

Category		Questions	Answers
Category	Question	Answer	
Alliance Authority	Considering that not all Pelican Preserve residents are members of the Residents' Alliance, what makes the Residents' Alliance think that they have the legal right to speak for the entire community?	The Alliance's role is to ACT in the best interests of the PP Residents, and it has consistently done so over 15 years and over a wide range of issues including Developer issues with the City, Comcast price issues, relationships with City and County officials, water quality, Town Center budgeting, perimeter security, and multiple others. Now, as we are reaching the end of the PP development cycle, we have been focusing on transition issues concerning the Town Center and Community (Master) Association, and have been working to define and plan for these important future transitions. The potential transaction we are working to define with Lennar and a potential lender will be subject to the approval of the Master Association Board of Directors, post Master turnover. The Town Center Declaration allows the TC Owner to sell the TC to anyone they choose, whenever they choose. See TC Declaration Para 4.6. The TC Declaration also contains a provision (Para 9.20.1) to sell the TC to the Community (Master) Association, requiring only the decision of a majority of the Community (Master) Assoc Board members.	
Budget	Review of Current 2019 budget and last 3 years of actual revenue & expenses (with major categories detailed like personnel, Flip Flops, Destinations, utilities, taxes, service contracts/professional fees, etc. plus capital expenditures reinvested).	We have analyzed the financials to the best we were able and concluded that the 2019 budget, most fully represents the expected actual results to be experienced. In prior years, WCI/Lennar underwrote a portion of the budget & Lennar is no longer willing to continue that practice. We believe that by working more closely with our Management companies, we can negotiate better contracts while maintaining a high level of overall service.	
	Is the gatehouse operation part of the Town Center budget?	No, the gatehouse operation is part of the Gateway CDD budget which is overseen by the Master Association.	
	How is the consulting firm paid? Commission on sale? Commission on loan?	We are not using a consultant and have paid no fees or commissions. We are in process of negotiating with attorney and other professionals including the lenders.	
Control	If we do acquire, is there a need to establish a management board? Once we own the place, can we get a key fob for residents to work the fitness center 24/7?	After the purchase, The Master Association (Pelican Preserve Community (Master) Association) Board will manage the contract for Town Center operations. Once we own the place, the residents will have a voice through the Master Association to establish operating policies commensurate with the available funding and safe operating procedures. It would remain to be seen whether the unsupported 24/7 operation of the fitness center could be accommodated.	
Credentials	Please explain the academic credentials and work experience of all members on the TC purchase committee and those handling the negotiations	See Bios attached	

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Facility Concerns	Concerned about damages being done to the pavers as a result of top coating the pavement. The sewing room has a serious mold issue and it is going to cost \$\$\$ to fix and should be fixed prior to acquisition.	Ongoing maintenance should remediate any paver damage as a result of the top coating. A review of the history reveals that the sewing room has been examined several times and there is <u>no visible mold</u>. Two mold remediation companies have completed testing, including tearing out all of the drywall and replacing it. Unfortunately, for some as yet unknown reason, there is still an odor, but we cannot find actual mold. Additional remediation steps have included: changed the drains in the ceiling for the AC; added a dehumidifier to the room. Examinations from on-site and corporate maintenance personnel failed to identify a cause for the odor. <u>They did not find any mold</u>. This problem has existed since the building was opened up 16 years ago.
Finance	How are we going to finance the purchase? It has been stated many times that the cash flow from running the town center will be used as leverage to purchase the town Center and there will be no assessment or increase in fees. Does this still hold true? How can anyone forecast interest rates?	We are working to establish a single source of funding to purchase the Town Center. <u>Our objective is to require no Special Assessment and to pay for the TC purchase by using the TC Membership Fees, not the cash flow from operations</u>. As currently calculated, it is unlikely we will have to increase the TC Membership Fee beyond its historical rate of approximately 3% annually. The TC Operating Expense Fee will vary based upon what services and amenities residents demand. Obviously, no one can predict/control/determine what future interest rates might be at any particular moment. That does not mean that one cannot make a judgement about what their trend might be and act on that judgement.
	Can we, if we want, pay out the entire projected cost per owner up front or do we have to carry the cost over several years? If so a what interest rate.	Paying up front would require a Special assessment, which we are striving to avoid. Carrying the cost over several years allows future residents to contribute to the purchase, not just the current owners. We are working to capture the funding at the currently low interest rates available in the market.
	Is Lennar floating the residents' loan to buy the Town Center or another financial institution? How is the loan expected to be structured and terms?	No Lennar is NOT the lender for the loaned funds to purchase the Town Center. Loan details are currently in process from a single lender (bank).
HOA Fees	What is projected impact on taxes and HOA fees.	There is no identified negative impact to Community (Master) Association or neighborhood association HOA fees or taxes driven by this transaction.

