

January 17, 2020

John Manning
District One

Cecil L. Pendergrass
District Two

Ray Sandelli
District Three

Brian Hamman
District Four

Frank Mann
District Five

Roger Desjarlais
County Manager

Richard Wm. Wesch
County Attorney

Donna Marie Collins
Hearing Examiner

<<MAILING ADDRESS>>

RE: Burgundy Farms Road Paving CIP MSBU Assessment

Site Address: <<SITE ADDRESS>>

STRAP: <<STRAP No>>

Dear Property Owner,

Notice is hereby given that a Public Hearing will be held by the Board of County Commissioners in the Old Lee County Courthouse, 2120 Main Street, Fort Myers, Florida, on **Tuesday, February 18, 2020, at 9:30 a.m.**, concerning the Burgundy Farms Road Paving Municipal Service Benefit Unit. The purpose of the meeting will be to consider the adoption of a Resolution finalizing the capital project. The Resolution is entitled:

A RESOLUTION OF THE BOARD OF COUNTY COMMISSIONERS OF LEE COUNTY, FLORIDA, RATIFYING THE COMPLETION OF THE ACQUISITION AND CONSTRUCTION OF ASSESSABLE IMPROVEMENTS CONSTITUTING A PROJECT AS HEREIN DESCRIBED IN AS THE BURGUNDY FARMS ROAD PAVING CIP MUNICIPAL SERVICES BENEFIT UNIT; CONFIRMING A PRELIMINARY ASSESSMENT ROLL WITH RESPECT TO SUCH UNIT; PROVIDING FOR THE PAYMENT OF SPECIAL ASSESSMENTS AND ESTABLISHING THE NOT TO EXCEED INTEREST RATE SUCH ASSESSMENTS WILL BEAR; DIRECTING LEE COUNTY TO NOTIFY THE PROPERTY OWNERS OF THEIR FINAL ASSESSMENT AND RIGHT TO PREPAY; AND PROVIDING AN EFFECTIVE DATE.

The Burgundy Farms Road paving has been completed. The approved project cost was estimated to be \$489,532, and the final cost is \$460,937. The method of assessment is on a per front footage basis. We are pleased that the County is able to contribute \$92,187 to reduce the cost of the project per Administrative Code AC-3-25. **The final cost of the project to the property owners is \$368,749, or \$35.32 per foot.**

The Board of County Commissioners will be meeting as an Equalizing Board to hear any and all objections as to the special assessment and shall adjust and equalize the special assessments on a basis of justice and right. When so equalized and approved by

Resolution, such special assessments shall stand confirmed and remain legal, valid and binding first liens upon the property against which such special assessments are made until paid.

Should the proposed Resolution to Assess be adopted, you will have several options for payment; (a) within thirty (30) days after the Public Hearing approving the Resolution to Assess, you may pay your assessment **in full** without interest, or (b) repay your assessment over the next ten (10) years by paying one-tenth (1/10th) of your principal upon receiving your bill on the annual Tax Bill, and making all subsequent payments of one-tenth of the principal *plus financial charges and a calculated interest (interest rate is determined at the signing of the loan) on the unpaid balance on an annual basis as billed*. You may pay off your assessment at any time in the future with the accrued interest. A copy of a typical payment schedule is attached for your information. **An invoice will be mailed following the Public Hearing.**

In addition to the 20% contribution referenced earlier, Lee County offers two financial assistance programs to homesteaded property owners that are based on financial needs. The first program is a **25% Matching Grant**, in which the County will pay 25% of a homesteaded property owner's assessment meeting HUD 80% income levels. The second program is a **Hardship Deferral**, in which the County will defer the annual assessment due for those property owners that meet the established HUD 60% income levels, published each March. To participate in either, or both, programs you will need to submit the attached application with full income documentation for 2019. The Deferral Program is renewed yearly and you must reapply annually. In the first quarter of each year, active participants of the Deferral Program will be requested to submit a renewal application with financial documentation.

The Resolution confirming the Preliminary Assessment Roll, will provide the terms on which payments of special assessments may be made and will provide the rate of interest for the special assessments, which are not prepaid, will bear. Delinquent special assessments shall be collected as provided for by the Uniform Collection Method for Non-Ad Valorem Taxes.

