

## **RESOLUTION 2017-03**

### **A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE AVE MARIA STEWARDSHIP COMMUNITY DISTRICT ADOPTING SPECIAL ELECTION POLICIES AND PROCEDURES; AND PROVIDING FOR SEVERABILITY AND EFFECTIVE DATE.**

**WHEREAS**, the Ave Maria Stewardship Community District (“District”) is a local unit of special purpose government created and existing pursuant to Chapter 2004-461, Laws of Florida, ( the “Act”) being situated in Collier County, Florida; and

**WHEREAS**, in accordance with the provisions of the Act, on June 27, 2016, the qualified electors, as defined in same, approved a referendum on the question of should certain members of the Board of Supervisors of the Ave Maria Stewardship Community District be elected by qualified electors, as defined in the Act as any person at least 18 years of age who is a citizen of the United States, a legal resident of Florida and of the District and who registers to vote with the Supervisor of Elections in Collier County; and

**WHEREAS**, the Act required the Board of Supervisors of the District (“Board”) to direct District staff to prepare maps of the District describing the extent and location of all urban areas within the District (the “Urban Area Maps”); and

**WHEREAS**, the Act defines “urban area” as “a developed and inhabited urban area within the District within a minimum acreage resident population density of at least 1.5 persons per acre as defined by the latest official census, special census, or population estimate, a minimum density of one single-family home per 2.5 acres with access to improved roads, or a minimum density of one single-family home per 5 acres within a recorded plat subdivision”; and

**WHEREAS**, on August 2, 2016, the District Engineer presented the Urban Area Maps to the Board at a duly noticed public meeting and after discussion the Board requested certain revisions be made to the Urban Area Maps; and

**WHEREAS**, on September 9, 2016, the District Engineer presented the revised Urban Area Maps to the Board at a duly noticed public meeting and after discussion the Board requested certain additional revisions be made to the Urban Area Maps; and

**WHEREAS**, on October 4, 2016, the District Engineer presented the further revised Urban Area Maps to the Board at a duly noticed public meeting; and

**WHEREAS**, pursuant to the Act, upon presentation of the Urban Area Maps, any District landowner or elector had the ability to contest the accuracy of the Urban Area Maps within 30 days of submission to the Board; and

**WHEREAS**, the District did not receive any notice of objections to the Urban Area Maps; and

**WHEREAS**, on December 6, 2016, the Board adopted the Urban Area Maps as the

official maps of the District; and

**WHEREAS**, pursuant to the Act, any District landowner or qualified elector may contest the accuracy of the official maps in accordance with the provision for judicial review as provided in the Florida Administrative Procedure Act; and

**WHEREAS**, no contest was filed prior to the January 5, 2016, deadline for filing any contest pursuant to the Florida Administrative Procedure Act; and

**WHEREAS**, in accordance with the Act and section 189.04, Florida Statutes, the Board set the qualifying period for Seat 3 of the Board from noon March 24, 2017 through noon March 31, 2017, and the special election for April 25 , 2017 from noon to 7 p.m.; and

**WHEREAS**, the District has provided a report to the Collier County Supervisor of Elections stating the purpose, date, authorization and procedures of the special election as required pursuant to the Act and section 189.04, Florida Statutes, attached hereto as **Exhibit A**; and

**WHEREAS**, the Board accordingly finds that it is in the best interest of the District to establish by resolution the policies and procedures attached hereto as **Exhibit B** (the “Special Election Policies and Procedures”) to govern the District’s actions related to the special election and qualifying period.

**NOW, THEREFORE, BE IT RESOLVED BY THE BOARD  
OF SUPERVISORS OF THE AVE MARIA STEWARDSHIP  
COMMUNITY DISTRICT:**

**SECTION 1.** The Special Election Policies and Procedures attached hereto as **Exhibit B** are hereby adopted pursuant to this resolution as necessary for the conduct of the special election and qualifying period. The Special Election Policies and Procedures shall remain in full force and effect through swearing-in of a qualified elector elected by qualified electors to Seat 3 of the Board.

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

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

**PASSED AND ADOPTED** this 7<sup>th</sup> day of March, 2017.

**ATTEST:**

**AVE MARIA STEWARDSHIP COMMUNITY  
DISTRICT**

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**ASSISTANT SECRETARY**

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**CHAIRMAN**

**Exhibit A:** Report to Collier County Supervisor of Elections

**Exhibit B:** Special Election Policies and Procedures

## Exhibit A



February 15, 2017

Supervisor Jennifer J. Edwards  
Collier County Supervisor of Elections  
3750 Enterprise Avenue  
Naples, FL 34104

RE: Ave Maria Stewardship Community District (the "AMSCD")  
Special Election for Seat 3 of the Board of Supervisors of the AMSCD (the  
"Board")

Dear Supervisor Edwards:

As you are aware, pursuant to Chapter 2004-461, Laws of Florida, (the "Act") the AMSCD is in the process of transitioning one Board seat to election by qualified electors. As previously discussed, the Collier County Supervisor of Elections has statutory authority to conduct the special election for the transitioned Board seat. However, based on those discussions, it is our understanding that your office agrees that the AMSCD also has authority pursuant to the Act and section 189.04, Florida Statutes, to conduct the election. As such, the AMSCD has set a qualifying period and will hold a special election for Seat 3 of the Board on April 25, 2017. As required by the Act and section 189.04, Florida Statutes, please let this letter serve as the AMSCD's report of the purpose, date, authorization and procedures of the AMSCD's special election for Seat 3 of the Board.

- I. Purpose: In accordance with the Act, on June 27, 2016, the qualified electors, as defined in same, approved a referendum on the question of should certain members of the Board be elected by qualified electors, as defined in the Act as any person at least 18 years of age who is a citizen of the United States, a legal resident of Florida and the AMSCD and who registers to vote with the Supervisor of Elections in Collier County. Thereafter, the AMSCD took action required by the Act to determine that one Board seat must be elected by qualified electors on or before July 5, 2017, and called a special election for Seat 3 of the Board.
- II. Date: Candidates must qualify with the AMSCD from March 24-31, 2017. The AMSCD will hold the special election on April 25, 2017.
- III. Authorization: The Act and section 189.04, Florida Statutes, authorize the AMSCD to conduct the special election.
- IV. Procedures: The AMSCD shall hold the special election in accordance with the requirements of the Act and section 189.04, Florida Statutes.

The AMSCD will timely report to your office the results of the special election. Please contact me immediately if this letter does not accurately reflect our previous discussions or if you have any concerns regarding the special election.

