver/major contributor for the Multiple Myeloma and Breast Cancer clinical program/registration designs.
- ◆ Co-chair of Global Joint Development Team with Schering Plough.

Senior Director and Head, Global Oncology and Gastroenterology Regulatory Affairs and Global Senior Regulatory Strategic Leader

- ◆ Significant contributor for timely development/global regulatory actions for oncology and gastroenterology.
- ◆ Member of Aciphex Global Joint Development Team with Eisai.
- ◆ Regulatory member for over 30 external due diligence efforts; two successful in-licenses.
- ◆ Key regulatory contributor/member to oncology portfolio assessment, future of medicine exercise, company financial and time management systems, process improvement and re-organization teams.

ELI LILLY AND COMPANY; INDIANAPOLIS, IN 1995 – 2000***Senior Regulatory Research Scientist, Oncology and US Regulatory Affairs******Regulatory Research Scientist, Oncology and US Regulatory Affairs***

- ◆ Member of numerous Oncology Development Teams as the regulatory leader.
- ◆ Core member (regulatory representative) for over 20 in- and out-licensing opportunities regarding oncology and other therapeutic areas; one successful in-license.
- ◆ Involved in external policy with FDA.
- ◆ Contributor to ensure timely development and global regulatory actions for oncology products.
- ◆ Key contributor to process improvement initiatives and multi-function re-organization efforts/ teams.

ZENECA PHARMACEUTICALS (Formerly ICI Pharma; Now AstraZeneca); WILMINGTON, DE 1991 – 1995***Assistant Manager, Cardiovascular and Anti-Infective, Drug Regulatory Affairs******Senior Specialist, Cardiovascular and Pulmonary, Drug Regulatory Affairs******Specialist, Cardiovascular and Pulmonary, Drug Regulatory Affairs***

- ◆ Involved in positive Zestril Congestive Heart failure FDA Advisory Committee.
- ◆ Resolved issues which arose during FDA review of INDs and NDA as liaison directly with FDA personnel.
- ◆ Member, numerous PhRMA committees negotiating with FDA on proposed new guidelines.
- ◆ Design team member, ACCOLATE NDA and CANDIA; lead regulatory negotiator with FDA.

SMITHKLINE BEECHAM PHARMACEUTICALS; UPPER MERION, PA 1990 – 1991***(Now Glaxo SmithKline Pharmaceuticals)******Assistant Senior Investigator, Department of Cardiovascular Pharmacology***

- ◆ Developed/characterized acute and chronic swine myocardial infarction models.
- ◆ Demonstrated cardioprotective effects of carvedilol (Coreg) and thrombolytic compounds (e.g. Eminase) in canine models of myocardial ischemia (acute and chronic) or thrombosis, respectively.

OKLAHOMA UNIVERSITY HEALTH SCIENCE CENTER, AND 1988 – 1990
OKLAHOMA MEDICAL RESEARCH FOUNDATION; OKLAHOMA CITY, OK
OMRF Instructor in Pathology

- ◆ Investigated neutrophil-platelet adhesion (CD62, GMP-140)
- ◆ Combined electron paramagnetic resonance spectrometry with nitron spin trapping to detect free radicals.
- ◆ Modulated free radical generation from isolated human neutrophils

INDIANA UNIVERSITY; INDIANAPOLIS, IN 1984 – 1988
Graduate Research Assistant, Department of Pharmacology

- ◆ Determined mechanisms involved in hemorrhage-induced bradycardia in the rat.
- ◆ Involved in the development of the tyramine radioenzymatic assay.
- ◆ Leader for animal cardiovascular laboratory for medical student training in pharmacology.

METHODIST HOSPITAL OF INDIANA, INDIANAPOLIS, IN 1980 – 1985

Physiology Research Associate, Department of Medical Research 1982 – 1985
Research Assistant, Department of Medical Research 1980 – 1982

- ◆ Focused on the mechanism involved in canine and rat endotoxic and hemorrhagic shock models.
- ◆ Involved in developing and validating impedance cardiography for measurement of cardiac output and ejection fraction on a beat-by-beat basis in anesthetized dogs.
- ◆ Involved in the isolation of insulin degrading enzyme.