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Operations Concerns	I do not like the current management being provided by Lennar and ICON. I am not satisfied with the quality of maintenance and operations at Town Center. Is it anticipated that we will keep the current management company and personnel?	Our current approach is to retain ICON as the property manager to minimize delay and disruption during the transition period. As we have previously stated, we have an objective of retaining the excellent TC staff and this certainly includes Terri Lollo as the TC Manger. Her leadership and engagement in the culture and performance of the Town Center is recognized by many as key to its success now and in the future. In order to facilitate communication of issues and sharing of constructive input we anticipate that an advisory group at the Community (Master) Association will be established and <u>we look forward to active community constructive participation.</u>
Other Competition	Will you give us the specific names of any others who would be likely to offer anything to Lennar to purchase the Town Center?	We have no specific names of others to provide.
People Management	Will Pelican Preserve residents have to manage the human resource aspect of this transaction? In other words, will we have to recruit, hire, fire, and manage HR benefits? If not by residents, then who will manage personnel? Would current employees be retained and managed by....?	No. The Management of Human Resources will be done by a professional management company under contract to the TC owner (Master Association after purchase). As we have previously stated, we have an objective of retaining the excellent TC staff and this certainly includes Terri Lollo as the TC Manger. Our current plan is to retain the current TC Management Company and current employees
Post Purchase	What is the renovation plan, inclusive of Capital Projects anticipated or required for next 5 years? How are the renovations to be paid for?	Detailed future renovation plans have not yet been developed. Long term plans will be developed post purchase. The 2019 plan is in place by Lennar. Future renovations, inclusive of capital projects and any re-use or re-purposing of existing facilities, will be controlled by the Master Board and paid for through TC Membership Fees and/or any reserves created as a part of this transaction.
Reserves	Has a reserve study been done for the Town Center, including the sales center? Where are those funds for the reserves coming from? Has a study of maintenance, repairs and replacement needs been done for the whole Town Center and sales center? What did it indicate and how will that affect the purchase price for the complex including the sales center. If Pelican Preserve residents purchase the Town Center, will the sale include all maintenance vehicles and equipment, building furnishings,	The Seller was not required to establish reserves. A professional Reserve Study is proposed to be completed after the Purchase has been completed. Funds for the reserves will come from ongoing TC Membership Fees and/or any reserves created as a part of this transaction. An initial assessment of facility maintenance needs was performed in 2018 and the results included in our financial model. The current TC owner (Lennar) has a commitment to ongoing repair/maintain the TC facilities and the Sales Center as they are still motivated to ensure they are attractive to new buyers as they complete buildout. The TC Declaration Para 9.20.2.4 states "The Town Center will be conveyed in an "As-Is, where is" condition WITHOUT ANY REPRESENTATION OR WARRANTY EXPRESS OR IMPLIED, IN FACT OR BY LAW, AS TO THE CONDITION, FITNESS OR MERCHANTABILITY OF THE PROPERTY BEING CONVEYED."It is expected that the purchase will include all of the maintenance vehicles and equipment, building furnishings,