The special assessments made as a result of the confirmation of the preliminary assessment roll will be final and conclusive as to each lot or parcel of property assessed unless proper steps are initiated within twenty (20) days of confirmation of the preliminary assessment roll in a court of competent jurisdiction to secure relief. You are advised that any person wishing to appeal any decision of the Board with respect to any matter considered would need a record and may need to ensure that a verbatim record is made.

This Public Hearing is an opportunity for you to express your opinion or you may wish to write a letter to the sender at P.O. Box 398, Fort Myers, Florida 33902. All correspondence received within twenty (20) days of this notice will become a part of the

Public Record. Lee County will not discriminate against individuals with disabilities. To request an accommodation, contact Joan LaGuardia, (239) 533-2314, Florida Relay Service 711, or jlguardia@leegov.com, at least five business days in advance of the Public Hearing.

If you have any questions, please do not hesitate to contact me at 239-533-2308 or tgard@leegov.com.

Sincerely,

Timothy Gard
MSTBU Coordinator

SAMPLE

STRAP	SITE ADDRESS	FRONT FOOTAGE	TOTAL	LEGAL
23462600000020010	19141 BURGUNDY FARMS RD	324	\$ 11,443.95	PARL IN W 1/2 OF NE 1/4 DESC OR 1481 PG 1251
23462600000020050	19641 BURGUNDY FARMS RD	630	\$ 22,252.12	PARL IN W1/2 OF SE1/4 AKA LOT 12 BURGUNDY FARMS UNR DESC IN OR2322/0911
23462600000020060	19640 BURGUNDY FARMS RD	630	\$ 22,252.12	PARL IN SE 1/4 OF SEC 23 T46 R26 DESC IN OR 1492 PG 1621
23462600000020070	19381 BURGUNDY FARMS RD	328	\$ 11,585.23	PARL IN SW 1/4 OF NE 1/4 DESC IN OR 1488 PG 1174 LESS PAR 2.007A + 2.007B
2346260000002007A	19431 BURGUNDY FARMS RD	327	\$ 11,549.91	W 1/2 OF THE S 1/4 OF E 1/2 OF W 1/2 OF NE 1/4
23462600000020090	19311 BURGUNDY FARMS RD	327	\$ 11,549.91	PARL SW 1/4 OF NE 1/4 DESC IN OR 1489 PG 1827
23462600000020100	19261 BURGUNDY FARMS RD	328	\$ 11,585.23	PARL IN SW 1/4 OF NE 1/4 DESC IN OR 1511 PG 815
23462600000020140	19030 BURGUNDY FARMS RD	330	\$ 11,655.87	PARL IN NW 1/4 OF NE 1/4 SEC 23 T46 R26 DESC IN OR 1514 PG 554
23462600000020150	19930 BURGUNDY FARMS RD	329	\$ 11,620.55	PARL IN W1/2 OF SE1/4 AS DESC OR 1523/1916 LESS OR 2015/1439 AKA LOT 1
2346260000002015A	19910 BURGUNDY FARMS RD	328	\$ 11,585.23	PARL IN W1/2 OF SE1/4 AKA LOT 3 BURGUNDY FARMS UNREC
23462600000020160	19931 BURGUNDY FARMS RD	329	\$ 11,620.55	S 1/2 OF SE 1/4 OF SW 1/4 OF SE 1/4 AKA LT 2 UNREC BURGUNDY FARMS
2346260000002016A	19911 BURGUNDY FARMS RD	328	\$ 11,585.23	N 1/2 OF SE 1/4 OF SW 1/4 OF SE 1/4 AKA LOT 4 UNREC BURGUNDY FARMS
23462600000020180	19851 BURGUNDY FARMS RD	328	\$ 11,585.23	PARL IN W 1/2 OF S E 1/4 AS DESC IN OR 1788 PG 4186 LOT 6 LESS 23.018A