INDIANA UNIVERSITY SCHOOL OF MEDICINE, INDIANAPOLIS, IN 1979 – 1980
Laboratory Technician, Department of Clinical Research

- ◆ Measured plasma cyclic AMP and hydroxyproline for clinical studies.

UNIVERSITY OF IOWA SCHOOL OF MEDICINE, IOWA CITY, IA 1973 – 1979
Research Assistant, Toxicology Center (full-time) 1978 – 1979
Research Assistant, Cardiovascular Research Center (full-time) 1977 – 1978
Research Assistant, Gastroenterology Research laboratory (half-time when a student) 1973 – 1977

SIGNIFICANT INVOLVEMENT IN PRODUCTS THAT WERE APPROVED OR IN PHASE III

CASTLE CREEK PHARMA	Diacerein 1% ointment ¹ , Arlevert ²
BAXALTA	Oncaspar, Onivyde ³ , pacritinib ⁴ , calaspergase pegol
IMMUNOMEDICS	⁹⁰ Y-Clivatuzumab tetraxetan
MILLENNIUM/TAKEDA	Velcade
SAVIENT	KRYSTEXXA (pegloticase)
JOHNSON & JOHNSON	ZARNESTRA; DOXIL/CAELYX ⁵ ; YONDELIS ⁶ ; PROCRT ⁷ ; EPREX; Velcade ⁸ ; Senicapoc ⁹ ; Aciphex ¹⁰
ELI LILLY	Alimta; Ontak ¹¹ ; Evista; Gemzar, Arzoxefine (SERM-3), Eloxatin ¹²
ICI/ZENECA	Tenormin; Tenoretic; Zestril ¹³ ; Zestoretic ¹³ ; Merrem; Accolate
SMITHKLINE	Eminase (nonclinical); Coreg (nonclinical)

Collaborations/partnerships with: 1. TWiB 2. Hennig 3. Merrimack 4. CTI 5. Schering-Plough (Also Joint Development Team Leader); 6. PharmaMar (Regulatory Due Diligence Leader); 7. Amgen; 8. Millennium (Regulatory Due Diligence Leader); 9. Icagen (Also Joint Development Committee Co-Leader) 10. Eisai (Also Joint Development Committee Member and Global Regulatory Leader); 11. Seragen (currently marketed by Eisai); 12. Sanofi (Subsequently returned by Eli Lilly); 13. Merck.

EDUCATION

PhD , Pharmacology and Toxicology, Indiana University School of Medicine, Indianapolis, IN <i>Minor in Physiology</i> Thesis: Analysis of Mechanisms Involved in Hemorrhage-Induced Bradycardia in the Rat	1988
MS , Biology, Butler University, Indianapolis, IN Thesis: Benoxaprofen Reversal of Lethal Canine Endotoxic Shock: Mechanisms of Improvement and Comparison with Ibuprofen Treatment	1984
BS , General Science/Biochemistry, University of Iowa, Iowa City, IA	1977

MAJOR HONORS

Johnson and Johnson: Standard of Leadership (2007)

Leadership for FDA Cardio-renal Advisory Committee meeting strategy, documents, and presentation

Result: Appropriate communication of benefit:risk of product class in patients with kidney disease.

Johnson and Johnson: Standard of Leadership (2007)

Return to subcutaneous use of EPREX in Europe

Result: Expansion of label in many countries that led to about \$100 million of additional annual sales.

Johnson and Johnson: Standard of Leadership (2005)

New PROCrit pediatric labeling

Result: Expanded label with key efficacy and safety information.

Johnson and Johnson: Standard of Leadership (2005)

Full FDA Approval for the Treatment of Patients with Ovarian Cancer

Result: Expanded label and removal of conditional accelerated approval status.

Johnson and Johnson: Standard of Leadership (2005)

Led regulatory team for the In-license of Yondelis

Result: Important oncology product added to J&J portfolio.

OTHER HONORS

Johnson and Johnson: Vision Award (2004)

Supporting the ZARNESTRA Team as acting Team Leader resulting in seamless work efforts.

Johnson and Johnson: Vision Award (2004)

Submission of a quality DOXIL Ovarian Cancer sNDA meeting company high standards and timelines

Resulting in on-time submission of data and reports located in multiple systems.