Sincerely,



Todd Wodraska  
District Manager

Cc: Jonathan T. Johnson, District Counsel

## **Exhibit B**

### **Special Election Policies and Procedures**

1. **District Publishes Notice of Qualifying Period.** Two publications, first publication no later than March 14, 2017.
  - a. Section 100.141, Florida Statutes, requires two publications, first publication at least 10 days prior to qualifying period for special election to fill any vacancy in office.
  - b. Form of Notice of Qualifying Period is attached as **Exhibit A**.
2. **District Publishes Notice of Election-** First publication no later than March 24, 2017, second publication no later than April 7, 2017.
  - a. Section 100.342, Florida Statutes, requires at least 30 days' notice of the election by publication. The notice shall be made at least twice, once in the fifth week and once in the third week prior to the week in which the election is to be held.
  - b. Form of Notice of Election is attached as **Exhibit B**.
3. **Qualifying Period. Commencing at noon on March 24, closing at noon March 31, 2017.**
  - a. By end of qualifying period, Candidates to provide:<sup>1</sup>
    - i. Loyalty Oath for Non-Partisan Office attached hereto as **Exhibit C**;
    - ii. Form 1 Disclosure of Financial Interests attached hereto as **Exhibit D**<sup>2</sup>;
    - iii. District Affidavit of Intent attached hereto as **Exhibit E**;
    - iv. \$25,000 cash or check OR petitions, in the form attached hereto as **Exhibit F**, containing 25 signatures of qualified electors within the District.
  - b. At conclusion of qualifying period, District Manager, or its designee, to check the signatures on the petitions to verify their status as qualified electors within the District and certify the number of valid signatures. District Manager, or its designee, shall notify the candidate as to whether the required number of signatures was obtained.
  - c. The District Manager, or its designee, shall receive and review candidates' items during the qualifying period. Review of qualifying papers is a ministerial function. In determining whether a candidate is qualified, the District Manager, or its designee, shall review the qualifying papers to determine whether all items required have been properly filed and whether each item is complete on its face. The District Manager may not determine whether the contents of the qualifying papers are accurate.
4. **Publication and Provision of Ballot Form.**
  - a. Provide two sample ballots to the polling place. The sample ballots shall be in the form of the official ballot as it will appear at the polling place on election day. Sample ballots shall be open to inspection by all qualified electors.
  - b. Publish a sample ballot in a newspaper of general circulation in the county, before the day of election.

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<sup>1</sup> If the District Manager, or its designee, receives qualifying papers during the qualifying period which do not include all items as required prior to the last day of qualifying, the District Manager shall make a reasonable effort to notify the candidate of the missing or incomplete items and shall inform the candidate that all required items must be received by the close of qualifying. A candidate's name as it is to appear on the ballot may not be changed after the end of qualifying.

<sup>2</sup> A public officer who has filed the full and public disclosure or statement of financial interests with the Commission on Ethics or the supervisor of elections prior to qualifying for office may file a copy of that disclosure at the time of qualifying.

5. **Resignation of Office.** Supervisor Carletta provides notice of resignation, effective upon qualified elector election of a qualified elector to Seat 3 by a majority of those voting.
  - a. Supervisor Carletta was elected at the November 2016 landowner's election to Board Seat 3 which expires in November 2018. Pursuant to Resolution No. 2016-05, Seat 3 of the Board was designated as the seat to be converted to election by qualified electors. Therefore, Supervisor Carletta should provide a notice of resignation of Board Seat 3 effective upon qualified elector election of a qualified elector by a majority of those voting.
6. **Special Election. April 25, 2017, 12 p.m. to 7 p.m.**
  - a. Pursuant to Chapter 2004-306, Laws of Florida, only a qualified elector defined as any person at least 18 years of age who is a citizen of the United States, a legal resident of Florida and of the District and who registers to vote with the Supervisor of Elections in Collier County may vote.
  - b. Qualified electors shall be required to provide current and valid picture identification<sup>3</sup> prior to voting along with their voter's registration card or other evidence of voter's registration.
  - c. Winner of the election must be by a majority of those voting.
    - i. With the exception of elections of special district governing body members conducted on a one-acre/one-vote basis, in any election conducted in a special district the decision made by a majority of those voting shall prevail, except as otherwise specified by law.<sup>4</sup>
  - d. The District Manager shall keep a list of those voting.
7. **Assumption of Office.**
  - a. Neither the Act nor section 189.04, Florida Statutes, establishes when a newly-elected supervisor shall take office. As stated above, the supervisor shall be deemed elected upon receipt of a majority of votes cast by those voting. The newly-elected supervisor shall take office upon the Board's certification of the election results at the next meeting of the Board and administration of the oath of office.
8. **Other Issues.**
  - a. Vote-By-Mail.
    - i. The District may elect to allow vote-by-mail ballots but is not obligated to do so. If the Board elects to allow vote-by-mail ballots, the following policies and procedures regarding provision and collection of vote-by-mail ballots shall apply.
      1. The District Manager, or its designee, shall accept a request for a vote-by-mail ballot from a qualified elector in person or in writing. The District Manager, or its designee, may accept a written or telephonic request for a vote-by-mail ballot. Family members may also make the request in in person. A request for a vote-by-mail ballot to be mailed to a voter must be received no later than 5 p.m. on the sixth day before the election by the District Manager. The

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<sup>3</sup> Valid forms of picture identification are a Florida driver license, Florida identification card issued by the Department of Highway Safety and Motor Vehicles, United States passport, debit or credit card, military identification, student identification, retirement center identification, neighborhood association identification, public assistance identification, veteran health identification card issued by the United States Department of Veterans Affairs, a license to carry a concealed weapon or firearm issued pursuant to section 790.06, Florida Statutes, or employee identification card issued by any branch, department, agency, or entity of the Federal Government, the state, a county, or a municipality.

<sup>4</sup> Section 189.04(4), Florida Statutes.

District Manager shall mail vote-by-mail ballots to voters requesting ballots by such deadline no later than four days before the election.

The District Manager shall mail vote-by-mail ballots within two business days after receiving a request for such a ballot.

2. The District Manager shall include instructions, voter's certificate and a vote-by-mail affidavit similar in form to those required by sections 101.64, 101.65, and 101.68, Florida Statutes.
3. Absentee ballots to be counted must be received by the District Manager by 7 p.m. the day of the special election.

b. Early Voting.

- i. The District may provide early voting in any District election not held in conjunction with county or state elections.<sup>5</sup> If the District provides early voting, it may designate as many sites as necessary. Such early voting sites must be geographically located so as to provide all voters in that area with an equal opportunity to cast a ballot, insofar as it is practicable. If the Board elects to allow early voting the following policies and procedures shall apply.
  1. If the early voting is to be offered, the District shall designate the site and hours that early voting will occur at least 30 days prior to the election.<sup>6</sup>
  2. Any person in line at the closing of an early voting site shall be allowed to vote.<sup>7</sup>
  3. The qualified elector must provide identification and complete an early voting certificate in the form required by section 101.657, Florida Statutes, prior to early voting.

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<sup>5</sup> Section 101.657(1)(f), Florida Statutes.

<sup>6</sup> Section 101.657(1)(b), Florida Statutes.

<sup>7</sup> Section 101.657(1)(c), Florida Statutes.



