



**MONTEREY CONGRESS  
COMMUNITY DEVELOPMENT  
DISTRICT**

**PALM BEACH COUNTY  
REGULAR BOARD MEETING  
MARCH 3, 2026  
6:00 P.M.**

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

[www.montereycongresscdd.org](http://www.montereycongresscdd.org)

561.630.4922 Telephone  
877.SDS.4922 Toll Free  
561.630.4923 Facsimile

**AGENDA**  
**MONTEREY CONGRESS**  
**COMMUNITY DEVELOPMENT DISTRICT**  
100 Lake Monterey Circle  
Boynton Beach, Florida 33426  
**REGULAR BOARD MEETING**  
**March 3, 2026**  
**6:00 p.m.**

- A. Call to Order
- B. Proof of Publication.....Page 1
- C. Establish Quorum
- D. Additions or Deletions to Agenda
- E. Comments from the Public for Items Not on the Agenda
- F. Approval of Minutes
  - 1. October 7, 2025 Regular Board Meeting Minutes.....Page 2
- G. Old Business
- H. New Business
  - 1. Consider Resolution No. 2026-01 – Adopting a Fiscal Year 2026/2027 Proposed Budget.....Page 5
  - 2. Consider Approval of Attorneys Fee Adjustment – Billing Cochran.....Page 12
- I. Administrative Matters
- J. Board Members Comments
- K. Adjourn

# LOCALiQ

The Gainesville Sun | The Ledger  
Daily Commercial | Ocala StarBanner  
News Chief | Herald-Tribune  
News Herald | The Palm Beach Post  
Northwest Florida Daily News

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## AFFIDAVIT OF PUBLICATION

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STE A

PALM BEACH GARDENS FL 334105207

STATE OF WISCONSIN, COUNTY OF BROWN

Before the undersigned authority personally appeared, who on oath says that he or she is the Legal Coordinator of the Palm Beach Post, published in Palm Beach County, Florida; that the attached copy of advertisement, being a Public Notices, was published on the publicly accessible website of Palm Beach County, Florida, or in a newspaper by print in the issues of, on:

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Affiant further says that the website or newspaper complies with all legal requirements for publication in chapter 50, Florida Statutes.

Subscribed and sworn to before me, by the legal clerk, who is personally known to me, on 09/23/2025

*Nicole Jacobs*

Legal Clerk

*Kongmeng Yang*

Notary, State of WI, County of Brown

9-3-29

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MONTEREY/CONGRESS  
COMMUNITY DEVELOPMENT  
DISTRICT  
FISCAL YEAR 2025/2026 REGULAR  
MEETING SCHEDULE  
NOTICE IS HEREBY GIVEN that the Board of Supervisors of the Monterey/Congress Community Development District will hold meetings at 100 Lake Monterey Circle, Boynton Beach, Florida 33426 at 6:00 p.m. on the following dates:  
October 7, 2025  
November 4, 2025  
December 2, 2025  
January 6, 2026  
February 3, 2026  
March 3, 2026  
April 7, 2026  
May 5, 2026  
June 2, 2026  
July 7, 2026  
August 4, 2026  
September 1, 2026

The purpose of the meetings is to conduct any and all business coming before the Board. Meetings are open to the public and will be conducted in accordance with the provisions of Florida law. Copies of the Agendas for any of the meetings may be obtained from the District's website or by contacting the District Manager at (561) 630-4922 and/or toll free at 1-877-737-4922 prior to the date of the particular meeting.

From time to time one or more Supervisors may participate by telephone; therefore a speaker telephone will be present at the meeting location so that Supervisors may be fully informed of the discussions taking place. Meeting may be continued as found necessary to a time and place specified on the record.

If any person decides to appeal any decision made with respect to any matter considered at these meetings, such person will need a record of the proceedings and such person may need to ensure that a verbatim record of the proceedings is made at his or her own expense and which record includes the testimony and evidence on which the appeal is based.

In accordance with the provisions of the Americans with Disabilities Act, any person requiring special accommodations or an interpreter to participate at any of these meetings should contact the District Manager at (561) 630-4922 and/or toll-free at 1-877-737-4922 at least seven (7) days prior to the date of the particular meeting. Meetings may be cancelled from time to time without advertised notice.

MONTEREY/CONGRESS COMMUNITY DEVELOPMENT DISTRICT  
www.montereycongresscdd.org  
Sept 23, 2025 #11671210

**MONTEREY/CONGRESS COMMUNITY DEVELOPMENT DISTRICT  
REGULAR BOARD MEETING  
OCTOBER 7, 2025**

**A. CALL TO ORDER**

District Manager Jason Pierman called the October 7, 2025, Regular Board Meeting of the Monterey/Congress Community Development District (“District”) to order at 6:10 p.m. at 100 Lake Monterey Circle, Boynton Beach, Florida 33426.

**B. PROOF OF PUBLICATION**

Mr. Pierman presented proof of publication that notice of the Regular Board Meeting had been published in *The Palm Beach Post* on September 23, 2025, as part of the District’s Fiscal Year 2025/2026 Regular Meeting Schedule, as legally required.