Johnson and Johnson: Vision Award (2003)

Led regulatory in-license Velcade team which is an important oncology product to J&J portfolio.

American Society for Pharmacology and Experimental Therapeutics Graduate Student Travel Award (1988)

Selection from over 100 abstracts.

Sigma Xi Graduate Student Research Competition Honorable Mention (1987)

Selection based upon presentation of laboratory research.

TEACHING ASSIGNMENTS

Adjunct Faculty , Clinical Drug Development and Regulatory Overview, Butler University	1996
Lecturer , Dental Pharmacology, Indiana University	1986
Lecturer , Respiratory Therapy Pharmacology, Indiana University	1986 –1987
Laboratory Instructor , Medical Pharmacology, Indiana University	1984 –1987

PROFESSIONAL ORGANIZATIONS

MEMBERSHIPS

American Society of Clinical Oncology (ASCO)
 Drug Information Association (DIA)
 Regulatory Affairs Professional Society (RAPS)
 American Society of Pharmacology and Experimental Therapeutics (former)
 Inflammation Research Organization (former)

COMMITTEES (SELECTED; FORMER ACTIVE MEMBERSHIPS)

- BIO, Regulatory Affairs, PDUFA V and Clinical Committees, Member
- PhRMA-FDA Working Group for Oncology Regulatory Issues, Member
- PhRMA-FDA Working Group for External Discussions on Regulatory and Oncology Drug Development Issues, Chairperson
- Curriculum Committee, PERI, Member
- Steering Committee of the Americas, DIA, Member
- PhRMA FDA International Working Group, Member

SELECTED INVITED PROFESSIONAL PRESENTATIONS

Chairperson: CBI's 5th Annual Summit on FDA Advisory Committee Preparation.

Presenter: Handling Committee Questions When You Don't Have the Data to Back Up Your Answers.
 Washington, DC, February 2014

Plenary Session Presenter: Safety and Efficacy of Long-term Pegloticase (KRYSTEXXA™) Treatment in Patients with Chronic Gout Refractory to Conventional Therapy - Persistent Responder Analysis.
 American College of Rheumatology Meeting, Atlanta, GA.

Presenter: Optimize Communication with the FDA Before, During and After an Advisory Committee Meeting is Called

Panelist: Anticipate Advisory Committee Questions in Light of Evolving COI Regulations—Prepare for Unknown and Untraditional Participants
 Washington, DC, April 2010

FDA Advisory Committee Presenter: Pegloticase as a Therapy for Patients with Refractory Gout, Arthritis Drug Advisory Committee, June 16, 2009

Course Director and Presenter: PERI Drug Development Course on Cancer Pathophysiology and Drug Development (invited speakers from FDA, NCI and Georgetown Oncology and Hematology physicians)
 Washington DC; every 6 months: 1997-2005

Presenter: Regulatory Acceptance of Clinical Endpoints

Presenter: How predictive are preclinical models of anti-cancer agents? In Innovations in Cancer Discovery and Clinical Trials in Cancer
 London, July, 2004

SELECTED INVITED PROFESSIONAL PRESENTATIONS (CONTINUED)

FDA Advisory Committee Presenter: DOXIL: Treatment of Kaposi's sarcoma in AIDS patients, Oncologic Drugs Advisory Committee, March 12, 2003

FDA Advisory Committee Presenter: DOXIL: Treatment of metastatic ovarian cancer in patients with disease refractory to both paclitaxel and platinum-based chemotherapy, Oncologic Drugs Advisory Committee, March 12, 2003

Presenter: Fast Track, Priority Review and Accelerated Approval in Oncology Product Development Conference
Lisbon, July 2003

Session Organizer, Chairman, and Presenter: Label is the driver for drug development
DIA Annual Conferences

Presenter: Addressing the Regulatory Challenges of Global Oncology Drug Development. Institute for International Research (US). Clinical Trials for Molecularly Targeted Cancer Drugs

Presenter: Reviewing Accelerated Approval for Oncology Products in the United States. Institute for International Research (UK). Clinical Trials for Oncology Products: Towards Improved Design and Conduct

Presenter: Over forty-five other invited presentations on drug development, regulatory affairs between 1996 and 2020