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	etc.	etc. items owned by the TC in "as-is" condition. It is anticipated that a detailed inventory list will be verified as part of the pre-closing activities.
Resident Survey	When you surveyed Pelican Preserve residents for their opinion regarding this topic, did respondents include only Residence Alliance Members or every household in Pelican Preserve? You cite that 65% of survey respondents were in favor of purchasing the town center, but you did not say how many people responded? The question then is, how many people does that 65% actually represent? What is the denominator of that 65%?	The survey was emailed to all residents (2384 recipients). Total survey responses were 1006. Refer to the chart on page 57 of the March 27, 2018 Residents' Alliance Meeting which was emailed to the entire community in April 2018. Per the chart, the Denominator = 997.
Resident Vote	Will the residents have any say on whether to purchase early or have any input in this process	The Town Center Declaration allows the TC Owner to sell the TC to anyone they choose, whenever they choose. See TC Declaration Para 4.6. The TC Declaration also contains a provision (Para 9.20) to transfer/sell the TC to the Community (Master) Association, requiring only the decision of a majority of the Community (Master) Assoc Board members. The Master Board will decide to purchase the Town Center. There is NO resident vote.
Rumor	There is a rumor that Lennar is trying to sell the remaining undeveloped property. Is this true? Who are they selling it to? Will it be developed by the new owners?	We are unaware of any intentions by Lennar to sell the undeveloped property.
Sales Center	What are the plans for the Lennar Welcome Center once all homes are built out? When available, is the sales center part of the turnover, or will it be purchased?	The Pelican Preserve DRI (Master Plan) states the Sales Center will be converted for community use at buildout. There is no definition of what "converted" means. The Sales Center is not a part of the TC per the Legal Description. Neither the residents nor the Master Association purchases the Sales Center. Upon buildout

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	If the Sales Center is purchased separately from the Town Center, where will the money coming from? Where is the money coming from for renovations of the sales center once decisions have been made about its use? I understand the Sales Center in need of being remediated. Reserves needed. Will Lennar lease back sales center	completion, the community will assume control of costs of ownership and operation of this facility. Costs of any renovation will need to be provided by the Master Association. It is anticipated that future studies on the best use and costs of the Sales Center will need to be performed closer to the timeframe when this facility might realistically become available. Lennar lease back is not required since sales center transitions at Buildout.
Schedule	What is the realistic time-line that we can expect to see this happen if approved?	The detailed timeline is still under development. Our goal is to accomplish this transaction as soon as practicable this year.
Valuation	Are we obligated to purchase the Town Center? If yes, then explain the process of determining fair market value. Is there allowance for identified repairs needed to the amenities in the Town Center?	No, we are not obligated to purchase the Town Center, but it is believed to be in our best interests to do so to allow for resident control of costs and gain the benefits of any savings that we may achieve. The 2019 budget includes specified repairs/replacements and we are negotiating completion of certain previously scheduled repairs/replacements. Our projections include amounts to build reserve sums which will be used to fund Master Board approved repairs, replacements and additions/upgrades.
	Please explain in detail the valuation process and assumptions used to generate the committee's buy out price for the town center.	The valuation started from the TC declaration purchase price and was evolved to factor in the current state of community development, the profitability of the TC operations, likely future expansion and maintenance needs and the availability and types of funding. A financial model of operation was developed taking into account, expected build out rate and associated sales risk, community fees including delinquencies and costs projections at various fee adjustment rates, the need for reserves and contingency funds, Closing costs and due diligence fees, legal fees, the considerations required of the Master Association declaration and the type and structure of available financing.
	Will there be a good property inspector to point out deficiencies in the property?	A preliminary assessment by experienced facility operations personnel was performed in May 2018. We will be performing an assessment as part of the preparation for closing activities using a qualified inspector.
	Who established the formula to determine the market value of the Town Center facilities? What is that formula exactly? Is the formula a nationwide recognized standard used for such purposes? What is the projected purchase price, estimated is fine.	Yes – capitalization rate is a common metric for commercial property valuation. See https://www.investopedia.com/terms/c/capitalizationrate.asp for further explanation of this type of valuation approach. See TC declaration paragraph 4.6 and Section 9.20.2.1 for the establishment of the formula for computing price. The language translates into a formula as follows: At the time of the sale to the Community (Master) Association: Multiply the then current TC Membership Fee times the number of sold homes and divide that result by the TC declaration specified Capitalization Rate of 8.5%.