Exhibit A

**NOTICE OF QUALIFYING PERIOD  
FOR CANDIDATES FOR THE  
BOARD OF SUPERVISORS OF THE  
AVE MARIA STEWARDSHIP COMMUNITY DISTRICT**

In accordance with Chapter 2004-461, Laws of Florida, (the “Act”) and Section 189.04, Florida Statutes, notice is hereby given that the qualifying period for candidates for the Seat No. 3 qualified elector office of Supervisor of the **Ave Maria Stewardship Community District** will commence at **noon on March 24, 2017, and close at noon on March 31, 2017**. Candidates must qualify for this office of Supervisor with the offices of the **District, located at Ave Maria Master Association located at 5076 Annunciation Circle, Suite 103, Ave Maria, Florida 34142, telephone number 239-867-4322**. All candidates shall qualify in accordance with the Act by (1) paying a filing fee of \$25 or qualifying by petition process pursuant to section 99.095, Florida Statutes, (2) filing a Form 1 Disclosure of Financial Interests, (3) a Loyalty Oath for Non-Partisan Office (DS-DE 25), (4) Affidavit of Intent Special District Candidate and must also be a qualified elector of the District. **A qualified elector**, as defined in the Act, is an individual who is: at least 18 years of age who is a citizen of the United States, a legal resident of Florida and of the Ave Maria Stewardship Community District and who registers to vote with the Supervisor of Elections in Collier County. Candidates may contact the District Manager for the required qualification documents. All required qualification materials must be received by at the offices of the District Manager on or before the conclusion of the qualifying period.

The **Ave Maria Stewardship Community District** has **one (1) Seat** up for election this year, specifically **Seat No. 3**. Seat No. 3 carries a **four-year term** of office. The election is nonpartisan and is set for **April 25, 2017, from noon until 7:00 p.m. (EST)** at the Ave Maria Master Association located at 5076 Annunciation Circle, Suite 103, Ave Maria, Florida 34142.

**AVE MARIA STEWARDSHIP COMMUNITY DISTRICT**

**[www.avemariastewardshipcd.org](http://www.avemariastewardshipcd.org)**

**PUBLISH: NAPLES DAILY NEWS \_\_\_\_\_**

**[Publish two times, first publication no later than March 14, 2017]**

Exhibit B

**NOTICE OF SPECIAL ELECTION  
FOR SEAT 3 OF THE  
BOARD OF SUPERVISORS OF THE  
AVE MARIA STEWARDSHIP COMMUNITY DISTRICT**

In accordance with Chapter 2004-461, Laws of Florida, (the “Act”) and Section 189.04, Florida Statutes, notice is hereby given that the **Ave Maria Stewardship Community District will hold a special election** at which qualified electors may vote for the purpose of electing a qualified elector to Seat No. 3 of the Board of Supervisor of the **Ave Maria Stewardship Community District**. The special election will be held on **April 25, 2017, from noon until 7:00 p.m. (EST)** at the Ave Maria Master Association located at 5076 Annunciation Circle, Suite 103, Ave Maria, Florida 34142. **A qualified elector**, as defined in the Act, is an individual who is: at least 18 years of age who is a citizen of the United States, a legal resident of Florida and of the Ave Maria Stewardship Community District and who registers to vote with the Supervisor of Elections in Collier County.

Voters shall be required to present current and valid picture identification and voter’s registration card or other evidence of voter registration prior to voting. In accordance with the provisions of the Americans with Disabilities Act, any person requiring special accommodations or an interpreter to participate at the special election should contact the District Manager at **561-630-4922 and/or toll free at 1-577-737-4922**.

**AVE MARIA STEWARDSHIP COMMUNITY DISTRICT**

**www.avemariastewardshipcd.org**

**PUBLISH: NAPLES DAILY NEWS \_\_\_\_\_**

**[Publish two times, first publication no later than March 24, 2017, second publication no later than April 7, 2017.]**

**Exhibit C**  
**Loyalty Oath for Non-Partisan Office**

<b>CANDIDATE OATH – NONPARTISAN OFFICE</b>  (Not for use by Judicial or School Board Candidates)	<b>OFFICE USE ONLY</b>										
<b>OATH OF CANDIDATE</b> (Section 99.021, Florida Statutes)											
<p>I, _____ <small>(PLEASE PRINT NAME AS YOU WISH IT TO APPEAR ON THE BALLOT * – NAME MAY NOT BE CHANGED AFTER THE END OF QUALIFYING)</small></p> <p>am a candidate for the nonpartisan office of _____, _____ <span style="display: block; text-align: center;"><small>(office)</small></span><span style="display: block; text-align: right;"><small>(district #)</small></span></p> <p>_____, _____; I am a qualified elector of _____ County, Florida; <span style="display: block; text-align: center;"><small>(precinct #)</small></span><span style="display: block; text-align: center;"><small>(group or seat #)</small></span></p> <p>I am qualified under the Constitution and the Laws of Florida to hold the office to which I desire to be nominated or elected; I have qualified for no other public office in the state, the term of which office or any part thereof runs concurrent with the office I seek; and I have resigned from any office from which I am required to resign pursuant to Section 99.012, Florida Statutes; and I will support the Constitution of the United States and the Constitution of the State of Florida.</p> <table style="width: 100%; border: none;"><tr><td style="width: 40%; text-align: center; vertical-align: bottom;"><b>X</b></td><td style="width: 20%; text-align: center; vertical-align: bottom;">(   )</td><td style="width: 40%;"></td></tr><tr><td style="text-align: center;">Signature of Candidate</td><td style="text-align: center;">Telephone Number</td><td style="text-align: center;">Email Address</td></tr></table> <table style="width: 100%; border: none;"><tr><td style="width: 30%;">Address _____</td><td style="width: 20%;">City _____</td><td style="width: 20%;">State _____</td><td style="width: 30%;">ZIP Code _____</td></tr></table>		<b>X</b>	(   )		Signature of Candidate	Telephone Number	Email Address	Address _____	City _____	State _____	ZIP Code _____
<b>X</b>	(   )										
Signature of Candidate	Telephone Number	Email Address									
Address _____	City _____	State _____	ZIP Code _____								
Candidate's Florida Voter Registration Number (located on your voter information card): _____											
* Please print name phonetically on the line below as you wish it to be pronounced on the audio ballot for persons with disabilities (see instructions on page 2 of this form): _____											
<b>STATE OF FLORIDA</b> <b>COUNTY OF</b> _____											
Sworn to (or affirmed) and subscribed before me this _____ day of _____, 20____.											
Personally Known: _____ or  Produced Identification: _____  Type of Identification Produced: _____	_____ <b>Signature of Notary Public</b> Print, Type, or Stamp Commissioned Name of Notary Public										

# INSTRUCTIONS: INSERTING PHONETIC SPELLING OF CANDIDATE'S NAME FOR AUDIO BALLOT

Use the PRONUNCIATION KEY below to provide pronunciations for ambiguous first names and surnames. Capitalize STRESSED syllables, use lower case for unstressed syllables. Use dashes (-) to separate syllables. You should also add any notes such as rhyming examples, silent letters, etc.