23462600000020190	19730 BURGUNDY FARMS RD	328	\$ 11,585.23	PARL IN W 1/2 OF S E 1/4 AS DESC IN OR 1518 PG 328 AKA LOT 9
23462600000020200	19561 BURGUNDY FARMS RD	327	\$ 11,549.91	PARL IN W 1/2 OF S E 1/4 AS DESC IN OR 1523 PG 1910 AKA LOT 14
23462600000020210	19430 BURGUNDY FARMS RD	327	\$ 11,549.91	PARL IN W 1/2 OF N E 1/4 AS DESC IN OR 1516 PG 1002 AKA LOT 15
23462600000020220	19200 BURGUNDY FARMS RD	327	\$ 11,549.91	PARL IN W 1/2 OF N E 1/4 AS DESC IN OR 1516 PG 1002 AKA LOT 23
2346260000002024A	19031 BURGUNDY FARMS RD	330	\$ 11,655.87	PARL IN W1/2 OF NE1/4 AS DESC IN OR2215/2139 AKA PT LT30 BURGUNDY FARMS UNREC
23462600000020000	19270 BURGUNDY FARMS RD	164	\$ 5,792.61	W 1/2 OF E 1/2 LESS RD RW + LESS PARLS 2.001 THRU 2.026
23462600000020020	19310 BURGUNDY FARMS RD	327	\$ 11,549.91	PARL IN W 1/2 OF NE 1/4 DESC OR 1481 PG 1259
23462600000020030	19790 BURGUNDY FARMS RD	328	\$ 11,585.23	PARL IN SE 1/4 OF SEC 23 T 46 R 26 DESC IN OR 1511 PG 2133
23462600000020040	19731 BURGUNDY FARMS RD	328	\$ 11,585.23	PARL IN W1/2 OF SE1/4 AS DESC IN OR2434/1128 AKA LT 10 BURGUNDY FARMS UNREC
23462600000020080	19560 BURGUNDY FARMS RD	327	\$ 11,549.91	PARL IN NW 1/4 OF SE 1/4 SEC 23 T46 R26 DESC IN OR 1492 PG 1613
23462600000020110	19201 BURGUNDY FARMS RD	327	\$ 11,549.91	PARL IN NW 1/4 OF NE 1/4 SEC 23 T46 R26 DESC IN OR 1513 PG 2003
23462600000020120	19140 BURGUNDY FARMS RD	324	\$ 11,443.95	PARL IN NW 1/4 OF NE 1/4 SEC 23 T46 R26 DESC IN OR 1511 PG 801
23462600000020130	19091 BURGUNDY FARMS RD	331	\$ 11,691.19	PARL IN NW 1/4 OF NE 1/4 SEC 23 T46 R26 DESC IN OR 1501 PG 414
23462600000020170	19850 BURGUNDY FARMS RD	328	\$ 11,585.23	PARL IN W 1/2 OF S E 1/4 AS DESC IN OR 1518 PG 320 AKA LOT 5
2346260000002018A	19791 BURGUNDY FARMS RD	328	\$ 11,585.23	PARL IN W 1/2 OF SE 1/4 DESC IN OR 1792 PG 1421 LOT 8 BURGUNDY FARMS
23462600000020230	19090 BURGUNDY FARMS RD	331	\$ 11,691.19	PARL IN W 1/2 OF N E 1/4 AS DESC IN OR 1521 PG 306 AKA LOT 27
23462600000020250	19360 BURGUNDY FARMS RD	164	\$ 5,792.61	N 1/2 OF PARL IN W 1/2 OF NE 1/4 DESC IN OR 1754 PG 1178 PT LOT 17
2346260000002025A	19390 BURGUNDY FARMS RD	164	\$ 5,792.61	S 1/2 OF PARL IN W 1/2 OF NE 1/4 DESC IN OR 1754 PG 1175 PT LOT 17
23462600000020260	19250 BURGUNDY FARMS RD	164	\$ 5,792.61	N 1/2 OF PARL IN W 1/2 OF NE 1/4 DESC IN OR 1754 PG 1181 PT LOT 21

10,440 \$ 368,749.38

	Persons in Family							
	1	2	3	4	5	6	7	8
2019 Matching Grant Income Limits	\$37,600	\$43,000	\$48,350	\$53,700	\$58,000	\$62,300	\$66,600	\$70,900
2019 Hardship Deferral Income Limits	\$28,200	\$32,220	\$36,240	\$40,260	\$43,500	\$46,740	\$49,980	\$53,160

EXAMPLE OF A FIXED PRINCIPAL SCHEDULE

SAMPLE
ASSESSMENT: \$12,000.00
INTEREST: 5.80%
TERM: 10 years

Please Note: Interest Rate may change pending Bond or Loan rate at closing.