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		The specific purchase price number is not something that we are communicating during negotiations. However, we believe the number will be substantially less than the formula price at buildout.
Golf Course	Is there any discussion surrounding also purchasing the golf course and club as part of this transaction? I know that we only have about 400 members of the golf course while we will have more than 2500 residents when all "doors" are sold. Still, I feel that the golf course is an important part of our community and adds value to the community. Wouldn't it be a good idea to incorporate our discussions/negotiations for town center with negotiations for the purchase of the golf course. I am not suggesting that a non-member would experience any cost. I feel that when the two are coupled, we have the best chance/lowest price of purchasing our course and maintaining control of it. If the course is purchased by a private entity, there is a good chance that it will become public. This will change the tone and feel of our community and will no doubt effect property values.	Golf Membership is close to 500 members. The Golf Course and The Club are not part of the TC and are not controlled by any of the community governing documents and have not been a substantive topic of the TC purchase negotiation. Golf members and interested community members are encouraged to take the initiative to establish a dedicated team of members to engage in this evaluation. We believe Lennar may be interested in selling the golf course to the owners but that this transaction is very much more complicated than the purchase of TC as there is not broad membership and no available fees to underwrite its purchase.

CAROLE BROKKE

My husband and I were among the first residents of Pelican Preserve (Sun City) in December 2001. I served as secretary and Vice President for the Alliance during the years 2002-2004. I have been the President of the Alliance since April 2004 to the present time. It has been amazing to watch the Alliance grow from 30 members to over 1400 and it has been a privilege to work with so many members/volunteers that are unbelievably talented, and dedicated to serve and protect all the residents in our community.

Through the years, I have worked on a variety of issues with the many WCI Project Managers, Vice Presidents, Property Managers, and General Managers of our Amenities. A positive working relationship has been established with the City of Fort Myers Mayors, Councilmen, and City staff. The Alliance has had to deal with attorneys, hearing examiners, Waste Management personnel, and Lee County Council and Staff.

My first priority is to always listen to Residents and help with their concerns. I have Bachelors and Masters degrees in Education from the University of Illinois and have taught Special Education for 24 years. I have learned to multi-task by teaching self-contained special classes for learning disabilities, behavior disorders, educable mentally handicapped and the physically challenged.

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JAMES E. (JIM) BOLINGER, MBA, CPA

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Fort Myers, FL 33913

james.bolinger@comcast.net
574-274-7658

Expertise:

- Strategic Planning
- Business Planning
- Financial Planning
- Feasibility Analysis
- Business Valuations
- Mergers and Acquisitions

Career Experience:

- Senior Manager, Coopers & Lybrand (International Public Accounting Firm)
- Vice President and Chief Financial Officer, large community hospital
- Partner, National Health Advisors, nation-wide consulting firm focusing on strategy, feasibility studies and mergers/acquisitions
- Managing Partner, Arista Associates, nation-wide consulting firm focusing on strategy, business planning, feasibility studies and mergers/acquisitions
- Owner, Flags International, a small retail and service business

Other entrepreneurial activities:

- Co-founded the Association of Healthcare Internal Auditors
- Co-founded a group purchasing organization in a specialty retail industry

Professional designations (past and current):

- Fellow, American Association of Healthcare Consultants
 - credentialed in Finance and Strategy
- Fellow, Healthcare Financial Management Association
- CPA.