## Samples:

PRONUNCIATION KEY	
Stressed Vowel Sounds	
EE	(FEET) feet
I	(FIT) fit
E	(BED) bed
A	(KAT) cat (KAD) cad
AH	(FAH-thur) father (PAHR) par
AH	(HAHT) hot (TAH-dee) toddy
UH	(FUHU) fudge (FLUHD) flood
UH	(CHUHRCH) church
AW	(FAWN) fawn
U	(FUL) full
OO	(FOOD) food
OU	(FOUND) found
O	(FO) foe
EI	(FEIT) fight
AI	(FAIT) fate
OI	(FOIL) foil
YOO	(FYOOOR-ee-uhs) furious

NAME ON BALLOT	PRONOUNCED AS
Mishaud	mee-GHO ('d' is silent)
Jahn	HAHN (rhyme: fawn)
Beauprez	boo-PRAI (rhyme: hooray)
Maniscalco	man-uh-SKAL-ko
Tangipahoa	TAN-j-pah-HO-uh
Monte	Mahn-TAI
Tanya	TAWN-yuh (not TAN)

Unstressed Vowel Sounds	
uh	(SO-fuh) sofa (FING-guhr) finger

Certain Vowel Sounds with R	
AHR	(PAHR) par
ER	(PER) pair
IR	(PIR) peer
OR	(POR) pour
OOR	(POOR) poor
UHR	(PUHR) purr

Consonant Sounds			
B	(BED) bed	TS	(ITS) its (PITS-feeld) Pittsfield
D	(DET) debt	TH	(THEI) thigh
F	(FED) fed	TH	(THEI) thy
G	(GET) get	ZH	(A-zhuhr) azure (VI-zhuhn) vision
H	(HED) head	Z	(GOODZ) goods (HUH-buhz-tuhn) Hubbardston
HW	(HWICH) which		
J	(JUHG) jug		
K	(KAD) cad		
L	(LAIM) lame		
M	(MAT) mat		
N	(NET) net		
NG	(SING-uh) singer		
P	(PET) pet		
R	(RED) red		
S	(SET) set		
T	(TEN) ten		
V	(VET) vet		
Y	(YET) yet		
W	(WICH) witch		
CH	(CHUCRCH) church		
SH	(SHEEP) sheep		

NOTE: This page should not be submitted to the filing officer.

**Exhibit D**  
**Form 1 Disclosure of Financial Interests**

<b>FORM 1</b>		<b>STATEMENT OF</b>		<b>2016</b>	
Please print or type your name, mailing address, agency name, and position below:			FOR OFFICE USE ONLY:		
LAST NAME – FIRST NAME – MIDDLE NAME :					
MAILING ADDRESS :					
CITY : ZIP : COUNTY :					
NAME OF AGENCY :					
NAME OF OFFICE OR POSITION HELD OR SOUGHT :					
You are not limited to the space on the lines on this form. Attach additional sheets, if necessary.					
CHECK ONLY IF <input type="checkbox"/> CANDIDATE OR <input type="checkbox"/> NEW EMPLOYEE OR APPOINTEE					
<b>**** BOTH PARTS OF THIS SECTION MUST BE COMPLETED ****</b>					
<b>DISCLOSURE PERIOD:</b> THIS STATEMENT REFLECTS YOUR FINANCIAL INTERESTS FOR THE PRECEDING TAX YEAR, WHETHER BASED ON A CALENDAR YEAR OR ON A FISCAL YEAR. PLEASE STATE BELOW WHETHER THIS STATEMENT IS FOR THE PRECEDING TAX YEAR ENDING EITHER (must check one): <div style="display: flex; justify-content: space-between; align-items: center;"> <span><input type="checkbox"/> DECEMBER 31, 2016</span> <span><u>OR</u></span> <span><input type="checkbox"/> SPECIFY TAX YEAR IF OTHER THAN THE CALENDAR YEAR: _____</span> </div>					
<b>MANNER OF CALCULATING REPORTABLE INTERESTS:</b> FILERS HAVE THE OPTION OF USING REPORTING THRESHOLDS THAT ARE ABSOLUTE DOLLAR VALUES, WHICH REQUIRES FEWER CALCULATIONS, OR USING COMPARATIVE THRESHOLDS, WHICH ARE USUALLY BASED ON PERCENTAGE VALUES (see instructions for further details). CHECK THE ONE YOU ARE USING (must check one): <div style="display: flex; justify-content: space-between; align-items: center;"> <span><input type="checkbox"/> COMPARATIVE (PERCENTAGE) THRESHOLDS</span> <span><u>OR</u></span> <span><input type="checkbox"/> DOLLAR VALUE THRESHOLDS</span> </div>					
<b>PART A – PRIMARY SOURCES OF INCOME</b> [Major sources of income to the reporting person - See instructions] (If you have nothing to report, write "none" or "n/a")					
NAME OF SOURCE OF INCOME	SOURCE'S ADDRESS	DESCRIPTION OF THE SOURCE'S PRINCIPAL BUSINESS ACTIVITY			
<b>PART B – SECONDARY SOURCES OF INCOME</b> [Major customers, clients, and other sources of income to businesses owned by the reporting person - See instructions] (If you have nothing to report, write "none" or "n/a")					
NAME OF BUSINESS ENTITY	NAME OF MAJOR SOURCES OF BUSINESS' INCOME	ADDRESS OF SOURCE	PRINCIPAL BUSINESS ACTIVITY OF SOURCE		
<b>PART C – REAL PROPERTY</b> [Land, buildings owned by the reporting person - See instructions] (If you have nothing to report, write "none" or "n/a")				<b>FILING INSTRUCTIONS</b> for when and where to file this form are located at the bottom of page 2.  <b>INSTRUCTIONS</b> on who must file this form and how to fill it out begin on page 3.	