**C. ESTABLISH A QUORUM**

Mr. Pierman determined that the attendance of Chairperson Libia Cristancho, Vice Chairman Willie Ford and Supervisors Erick Betances (via phone) and Lissette Montavo constituted a quorum and it was in order to proceed with the meeting.

Staff in attendance were District Manager Jason Pierman of Special District Services, Inc.; and General Counsel Scott Cochran of Billing, Cochran, Lyles, Mauro & Ramsey, P.A.

**D. ADDITIONS OR DELETIONS TO THE AGENDA**

There were no additions or deletions to the agenda.

**E. COMMENTS FROM THE PUBLIC FOR ITEMS NOT ON THE AGENDA**

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

**F. APPROVAL OF MINUTES**

**1. June 3, 2025, Public Hearing & Regular Board Meeting**

Mr. Pierman presented the minutes of the June 3, 2025, Public Hearing & Regular Board Meeting and asked if there were any changes.

There being no changes, a **motion** was made by Mr. Ford, seconded by Ms. Cristancho and passed unanimously approving the minutes of the June 3, 2025, Public Hearing & Regular Board Meeting, as presented.

**G. OLD BUSINESS**

There were no Old Business items to come before the Board.

**H. NEW BUSINESS**

**1. Consider Resolution No. 2025-05 – Adopting a Fiscal Year 2024/2025 Amended Budget**

Resolution No. 2025-05 was presented, entitled:

**RESOLUTION NO. 2025-05**

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

A **motion** was made by Ms. Montavo, seconded by Mr. Ford and passed unanimously adopting Resolution No. 2025-05, as presented.

**2. Consider Resolution No. 2025-06 – Goals and Objectives Annual Report**

Resolution No. 2025-06 was presented, entitled:

**RESOLUTION NO. 2025-06**

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

A **motion** was made by Mr. Ford, seconded by Ms. Cristancho and passed unanimously adopting Resolution No. 2025-06, as presented.

**3. Discussion Regarding Final Years of Bond Payments**

Discussion ensued regarding the ability to use the fund balance to pay off the bond early. Mr. Pierman explained the process, noting that the bond matures in 2036, so there is still some time until the Board could use the remaining fund balance to pay off the bond.

**I. ADMINISTRATIVE MATTERS**

Mr. Pierman advised that the next meeting would be scheduled for either March or April.

**J. BOARD MEMBER COMMENTS**

There were no further comments from the Board Members.

**K. ADJOURNMENT**

There being no further business to come before the Board, a **motion** was made by Ms. Cristancho, seconded by Mr. Ford and unanimously passed adjourning the Regular Board Meeting at 6:24 p.m.

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Secretary/Assistant Secretary

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Chair/Vice-Chair

**RESOLUTION NO. 2026-01**

**A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE MONTEREY CONGRESS COMMUNITY DEVELOPMENT DISTRICT APPROVING A PROPOSED BUDGET FOR FISCAL YEAR 2026/2027; AND PROVIDING AN EFFECTIVE DATE.**

**WHEREAS**, the Board of Supervisors (“Board”) of the Monterey Congress Community Development District (“District”) is required by Chapter 190.008, *Florida Statutes*, to approve a Proposed Budget for each fiscal year; and,

**WHEREAS**, the Proposed Budget including the Assessments for Fiscal Year 2026/2027 has been prepared and considered by the Board.

**NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE MONTEREY CONGRESS COMMUNITY DEVELOPMENT DISTRICT THAT:**

**Section 1.** The Proposed Budget including the Assessments for Fiscal Year 2026/2027 attached hereto as Exhibit “A” is approved and adopted.

**Section 2.** A Public Hearing is hereby scheduled for July 7, 2026 at 6:00 p.m. at 100 Lake Monterey Circle, Boynton Beach, Florida 33426, for the purpose of receiving public comments on the Proposed Fiscal Year 2026/2027 Budget.

**PASSED, ADOPTED and EFFECTIVE** this 3<sup>rd</sup> day of March, 2026.

**ATTEST:**

**MONTEREY CONGRESS  
COMMUNITY DEVELOPMENT DISTRICT**

By: \_\_\_\_\_  
Secretary/Assistant Secretary

By: \_\_\_\_\_  
Chairman/Vice Chairman

Monterey/Congress  
Community Development District

**Proposed Budget For  
Fiscal Year 2026/2027  
October 1, 2026 - September 30, 2027**

# CONTENTS

- I PROPOSED BUDGET
- II DETAILED PROPOSED BUDGET
- III DETAILED PROPOSED DEBT SERVICE FUND BUDGET
- IV ASSESSMENT COMPARISON

**PROPOSED BUDGET**  
**MONTEREY/CONGRESS COMMUNITY DEVELOPMENT DISTRICT**  
**FISCAL YEAR 2026/2027**  
**OCTOBER 1, 2026 - SEPTEMBER 30, 2027**