Education:

- MBA with Honors, University Notre Dame
- Bachelor of Science in Business, Indiana University.

Military Service:

- U.S. Army, 1967 – 1970

GARY BRUN

Kathleen and I became residents of Pelican Preserve in 2002 with a purchase of a new home in Sevilla. Actually in 2002 Pelican Preserve was Sun City Center. We have enjoyed living in Pelican Preserve and in 2013 we sold our Minnesota home and became full-year residents with a purchase of a new home in Azzurra. The Brun's have been married for 49 years; have 3 children, and have 6 grandchildren. We have been able to call Colorado, Wisconsin, Minnesota, and now Florida home – that's it!

During the growth of Pelican Preserve, I have been a member of the Alliance and have been impressed with the contributions that so many have made to our community. Our community continues to grow which brings with it new challenges. Much of my interest centers around this continued growth and the increasing demands it places on our amenities specifically the Town Center.

I am a current Director of the Alliance Board of Directors and have previously served as the chair of the Town Center Purchase Committee (TCPC). I am also co-chairman of

grow from year to year. I have also serve on my neighborhood Board of Director both in Sevilla and Azzurra. Kath and I have also had the "opportunity" to be the Sunday Afternoon Lawn Bowling "Commissioners"! Lots of fun.

Education/Experience:

- Bachelors and Master Degree in Engineering – University of Wisconsin
- Aerospace Engineer – Martin Marietta
- IBM: 31+ Years
 - Sales
 - Product Development .. Management
 - Technical Support .. Management
 - Worldwide Education .. Management

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QUENTIN E. DAVIS

Economic Development Consultancy: 1993 to present:

QED Consulting, Lakeside Park, KY: Principal Consultant. Analysis of complex environments that have included: market assessment and forecasting; economic impact analysis including revenue, expenses, taxes, jobs and indirect impacts; strategic planning; real estate market assessment including mixed-use configurations, alternative use analysis, transportation impact assessment, parking demand analysis; consultation with private developers, city and county governments on development options and strategies: casino market assessment, penetration and rapid market changes. Participated with a number of different project-specific teams with other firms and government agencies.

Economic Development Director: 1980 to 1993:

Progressively more responsible positions: Managed economic development and redevelopment departments; downtown revitalization planning and specific project design; industrial (brown field) redevelopment; project financing and refinancing (bonds, general appropriations, state and federal appropriations, grants, special assessment districts, tax increment/allocation districts, tax abatement, enterprise zones, etc.); liaison and lobbying with county, state and federal legislatures and agencies as well as financial institutions, chambers of commerce, etc.; developer selection and contract negotiations; waterfront strategic planning and project implementation. Projects included strategic planning, retail, office, hotel, entertainment, housing, parking decks, docks, industrial, utility, historic preservation, transportation and adaptive reuse elements.

Previous Positions

- ◆ Director of Economic Development, City of Cincinnati, Ohio 1991-1993.
- ◆ Assistant City Manager for Development, Peoria, Illinois, 1986 to 1991.
- ◆ Executive Director, Department of Metropolitan Development, Evansville, Indiana, 1980-1986.
- ◆ Director of Research, Landmark Consulting Services, Inc., Evansville, Indiana, 1978-1980.
- ◆ Assistant Professor, University of Southern Indiana (formerly Indiana State University - Evansville), 1974-78.
- ◆ Graduate research associate and instructor, Purdue University, West Lafayette, Indiana, 1971 - 1974
- ◆ Instructor, Ball State University, Muncie, Indiana, 1968 - 1971.
- ◆ Instructor, West Liberty State College, West Virginia, 1967 - 1968.