<b>PART D — INTANGIBLE PERSONAL PROPERTY</b> [Stocks, bonds, certificates of deposit, etc. - See instructions] (If you have nothing to report, write "none" or "n/a")		
TYPE OF INTANGIBLE	BUSINESS ENTITY TO WHICH THE PROPERTY RELATES	
<b>PART E — LIABILITIES</b> [Major debts - See instructions] (If you have nothing to report, write "none" or "n/a")		
NAME OF CREDITOR	ADDRESS OF CREDITOR	
<b>PART F — INTERESTS IN SPECIFIED BUSINESSES</b> [Ownership or positions in certain types of businesses - See instructions] (If you have nothing to report, write "none" or "n/a")		
NAME OF BUSINESS ENTITY	BUSINESS ENTITY # 1	BUSINESS ENTITY # 2
ADDRESS OF BUSINESS ENTITY		
PRINCIPAL BUSINESS ACTIVITY		
POSITION HELD WITH ENTITY		
I OWN MORE THAN A 5% INTEREST IN THE BUSINESS		
NATURE OF MY OWNERSHIP INTEREST		
<b>PART G — TRAINING</b> For elected municipal officers required to complete annual ethics training pursuant to section 112.3142, F.S.		
<input type="checkbox"/> I CERTIFY THAT I HAVE COMPLETED THE REQUIRED TRAINING.		
IF ANY OF PARTS A THROUGH G ARE CONTINUED ON A SEPARATE SHEET, PLEASE CHECK HERE <input type="checkbox"/>		
<b>SIGNATURE OF FILER:</b>  Signature: _____  Date Signed: _____	<b>CPA or ATTORNEY SIGNATURE ONLY</b> If a certified public accountant licensed under Chapter 473, or attorney in good standing with the Florida Bar prepared this form for you, he or she must complete the following statement: I, _____, prepared the CE Form 1 in accordance with Section 112.3145, Florida Statutes, and the instructions to the form. Upon my reasonable knowledge and belief, the disclosure herein is true and correct.  CPA/Attorney Signature: _____ Date Signed: _____	
<b>FILING INSTRUCTIONS:</b>		
<b>WHAT TO FILE:</b> After completing all parts of this form, <u>including signing and dating it</u> , send back only the first sheet (pages 1 and 2) for filing.  If you have nothing to report in a particular section, write "none" or "n/a" in that section(s).  <b>NOTE:</b> <b>MULTIPLE FILING UNNECESSARY:</b> A candidate who files a Form 1 with a qualifying officer is not required to file with the Commission or Supervisor of Elections.  <u>Facsimiles will not be accepted.</u>	<b>WHERE TO FILE:</b> If you were mailed the form by the Commission on Ethics or a County Supervisor of Elections for your annual disclosure filing, return the form to that location.  <b>Local officers/employees</b> file with the Supervisor of Elections of the county in which they permanently reside. (If you do not permanently reside in Florida, file with the Supervisor of the county where your agency has its headquarters.)  <b>State officers or specified state employees</b> file with the Commission on Ethics, P.O. Drawer 15709, Tallahassee, FL 32317-5709; physical address: 325 John Knox Road, Building E, Suite 200, Tallahassee, FL 32303.  <b>Candidates</b> file this form together with their qualifying papers.  To determine what category your position falls under, see page 3 of instructions.	<b>WHEN TO FILE:</b> <b>Initially</b> , each local officer/employee, state officer, and specified state employee must file <u>within 30 days</u> of the date of his or her appointment or of the beginning of employment. Appointees who must be confirmed by the Senate must file prior to confirmation, even if that is less than 30 days from the date of their appointment. <b>Candidates</b> must file at the same time they file their qualifying papers. <b>Thereafter</b> , file by July 1 following each calendar year in which they hold their positions. <b>Finally</b> , file a final disclosure form (Form 1F) within 60 days of leaving office or employment. Filing a CE Form 1F (Final Statement of Financial Interests) does <u>not</u> relieve the filer of filing a CE Form 1 if the filer was in his or her position on December 31, 2016.



## NOTICE

Annual Statements of Financial Interests are due July 1. If the annual form is not filed or postmarked by September 1, an automatic fine of \$25 for each day late will be imposed, up to a maximum penalty of \$1,500. Failure to file also can result in removal from public office or employment. [s. 112.3145, F.S.]

In addition, failure to make any required disclosure constitutes grounds for and may be punished by one or more of the following: disqualification from being on the ballot, impeachment, removal or suspension from office or employment, demotion, reduction in salary, reprimand, or a civil penalty not exceeding \$10,000. [s. 112.317, F.S.]

## WHO MUST FILE FORM 1:

- 1) Elected public officials not serving in a political subdivision of the state and any person appointed to fill a vacancy in such office, unless required to file full disclosure on Form 5.
- 2) Appointed members of each board, commission, authority, or council having statewide jurisdiction, excluding members of solely advisory bodies, but including judicial nominating commission members; Directors of Enterprise Florida, Scripps Florida Funding Corporation, and Career Source Florida; and members of the Council on the Social Status of Black Men and Boys; the Executive Director, Governors, and senior managers of Citizens Property Insurance Corporation; Governors and senior managers of Florida Workers' Compensation Joint Underwriting Association; board members of the Northeast Fla. Regional Transportation Commission; members of the board of Triumph Gulf Coast, Inc.; members of the board of Florida Is For Veterans, Inc.; and members of the Technology Advisory Council within the Agency for State Technology.
- 3) The Commissioner of Education, members of the State Board of Education, the Board of Governors, and the local Boards of Trustees and Presidents of state universities.
- 4) Persons elected to office in any political subdivision (such as municipalities, counties, and special districts) and any person appointed to fill a vacancy in such office, unless required to file Form 6.
- 5) Appointed members of the following boards, councils, commissions, authorities, or other bodies of county, municipality, school district, independent special district, or other political subdivision: the governing body of the subdivision; community college or junior college district boards of trustees; boards having the power to enforce local code provisions; boards of adjustment; community redevelopment agencies; planning or zoning boards having the power to recommend, create, or modify land planning or zoning within a political subdivision, except for citizen advisory committees, technical coordinating committees, and similar groups who only have the power to make recommendations to planning or zoning boards, and except for representatives of a military installation acting on behalf of all military installations within that jurisdiction; pension or retirement boards empowered to invest pension or retirement funds or determine entitlement to or amount of pensions or other retirement benefits.
- 6) Any appointed member of a local government board who is required to file a statement of financial interests by the appointing authority or the enabling legislation, ordinance, or resolution creating the board.
- 7) Persons holding any of these positions in local government: mayor, county or city manager, chief administrative employee or finance director of a county, municipality, or other political subdivision; county or municipal attorney; chief county or municipal building inspector; county or municipal water resources coordinator; county or municipal pollution control director; county or municipal environmental control director; county or municipal administrator with power to grant or deny a land development permit; chief of police; fire chief; municipal clerk; appointed district school superintendent; community college president; district medical examiner; purchasing agent (regardless of title) having the authority to make any purchase exceeding \$20,000 for the local governmental unit.
- 8) Officers and employees of entities serving as chief administrative officer of a political subdivision.
- 9) Members of governing boards of charter schools operated by a city or other public entity.
- 10) Employees in the office of the Governor or of a Cabinet member who are exempt from the Career Service System, excluding secretarial, clerical, and similar positions.
- 11) The following positions in each state department, commission, board, or council: Secretary, Assistant or Deputy Secretary, Executive Director, Assistant or Deputy Executive Director, and anyone having the power normally conferred upon such persons, regardless of title.
- 12) The following positions in each state department or division: Director, Assistant or Deputy Director, Bureau Chief, Assistant Bureau Chief, and any person having the power normally conferred upon such persons, regardless of title.
- 13) Assistant State Attorneys, Assistant Public Defenders, criminal conflict and civil regional counsel, and assistant criminal conflict and civil regional counsel, Public Counsel, full-time state employees serving as counsel or assistant counsel to a state agency, administrative law judges, and hearing officers.
- 14) The Superintendent or Director of a state mental health institute established for training and research in the mental health field, or any major state institution or facility established for corrections, training, treatment, or rehabilitation.
- 15) State agency Business Managers, Finance and Accounting Directors, Personnel Officers, Grant Coordinators, and purchasing agents (regardless of title) with power to make a purchase exceeding \$20,000.
- 16) The following positions in legislative branch agencies: each employee (other than those employed in maintenance, clerical, secretarial, or similar positions and legislative assistants exempted by the presiding officer of their house); and each employee of the Commission on Ethics.

## INSTRUCTIONS FOR COMPLETING FORM 1:

**INTRODUCTORY INFORMATION** (Top of Form): If your name, mailing address, public agency, and position are already printed on the form, you do not need to provide this information unless it should be changed. To change any of this information, write the correct information on the form, and contact your agency's financial disclosure coordinator. You can find your coordinator on the Commission on Ethics website: [www.ethics.state.fl.us](http://www.ethics.state.fl.us).