PUBLICATIONS

1. Miller, D.L., Hamburger, S.A., Schedl, H.P.: Effects of osmotic gradients on water and electrolyte transport: In vivo studies in the rat duodenum and ileum. *American Journal of Physiology* 237(4):E389-396, 1979.
2. Fischer, L.J., Hamburger, S.A.: Inhibition of alloxan action in isolated pancreatic islets by superoxide dismutase, catalase and a metal chelator. *Diabetes* 29(3):213-215, 1980.
3. Fischer, L.J., Hamburger, S.A.: Dimethylurea: A radical scavenger that protects isolated pancreatic islets from the effects of alloxan and dihydroxyfumarate exposure. *Life Sciences* 26(17):1405-1409, 1980.
4. Fischer, L.J., Hamburger, S.A.: Impaired insulin release after exposure of pancreatic islets to autooxidizing dihydroxyfumarate. *Endocrinology* 108(6): 2331-2335, 1981.
5. Toth, P.D., Hamburger, S.A., Judy, W.V.: The effects of vasoactive antagonists on endotoxic shock in dogs I. *Circulatory Shock* 12(6):277-286, 1984.
6. Toth, P.D., Hamburger, S.A., Hastings, G.H., Judy, W.V.: Benoxaprofen attenuation of lethal canine endotoxic shock. *Circulatory Shock* 15:89-103, 1985.
7. Toth, P.D., Hamburger, S.A., Judy, W.V.: The hemodynamic effects of naloxone on hemorrhagic shock in the beagle. *Circulatory Shock* 29(1):35-42, 1986.
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Subcategory
Miscellaneous Notices

BLUE LAKE COMMUNITY
DEVELOPMENT DISTRICT
NOTICE OF SPECIAL BOARD
MEETING AND ATTORNEY-CLIENT SESSION

Notice is hereby given that the Blue Lake Community Development District (District) Board of Supervisors (Board) will conduct the following attorney-client sessions at its special board meeting:

Attorney-Client Session

November 18, 2025, at 10:00 a.m.

18721 WildBlue Boulevard

Fort Myers, Florida 33913

The attorney-client session, which is closed to the public, is being held pursuant to Section 286.011(8), Florida Statutes, to discuss settlement negotiations and strategy related to litigation expenditures concerning the ongoing litigation entitled Blue Lake Community Development District v. Lennar Homes, LLC; CalAtlantic Group LLC; Barraco and Associates, Inc; Turrell, Hall & Associates, Inc., Marine Contracting Group Inc.; and Earth Tech Enterprises Inc., Case No: 2025-CA-004085. The following persons are anticipated to be in attendance at the attorney-client session: Christopher Hasty, David Bello, Norbert Larsen, Mark Rapponotti, Terry Vette, David Gurley, Christopher Fiore, Kathleen Meneely, Wesley Haber, and a court reporter. The attorney-client session is expected to last approximately 120 minutes.

The special board meeting begins at 10:00 a.m. on the same date and at the same location and will occur prior to the attorney-client session for the purpose of considering any business of the District and will continue to be held after the attorney-client session for the purpose of taking up any business that may be the result of the attorney-client session or any other business of the District. Both portions of the special board meeting are open to the public and will be conducted in accordance with the provisions of Florida law for community development districts. A copy of the agenda for the meeting may be obtained from the District Manager, Special District Services, Inc., 2501A Burns Road, Palm Beach Gardens, Florida 33410.

The board meeting may be continued to a date, time, and place approved by the Board on the record without additional publication of notice. There may be occasions when one or more Supervisors will participate by telephone.

Pursuant to provisions of the Americans with Disabilities Act, any person requiring special accommodations to participate in this meeting/hearing/workshop is asked to advise the District Office at least forty-eight (48) hours before the meeting/hearing by contacting the District Manager at (561) 630-4922. If you are hearing or speech impaired, please contact the Florida Relay Service by dialing 7-1-1, or 1-800-955-8771 (TTY) / 1-800-955-8770 (Voice), who can aid you in contacting the District Office.

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

Kathleen Meneely, District Manager

BLUE LAKE COMMUNITY
DEVELOPMENT DISTRICT

No.11815309 Nov. 10, 2025