Skills:

Excellent communications skills including written and oral presentations and computer-based analysis; High level of initiative as demonstrated through strategic planning and project implementation; Demonstrated leadership and ability to work with persons from diverse, international and cross-cultural backgrounds including local and international teams; Strong computer (PC) skills, particularly in the area of economic modeling and market assessment;

Local, national and international consulting experience; Strong negotiator with and between developers, private sector interests, non-governmental organizations, federal, state and local governments. Experience in working with historic preservation issues and planning.

Education

- ◆ Bachelor of Arts, Political Science, Purdue University, West Lafayette, Indiana, 1966.
 - ◆ Master of Arts, Political Science, Purdue University, 1967.
 - ◆ Additional graduate work, Political Science, Purdue University, 1971 – 1974
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Presentations

- Presentations to Corporate Boards, City Councils, County Commissions, Chamber of Commerce committees, School Boards, Neighborhood Councils, etc. regarding specific development projects, issues, cooperative agreements, etc.
 - Presentations, panel organization and conference development for state, regional and national organizations, including: CUED (National Council on Urban Economic Development), ICMA (International City/County Managers Association), and the Urban Land Institute District Council, NAHRO (National Association of Housing and Redevelopment Officials, ASPA (American Society for Public Administration). Over 50 presentations in all.
 - Testimony before General Assembly Committees in Indiana, Illinois and Ohio related to economic development issues, finance and planning.
 - Testimony before the US House of Representative Ways and Means Committee regarding historic preservation issues.
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Projects and Assignments (frequently as part of multi-disciplinary teams)

- Innumerable projects as the chief development officer for three cities involving downtown, waterfront, industrial, commercial, housing and parking projects.
- Projects in over twenty states and fourteen countries, reflecting the ability to adapt to specific legal systems, cultures and social issues in a wide variety of development issues and circumstances.
- Over one hundred assessments, studies and strategic plans from 1993 to present

Recent Projects:

- ◆ Tribune Building Planning, Incourage Community Foundation, Wisconsin Rapids, WI 2019
- ◆ Forest County Potawatomi Business Park Feasibility Assessment, I, 2018
- ◆ Bulk Services On-Line Surveys I & II Pelican Preserve, FL 2018
- ◆ Traffic & Safety On-line Survey, Pelican Preserve, FL 2018
- ◆ Grayling Community Center Assessment – Grayling/Crawford County, MI 2018
- ◆ Saginaw Economic Development Strategy, Saginaw, MI 2018
- ◆ Town Center Amenities Survey, Pelican Preserve, FL 2018
- ◆ Forest County Potawatomi Community Business Park Plan – Forest County, WI, 2018
- ◆ Pelican Preserve Residents Alliance – Online Survey and analysis (N>2230) on amenities

preferences. 2017

- ◆ Good Shepard UMC, North Fort Myers, FL – 2017– demographics and positioning research.
- ◆ Site reuse assessment – two downtown blocks – 1st UMC Site, Fort Myers, FL 2016-2017
- ◆ Lacroix Church, Cape Girardeau, MO – demographics research and assistance - 2017
- ◆ Northeast District, FL UMC demographics research. 2016
- ◆ Meydan One Mixed Use/Retail Project – Dubai UAE – 2016. A \$US 3.5 billion project center on a 3.5 mill s.f. mall and entertainment center.
- ◆ Regional Economic Growth Initiative Competitive Assessment Inventory – Southern Wood and Northern Adams Counties, Wisconsin June 2015
- ◆ Coral Gables, FL Mixed Use Project – revised feasibility assessment - 2015
- ◆ Plymouth 2020 Downtown Action Plan – Plymouth Wisconsin May 2015
- ◆ Economic Development Asset Inventory of Houghton and Baraga Counties on Behalf of Aanikoosing, Inc. – Upper Peninsula, Michigan, December 2014
- ◆ Coral Gables Mixed Use Project feasibility assessment – Coral Gables FL 2012; updated 2015
- ◆ Central Market Project, Abu Dhabi, UAE 2011 – retail and entertainment realignment in a \$2.4 billion mixed use project.