**NAME OF AGENCY:** The name of the governmental unit which you serve or served, by which you are or were employed, or for which you are a candidate.

**OFFICE OR POSITION HELD OR SOUGHT:** The title of the office or position you hold, are seeking, or held during the disclosure period even if you have since left that position. If you are a candidate for office or are a new employee or appointee, check the appropriate box.

**PUBLIC RECORD:** The disclosure form and everything attached to it is a public record. Your Social Security Number is not required and you should redact it from any documents you file. If you are an active or former officer or employee listed in Section 119.071, F.S., whose home address is exempt from disclosure, the Commission will maintain that confidentiality if you submit a written request.

**DISCLOSURE PERIOD:** The tax year for most individuals is the calendar year (January 1 through December 31). If that is the case for you, then your financial interests should be reported for the calendar year 2016; check that box. If you file your IRS tax return based on a tax year that is not the calendar year, you should specify the dates of your tax year in this portion of the form and check the appropriate box. This is the "disclosure period" for your report.

## MANNER OF CALCULATING REPORTABLE INTEREST

Filers have the option of reporting based on either thresholds that are comparative (usually, based on percentage values) or thresholds that are based on absolute dollar values. The instructions on the following pages specifically describe the different thresholds. Check the box that reflects the choice you have made. You must use the type of threshold you have chosen for each part of the form. In other words, if you choose to report based on absolute dollar value thresholds, you cannot use a percentage threshold on any part of the form.

### IF YOU HAVE CHOSEN DOLLAR VALUE THRESHOLDS THE FOLLOWING INSTRUCTIONS APPLY

#### PART A — PRIMARY SOURCES OF INCOME

[Required by s. 112.3145(3)(b)1, F.S.]

Part A is intended to require the disclosure of your principal sources of income during the disclosure period. You do not have to disclose the amount of income received, and you need not list your public salary from serving in the position(s) which requires you to file this form. The income of you and your spouse need not be disclosed; however, if there is joint income to you and your spouse from property you own jointly (such as interest or dividends from a bank account or stocks), you should disclose the source of that income if it exceeded the threshold.

Please list in this part of the form the name, address, and principal business activity of each source of your income which exceeded \$2,500 of gross income received by you in your own name or by any other person for your use or benefit.

"Gross Income" means the same as it does for income tax purposes, even if the income is not actually taxable, such as interest on tax-free bonds. Examples include: compensation for services, income from business, gains from property dealings, interest, rents, dividends, pensions, IRA distributions, social security, distributive share of partnership gross income, and alimony, but not child support.

Examples:

- If you were employed by a company that manufactures computers and received more than \$2,500, list the name of the company, its address, and its principal business activity (computer manufacturing).
- If you were a partner in a law firm and your distributive share of partnership gross income exceeded \$2,500, list the name of the firm, its address, and its principal business activity (practice of law).
- If you were the sole proprietor of a retail gift business and your gross income from the business exceeded \$2,500, list the name of the business, its address, and its principal business activity (retail gift sales).
- If you received income from investments in stocks and bonds, list each individual company from which you derived more than \$2,500. Do not aggregate all of your investment income.
- If more than \$2,500 of your gross income was gain from the sale of property (not just the selling price), list as a source of income the purchaser's name, address and principal business activity. If the purchaser's identity is unknown, such as where securities listed on an exchange are sold through a brokerage firm, the source of income should be listed as "sale of (name of company) stock," for example.
- If more than \$2,500 of your gross income was in the form of interest from one particular financial institution (aggregating interest from all CD's, accounts, etc., at that institution), list the name of the institution, its address, and its principal business activity.

#### PART B — SECONDARY SOURCES OF INCOME

[Required by s. 112.3145(3)(b)2, F.S.]

This part is intended to require the disclosure of major customers, clients, and other sources of income to businesses in which you own an interest. It is not for reporting income from second jobs. That kind of income should be reported in Part A "Primary Sources of Income," if it meets the reporting threshold. You will not have anything to report unless, during the disclosure period:

- (1) You owned (either directly or indirectly in the form of an equitable or beneficial interest) more than 5% of the total assets or capital stock of

a business entity (a corporation, partnership, LLC, limited partnership, proprietorship, joint venture, trust, firm, etc., doing business in Florida); and,

- (2) You received more than \$5,000 of your gross income during the disclosure period from that business entity.

If your interests and gross income exceeded these thresholds, then for that business entity you must list every source of income to the business entity which exceeded 10% of the business entity's gross income (computed on the basis of the business entity's most recently completed fiscal year), the source's address, and the source's principal business activity.

Examples:

- You are the sole proprietor of a dry cleaning business, from which you received more than \$5,000. If only one customer, a uniform rental company, provided more than 10% of your dry cleaning business, you must list the name of the uniform rental company, its address, and its principal business activity (uniform rentals).
- You are a 20% partner in a partnership that owns a shopping mall and your partnership income exceeded the above thresholds. List each tenant of the mall that provided more than 10% of the partnership's gross income and the tenant's address and principal business activity.

#### PART C — REAL PROPERTY

[Required by s. 112.3145(3)(b)3, F.S.]

In this part, list the location or description of all real property in Florida in which you owned directly or indirectly at any time during the disclosure period in excess of 5% of the property's value. You are not required to list your residences. You should list any vacation homes if you derive income from them.

Indirect ownership includes situations where you are a beneficiary of a trust that owns the property, as well as situations where you own more than 5% of a partnership or corporation that owns the property. The value of the property may be determined by the most recently assessed value for tax purposes, in the absence of a more current appraisal.

The location or description of the property should be sufficient to enable anyone who looks at the form to identify the property. A street address should be used, if one exists.

#### PART D — INTANGIBLE PERSONAL PROPERTY

[Required by s. 112.3145(3)(b)3, F.S.]

Describe any intangible personal property that, at any time during the disclosure period, was worth more than \$10,000 and state the business entity to which the property related. Intangible personal property includes things such as cash on hand, stocks, bonds, certificates of deposit, vehicle leases, interests in businesses, beneficial interests in trusts, money owed you, Deferred Retirement Option Program (DROP) accounts, the Florida Prepaid College Plan, and bank accounts. Intangible personal property also includes investment products held in IRAs, brokerage accounts, and the Florida College Investment Plan. Note that the product contained in a brokerage account, IRA, or the Florida College Investment Plan is your asset—not the account or plan itself. Things like automobiles and houses you own, jewelry, and paintings are not intangible property. Intangibles relating to the same business entity may be aggregated; for example, CDs and savings accounts with the same bank. Property owned as tenants by the entirety or as joint tenants with right of survivorship should be valued at 100%. The value of a leased vehicle is the vehicle's present value minus the lease residual (a number found on the lease document).



## PART E — LIABILITIES

[Required by s. 112.3145(3)(b)4, F.S.]

List the name and address of each creditor to whom you owed more than \$10,000 at any time during the disclosure period. The amount of the liability of a vehicle lease is the sum of any past-due payments and all unpaid prospective lease payments. You are not required to list the amount of any debt. You do not have to disclose credit card and retail installment accounts, taxes owed (unless reduced to a judgment), indebtedness on a life insurance policy owed to the company of issuance, or contingent liabilities. A "contingent liability" is one that will become an actual liability only when one or more future events occur or fail to occur, such as where you are liable only as a guarantor, surety, or endorser on a promissory note. If you are a "co-maker" and are jointly liable or jointly and severally liable, then it is not a contingent liability.