YEAR	PRINCIPAL	INTEREST	PAYMENT	ENDING BALANCE
2021	\$1,200.00	\$696.00	\$1,896.00	\$10,800.00
2022	\$1,200.00	\$626.40	\$1,826.40	\$9,600.00
2023	\$1,200.00	\$556.80	\$1,756.80	\$8,400.00
2024	\$1,200.00	\$487.20	\$1,687.20	\$7,200.00
2025	\$1,200.00	\$417.60	\$1,617.60	\$6,000.00
2026	\$1,200.00	\$348.00	\$1,548.00	\$4,800.00
2027	\$1,200.00	\$278.40	\$1,478.40	\$3,600.00
2028	\$1,200.00	\$208.80	\$1,408.80	\$2,400.00
2029	\$1,200.00	\$139.20	\$1,339.20	\$1,200.00
2030	\$1,200.00	\$69.60	\$1,269.60	\$0.00
TOTAL	\$12,000.00	\$3,828.00	\$15,828.00	

Please check the boxes below for the appropriate application type:

☐
☐

Hardship Deferral – Applications accepted March 1 through May 1 (of the current year)

Matching Grant – Applications due prior to the scheduled Final Public Hearing

☐
☐

New Application

Renewal

Owner of Record:

Address:

Daytime Phone:

STRAP Number:

Project Name:

Household Information

List names, ages, annual income and ALL sources of income (employer, pension, social security, interest, trusts, etc.) for all property owners and household members 18 years of age and older.

Number of People In Household: _____ Do you rent any portion of your primary residence? [] Yes [] No

Proof of Income is required – Include signed FULL copy of previous year's submitted tax return.

Name: _____ Age: _____ Gross Income: _____ Source of Income: _____

Name: _____ Age: _____ Gross Income: _____ Source of Income: _____

Name: _____ Age: _____ Gross Income: _____ Source of Income: _____

Name: _____ Age: _____ Gross Income: _____ Source of Income: _____

Name: _____ Age: _____ Gross Income: _____ Source of Income: _____

TOTAL GROSS HOUSEHOLD INCOME: _____

Do you have any unpaid/delinquent property taxes? [] Yes [] No If yes, what is the amount? _____

Do you have any other rental properties? [] Yes [] No If yes, what is the gross amount? _____

Rental Property Address(es):

Continue to Page 2



Application for Hardship Deferral / Matching Grant
For Homesteaded Property Owners Only

Other Assets

List any other assets such as trusts, pension plans, realty property, intangible property, or other. Attach supporting documentation.

I authorize sources mentioned herein to disclose any financial information pertaining to me from their records. I affirm that I am a full-time resident of Lee County, Florida living at the above stated address, which I own.

I further affirm that I have disclosed all income and assets of the household members, including but not limited to wages, social security, trusts, pension plans, stocks/bonds, and/or gifts.

For Hardship Deferrals Only: I also affirm that this application is for a temporary deferment for which I am responsible to reimburse in full. I agree that in consideration of this deferment, the special assessment will need to be paid in full when the property is sold, transferred, or refinanced. This assessment must be disclosed to the new party.

<hr/>	
Print Name of Property Owner	
<hr/>	
<hr/>	<hr/>
Signature of Property Owner	Date
<hr/>	<hr/>
Notary Signature	Date
<hr/>	<hr/>
ID Verification: Personally Known	ID
<hr/>	<hr/>

FOR OFFICE USE ONLY

Application Review: **Approved** _____ **Denied** _____ **Date** _____

Name: _____ **Title:** _____

Lee County Board of County Commissioners – MSTBU Services
P.O. Box 398 – 2115 Second Street – Fort Myers, FL 33902
Phone: (239) 533-2308

This document is public record, available for public inspection.