Community Involvement

- ◆ In Evansville, IN – member of twelve boards and commissions, 1976-1986
- ◆ In Peoria, IL – member of fifteen boards and commissions, 1986-1991
- ◆ In Cincinnati, OH – member of six boards and commissions, 1991 – 2000
- ◆ Currently:
 - President, Viadana Condominium Association, 2018-2020
 - Viadana Condominium Association Board member, 2013-present
 - Town Center Purchase Committee, 2013-2018
 - Pelican Preserve Transition Committee, 2018-present
 - Southwest Florida District Operations Team (Methodist Church), 2013-present
 - First United Methodist Church, Fort Myers, Property Disposition Team, 2017-present

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Nancy Francis

Like most people my age I've had several reinventions of my career. I believe the one in real estate is pertinent to Town Center Purchase Committee.

My career spanned over 20 years in the Real Estate Industry; first as a Realtor and then as VP of Marketing for several Maryland Title Companies. In 1997 I opened my own Title Company in Maryland. The Company employed 15 full time personnel. We closed approximately 2500-3000 transactions per year. These were primarily residential transactions with some commercial closings. I sold my shares to two partners and retired in 2003.

I was a snowbird in Ft Myers until 2016 when I moved full time to Pelican Preserve with my husband Geary.

Therefore, I have a better than average, for a non-attorney, understanding of contracts, types of Deeds, lending practices, fiduciary responsibilities and of course personnel management. I am someone who listens, considers the information, and makes an informed judgment.

I attended Villa Julie College and Harford Community College in Maryland

I have participated in several HOA's in Maryland.

Other Volunteer activities:

- I am currently serving on The Mayor's Affordable Housing Advisory Board, City of Ft Myers
- I am also a volunteer with the Harry Chapin Food Bank

As an aside: Since retiring, I have been performing stand-up comedy. Sometimes you just have to laugh!

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Dave Matthews

Dave is an experienced senior leader in developing strategies and tactics to achieve business objectives, consistently delivering sustainable solutions within time and budget constraints. He has a record of accomplishment across aerospace and IT services industries. His contributions have ranged from individual contributor to corporate executive leadership to business owner. He has performed in a wide range of roles; prime contractor, subcontractor, employee and consultant, consistently leading teams to deliver results for the US and international military and government agencies, as well as for commercial customers.

Following his retirement in 2015, Dave has remained active in the Pelican Preserve Community, serving on the board of the Residents' Alliance for a Quality Lifestyle, a non-profit organization supporting the residents of Pelican Preserve; most recently serving as the Vice President and Chairperson for the Town Center Purchase Committee and a member of the Negotiations Subcommittee.

Dave graduated with a BS Electrical Engineering/Electronics from the University of Pittsburgh in 1975. He has successfully completed numerous technical and business courses throughout his career.

His most recent work experiences are summarized below:

- **Vice President - Residents' Alliance for a Quality Lifestyle**, Fort Myers, FL 2017 – Present
- **Managing Partner GCC Associates**, Vienna, VA 2012 – Aug 2015
GCC Associates is the consulting and advisory division of the company, providing business development, executive-level leadership consulting, government relations, strategic partnering and training to defense and technology companies worldwide.
- **Senior Vice Pres., Quality & Technical Operations, SRA International**, Fairfax, VA 2008-2012
Lead a team of professionals in providing improved corporate wide capabilities for technical execution, quality assurance, new business development and capture, business processes and project management for IT and Cybersecurity services for US government and state agencies
- **Vice President - Sensis Corporation**, Syracuse, NY 2003-2008
Corporate and programmatic leadership for product design and development focusing on FAA and US Marine Corps Radar and Surface movement control products.