## PART F — INTERESTS IN SPECIFIED BUSINESSES

[Required by s. 112.3145(5), F.S.]

The types of businesses covered in this disclosure include: state and federally chartered banks; state and federal savings and loan associations; cemetery companies; insurance companies; mortgage companies; credit unions; small loan companies; alcoholic beverage licensees; pari-mutuel wagering companies; utility companies; entities controlled by the Public Service Commission; and entities granted a franchise to operate by either a city or a county government.

Disclose in this part the fact that you owned during the disclosure period an interest in, or held any of certain positions with the types of businesses listed above. You must make this disclosure if you own or owned (either directly or indirectly in the form of an equitable or beneficial interest) at any time during the disclosure period more than 5% of the total assets or capital stock of one of the types of business entities listed above. You also must complete this part of the form for each of these types of businesses for which you are, or were at any time during the disclosure period, an officer, director, partner, proprietor, or agent (other than a resident agent solely for service of process).

If you have or held such a position or ownership interest in one of these types of businesses, list the name of the business, its address and principal business activity, and the position held with the business (if any). If you own(ed) more than a 5% interest in the business, indicate that fact and describe the nature of your interest.

## PART G — TRAINING CERTIFICATION

[Required by s. 112.3142, F.S.]

If you are a Constitutional or elected municipal officer whose service began before March 31 of the year for which you are filing, you are required to complete four hours of ethics training which addresses Article II, Section 8 of the Florida Constitution, the Code of Ethics for Public Officers and Employees, and the public records and open meetings laws of the state. You are required to certify on this form that you have taken such training.

(End of Dollar Value Thresholds Instructions.)

# IF YOU HAVE CHOSEN COMPARATIVE (PERCENTAGE) THRESHOLDS THE FOLLOWING INSTRUCTIONS APPLY

## PART A — PRIMARY SOURCES OF INCOME

[Required by s. 112.3145(3)(a)1, F.S.]

Part A is intended to require the disclosure of your principal sources of income during the disclosure period. You do not have to disclose the amount of income received, and you need not list your public salary received from serving in the position(s) which requires you to file this form, but this amount should be included when calculating your gross income for the disclosure period. The income of your spouse need not be disclosed; however, if there is joint income to you and your spouse from property you own jointly (such as interest or dividends from a bank account or stocks), you should include all of that income when calculating your gross income and disclose the source of that income if it exceeded the threshold.

Please list in this part of the form the name, address, and principal business activity of each source of your income which exceeded 5% of the gross income received by you in your own name or by any other person for your benefit or use during the disclosure period.

"Gross income" means the same as it does for income tax purposes, even if the income is not actually taxable, such as interest on tax-free bonds. Examples include: compensation for services, income from business, gains from property dealings, interest, rents, dividends, pensions, IRA distributions, social security, distributive share of partnership gross income, and alimony, but not child support.

Examples:

— If you were employed by a company that manufactures computers and received more than 5% of your gross income from the company, list the name of the company, its address, and its principal business activity (computer manufacturing).

— If you were a partner in a law firm and your distributive share of partnership gross income exceeded 5% of your gross income, then list the name of the firm, its address, and its principal business activity (practice of law).

— If you were the sole proprietor of a retail gift business and your gross income from the business exceeded 5% of your total gross income, list the name of the business, its address, and its principal business activity (retail gift sales).

— If you received income from investments in stocks and bonds, list each individual company from which you derived

more than 5% of your gross income. Do not aggregate all of your investment income.

— If more than 5% of your gross income was gain from the sale of property (not just the selling price), list as a source of income the purchaser's name, address, and principal business activity. If the purchaser's identity is unknown, such as where securities listed on an exchange are sold through a brokerage firm, the source of income should be listed as "sale of (name of company) stock," for example.

— If more than 5% of your gross income was in the form of interest from one particular financial institution (aggregating interest from all CD's, accounts, etc., at that institution), list the name of the institution, its address, and its principal business activity.

## PART B — SECONDARY SOURCES OF INCOME

[Required by s. 112.3145(3)(a)2, F.S.]

This part is intended to require the disclosure of major customers, clients, and other sources of income to businesses in which you own an interest. It is not for reporting income from second jobs. That kind of income should be reported in Part A, "Primary Sources of Income," if it meets the reporting threshold. You will not have anything to report unless during the disclosure period:

- (1) You owned (either directly or indirectly in the form of an equitable or beneficial interest) more than 5% of the total assets or capital stock of a business entity (a corporation, partnership, LLC, limited partnership, proprietorship, joint venture, trust, firm, etc., doing business in Florida); and,
- (2) You received more than 10% of your gross income from that business entity; and,
- (3) You received more than \$1,500 in gross income from that business entity.

If your interests and gross income exceeded these thresholds, then for that business entity you must list every source of income to the business entity which exceeded 10% of the business entity's gross income (computed on the basis of the business entity's most recently completed fiscal year), the source's address, and the source's principal business activity.

**Examples:**

— You are the sole proprietor of a dry cleaning business, from which you received more than 10% of your gross income—an amount that was more than \$1,500. If only one customer, a uniform rental company, provided more than 10% of your dry cleaning business, you must list the name of the uniform rental company, its address, and its principal business activity (uniform rentals).

— You are a 20% partner in a partnership that owns a shopping mall and your partnership income exceeded the thresholds listed above. You should list each tenant of the mall that provided more than 10% of the partnership's gross income, and the tenant's address and principal business activity.

**PART C — REAL PROPERTY**

[Required by s. 112.3145(3)(a)3, F.S.]

In this part, list the location or description of all real property in Florida in which you owned directly or indirectly at any time during the disclosure period in excess of 5% of the property's value. You are not required to list your residences. You should list any vacation homes, if you derive income from them.

Indirect ownership includes situations where you are a beneficiary of a trust that owns the property, as well as situations where you own more than 5% of a partnership or corporation that owns the property. The value of the property may be determined by the most recently assessed value for tax purposes, in the absence of a more current appraisal.

The location or description of the property should be sufficient to enable anyone who looks at the form to identify the property. A street address should be used, if one exists.

**PART D — INTANGIBLE PERSONAL PROPERTY**

[Required by s. 112.3145(3)(a)3, F.S.]

Describe any intangible personal property that, at any time during the disclosure period, was worth more than 10% of your total assets, and state the business entity to which the property related. Intangible personal property includes things such as cash on hand, stocks, bonds, certificates of deposit, vehicle leases, interests in businesses, beneficial interests in trusts, money owed you, Deferred Retirement Option Program (DROP) accounts, the Florida Prepaid College Plan, and bank accounts. Intangible personal property also includes investment products held in IRAs, brokerage accounts, and the Florida College Investment Plan. Note that the product contained in a brokerage account, IRA, or the Florida College Investment Plan is your asset—not the account or plan itself. Things like automobiles and houses you own, jewelry, and paintings are not intangible property. Intangibles relating to the same business entity may be aggregated; for example, CD's and savings accounts with the same bank.

Calculations: To determine whether the intangible property exceeds 10% of your total assets, total the fair market value of all of your assets (including real property, intangible property, and tangible personal property such as jewelry, furniture, etc.). When making this calculation, do not subtract any liabilities (debts) that may relate to the property. Multiply the total figure by 10% to arrive at the disclosure threshold. List only the intangibles that exceed this threshold amount. The value of a leased vehicle is the vehicle's present value minus the lease residual (a number which can be found on the lease document). Property that is only jointly owned property should be valued according to the percentage of your joint ownership. Property owned as tenants by the entirety or as joint tenants with right of survivorship should be valued at 100%. None of your calculations or the value of the property have to be disclosed on the form.

Example: You own 50% of the stock of a small corporation that is worth \$100,000, the estimated fair market value of your home and other property (bank accounts, automobile, furniture, etc.) is \$200,000. As your total assets are worth \$250,000, you must disclose intangibles worth over \$25,000. Since the value of the stock exceeds this threshold, you should list "stock" and the name of the corporation. If your accounts with a particular bank exceed \$25,000, you should list "bank accounts" and bank's name.

**PART E — LIABILITIES**

[Required by s. 112.3145(3)(b)4, F.S.]

List the name and address of each creditor to whom you owed any amount that, at any time during the disclosure period, exceeded your net worth. You are not required to list the amount of any debt or your net worth. You do not have to disclose: credit card and retail installment accounts, taxes owed (unless reduced to a judgment), indebtedness on a life insurance policy owed to the company of issuance, or contingent liabilities. A "contingent liability" is one that will become an actual liability only when one or more future events occur or fail to occur, such as where you are liable only as a guarantor, surety, or endorser on a promissory note. If you are a "co-maker" and are jointly liable or jointly and severally liable, it is not a contingent liability.

Calculations: To determine whether the debt exceeds your net worth, total all of your liabilities (including promissory notes, mortgages, credit card debts, judgments against you, etc.). The amount of the liability of a vehicle lease is the sum of any past-due payments and all unpaid prospective lease payments. Subtract the sum total of your liabilities from the value of all your assets as calculated above for Part D. This is your "net worth." List each creditor to whom your debt exceeded this amount unless it is one of the types of indebtedness listed in the paragraph above (credit card and retail installment accounts, etc.). Joint liabilities with others for which you are "jointly and severally liable," meaning that you may be liable for either your part or the whole of the obligation, should be included in your calculations at 100% of the amount owed.

Example: You owe \$15,000 to a bank for student loans, \$5,000 for credit card debts, and \$60,000 (with spouse) to a savings and loan for a home mortgage. Your home (owned by you and your spouse) is worth \$80,000 and your other property is worth \$20,000. Since your net worth is \$20,000 (\$100,000 minus \$80,000), you must report only the name and address of the savings and loan.

**PART F — INTERESTS IN SPECIFIED BUSINESSES**

[Required by s. 112.3145, F.S.]

The types of businesses covered in this disclosure include: state and federally chartered banks; state and federal savings and loan associations; cemetery companies; insurance companies; mortgage companies; credit unions; small loan companies; alcoholic beverage licensees; pari-mutuel wagering companies; utility companies, entities controlled by the Public Service Commission; and entities granted a franchise to operate by either a city or a county government.

Disclose in this part the fact that you owned during the disclosure period an interest in, or held any of certain positions with, the types of businesses listed above. You are required to make this disclosure if you own or owned (either directly or indirectly in the form of an equitable or beneficial interest) at any time during the disclosure period more than 5% of the total assets or capital stock of one of the types of business entities listed above. You also must complete this part of the form for each of these types of businesses for which you are, or were at any time during the disclosure period, an officer, director, partner, proprietor, or agent (other than a resident agent solely for service of process).

If you have or held such a position or ownership interest in one of these types of businesses, list the name of the business, its address and principal business activity, and the position held with the business (if any). If you own(ed) more than a 5% interest in the business, indicate that fact and describe the nature of your interest.

**PART G — TRAINING CERTIFICATION**

[Required by s. 112.3142, F.S.]

If you are a Constitutional or elected municipal officer whose service began before March 31 of the year for which you are filing, you are required to complete four hours of ethics training which addresses Article II, Section 8 of the Florida Constitution, the Code of Ethics for Public Officers and Employees, and the public records and open meetings laws of the state. You are required to certify on this form that you have taken such training.

(End of Percentage Thresholds Instructions.)

**Exhibit E**  
**District Affidavit of Intent**

Ave Maria Stewardship Community District Candidate

State of Florida  
County of Collier

I, \_\_\_\_\_ (print name), a candidate for the special district office of:  
Ave Maria Stewardship Community Development District Board of Supervisors, Seat 3, in the  
Special Election understand that my only campaign expense, from personal funds, shall be the \$25  
candidate-qualifying-fee.

I will not be required to: appoint a campaign treasurer, designate a campaign treasurer, designate a  
campaign depository or file periodic campaign treasurer's reports as required by Florida statutes  
99.061 or 106.07 and, therefore I am prohibited from collecting, soliciting, or accepting any money  
or contribution(s) in-kind, in connection with my campaign. I am also prohibited from making any  
expenditures on behalf of my candidacy.

In the event I later decide to collect, solicit, or accept any money or contribution(s) in-kind, or make  
any expenditure on behalf of my candidacy, I understand that I will be required to file Form DS-DE  
9 (Appointment of Campaign Treasurer/Designation of Campaign Depository) with the District  
Manager prior to such action. Upon filing form DS-DE 9 my campaign will then be subject to all  
provisions of Chapter 106, Florida Statutes, including the requirement to file periodic campaign  
treasurer's reports.

\_\_\_\_\_  
Signature of Candidate

\_\_\_\_\_  
Date

\_\_\_\_\_  
Address

\_\_\_\_\_  
Phone

\_\_\_\_\_  
City

\_\_\_\_\_  
Zip Code

\_\_\_\_\_  
Email Address

**Exhibit F**  
Form of Candidate Petition

**CANDIDATE PETITION**

**Notes:** - All information on this form becomes a public record upon receipt by the Supervisor of Elections.  
- It is a crime to knowingly sign more than one petition for a candidate. [Section 104.185, Florida Statutes]  
- If all requested information on this form is not completed, the form will not be valid as a Candidate Petition form.

I, \_\_\_\_\_ the undersigned, a registered voter  
(print name as it appears on your voter information card)  
in said state and county, petition to have the name of \_\_\_\_\_  
placed on the Special Election Ballot as a: [check/complete box, as applicable]

☒ Nonpartisan   ☐ No party affiliation   ☐ \_\_\_\_\_ Party   candidate for the office of

Ave Maria Stewardship Community District Board of Supervisors, Seat 3

(insert title of office and include district, circuit, group, seat number, if applicable)

Date of Birth   or   Voter Registration Number  
(MM/DD/YY)

Address

City

County

State

Zip Code

Signature of Voter

Date Signed (MM/DD/YY)  
[to be completed by Voter]