[Learn more about Dave on LinkedIn.](#)

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Rich Rittenberg

Born/Raised—Paterson, NJ

Educational Background:

- AB —Bucknell University, Lewisburg, PA—Major in Economics
- LLB—Stanford University School of Law, Stanford, CA
- Admitted to California State Bar

Employment Highlights

US Air Force

- Officer Training School
- Procurement Officer—2 years
- Trial Attorney trying Government Contract disputes before Armed Services Board of Contract Appeals—2 years

General Electric Company—21 years

- Served in Legal Department of 5 different operating businesses
- Last Position—General Counsel, GE Motors (a \$1 Billion business)
- Responsible for all legal issues of business, including compliance litigation and international transactions

Martin Marietta Corporation / Lockheed Martin Corporation-combined 8 years

- Vice President & General Counsel—Naval Systems (a \$1 Billion + business)
- Responsible for all legal issues of business including compliance, litigation, and international transactions

Moved to Pelican Preserve in Jan 2004

- Portofino Resident
- Residents' Alliance Board of Directors-10 years
- Town Center Committee-post Alliance Board service
- Currently serving as the Resident Director—Master Association and Chair-Master Turnover Committee
- Member-PP Golf Course
- Member-United Way Committee

Married—wife is Gloria—49+ years

2 children, 2 grandchildren

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Philip Rovner

Mr. Rovner is a goal-oriented leader with his sights set at the organizational and community level. He is a strategic thinker, planner and hands-on manager and executive with broad experience across multiple organizations

Currently retired since 2014, he is very active in the Pelican Preserve community; fulfilling a variety of leadership roles, such as the President of the Carena Home Owners Association. He is also key member of the Residents' Alliance for a Quality Lifestyle, Town Center Purchase Committee, Negotiation subcommittee where he provides his accounting and leadership skills to the benefit of the team.

Prior to his retirement, Philip held multiple ownership and leadership roles, recent positions are summarized below:

- Principal at Rovner Philanthropic Partnerships, Norfolk, Virginia Area, Jul 2014 – Present

Partnering with nonprofit leadership and professional staff to envision and execute strategies to achieve meaningful mission-based objectives and goals.

- President & CEO at Tidewater Jewish Foundation, Norfolk/VA Beach, Mar 1996 – Jun 2014 VA Retired June 2014

Primary responsibility was Chief Development Officer for current and planned gifts, Was also responsible for all of the typical duties associated with being the CEO to include management responsibilities for fiscal, investment policy oversight and execution, administration and donor services. The Foundation had grown from \$22 million to \$106 million during my tenure inclusive of making charitable distributions of \$5-11 million/year and maintaining an operational budget within the metrics associated for a community foundation of this size. •

Philip earned his BS in Accounting from University of South Carolina in 1967 and his CPA certification in 1972 from the American Institute of Certified Public Accountants

[Learn more about Philip on LinkedIn](#)

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STEVEN R. LUBINSKI

- Graduated University, BA in Economics and Statistics

Professional work experience:

- Research Director at Federated Department Stores, Cincinnati Ohio
- Recruited by John Wanamaker (Philadelphia) as Divisional Vice President Research & Planning
- Executive Vice President Finance/Administration, Secretary Treasurer, Associated Merchandising Corporation, New York
- President/Chief Operating Officer, ESCADA USA, subsidiary Of ESCADA AG ,Designer fashion apparel company, Munich, Germany
- Formed CLOSEOUTNOW.com and was Chairman and CEO
- Consultant to a number of US and INTERNATIONAL DESIGNER fashion apparel companies

In Retirement, I am engaged in the following:

- Treasurer and Board Member of the Pelican Preserve Resident's Alliance
- Volunteer, Gulf Coast Medical Center (Lee MEMORIAL) as Patient Advocate in Emergency
- Volunteer, Treeline Elementary school as Tutor in 4th grade mathematics
- Participate in program titled BLESSING IN A BACKPACK providing weekend meals to children in Title 1 schools
- Volunteer, St. Mary Medical Center, Langhorne PA Information Officer

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