	<b>FISCAL YEAR 2026/2027 BUDGET</b>
<b>REVENUES</b>	
O & M Assessments	75,326
Debt Assessments	217,294
Other Revenues	0
Interest Income	1,080
<b>TOTAL REVENUES</b>	<b>\$ 293,700</b>
<b>EXPENDITURES</b>	
Supervisor Fees	6,000
Payroll Taxes (Employer)	480
Engineering/Inspections	2,500
Management	24,456
Secretarial	3,000
Legal	7,000
Assessment Roll	3,000
Audit Fees	3,500
Insurance	7,900
Legal Advertisements	1,200
Miscellaneous	650
Postage	175
Office Supplies	325
Dues & Subscriptions	175
Trustee Fee	4,400
Website Management	2,000
Reserve	5,125
<b>TOTAL EXPENDITURES</b>	<b>\$ 71,886</b>
<b>REVENUES LESS EXPENDITURES</b>	<b>\$ 221,814</b>
Bond Payments	(204,256)
<b>BALANCE</b>	<b>\$ 17,558</b>
County Appraiser & Tax Collector Fee	(5,853)
Discounts For Early Payments	(11,705)
<b>EXCESS/ (SHORTFALL)</b>	<b>\$ -</b>
Carryover From Prior Year	0
<b>NET EXCESS/ (SHORTFALL)</b>	<b>\$ -</b>

**DETAILED PROPOSED BUDGET**  
**MONTEREY/CONGRESS COMMUNITY DEVELOPMENT DISTRICT**  
**FISCAL YEAR 2026/2027**  
**OCTOBER 1, 2026 - SEPTEMBER 30, 2027**

	FISCAL YEAR 2024/2025 ACTUAL	FISCAL YEAR 2025/2026 BUDGET	FISCAL YEAR 2026/2027 BUDGET	COMMENTS
<b>REVENUES</b>				
O & M Assessments	75,571	75,326	75,326	Expenditures Less Interest & Carryover/.94
Debt Assessments	217,361	217,294	217,294	Bond Payments/.94
Other Revenues	0	0	0	
Interest Income	8,307	960	1,080	Interest Projected At \$90 Per Month
<b>TOTAL REVENUES</b>	<b>\$ 301,239</b>	<b>\$ 293,580</b>	<b>\$ 293,700</b>	
<b>EXPENDITURES</b>				
Supervisor Fees	2,200	6,000	6,000	Supervisor Fees
Payroll Taxes (Employer)	168	480	480	Projected At 8% Of Supervisor Fees
Engineering/Inspections	0	2,500	2,500	No Change From 2025/2026 Budget
Management	23,160	23,820	24,456	CPI Adjustment
Secretarial	3,000	3,000	3,000	No Change From 2025/2026 Budget
Legal	7,068	7,000	7,000	No Change From 2025/2026 Budget
Assessment Roll	3,000	3,000	3,000	No Change From 2025/2026 Budget
Audit Fees	3,300	3,400	3,500	Accepted Amount For 2025/2026 Audit
Insurance	6,858	7,400	7,900	Fiscal Year 2025/2026 Expenditure Was \$7,269
Legal Advertisements	628	1,200	1,200	No Change From 2025/2026 Budget
Miscellaneous	386	700	650	\$50 Decrease From 2025/2026 Budget
Postage	30	200	175	\$25 Decrease From 2025/2026 Budget
Office Supplies	255	325	325	No Change From 2025/2026 Budget
Dues & Subscriptions	175	175	175	No Change From 2025/2026 Budget
Trustee Fee	4,246	4,400	4,400	No Change From 2025/2026 Budget
Website Management	2,000	2,000	2,000	No Change From 2025/2026 Budget
Reserve	12,475	6,166	5,125	Reserve
<b>TOTAL EXPENDITURES</b>	<b>\$ 68,949</b>	<b>\$ 71,766</b>	<b>\$ 71,886</b>	
<b>REVENUES LESS EXPENDITURES</b>	<b>\$ 232,290</b>	<b>\$ 221,814</b>	<b>\$ 221,814</b>	
Bond Payments	(207,081)	(204,256)	(204,256)	2027 Principal & Interest Payments
<b>BALANCE</b>	<b>\$ 25,209</b>	<b>\$ 17,558</b>	<b>\$ 17,558</b>	
County Appraiser & Tax Collector Fee	(1,567)	(5,853)	(5,853)	Two Percent Of Total Assessment Roll
Discounts For Early Payments	(11,039)	(11,705)	(11,705)	Four Percent Of Total Assessment Roll
<b>EXCESS/ (SHORTFALL)</b>	<b>\$ 12,603</b>	<b>\$ -</b>	<b>\$ -</b>	
Carryover From Prior Year	0	0	0	Carryover From Prior Years
<b>NET EXCESS/ (SHORTFALL)</b>	<b>\$ 12,603</b>	<b>\$ -</b>	<b>\$ -</b>	

**DETAILED PROPOSED DEBT SERVICE BUDGET**  
**MONTEREY/CONGRESS COMMUNITY DEVELOPMENT DISTRICT**  
**FISCAL YEAR 2026/2027**  
**OCTOBER 1, 2026 - SEPTEMBER 30, 2027**

	FISCAL YEAR 2024/2025	FISCAL YEAR 2025/2026	FISCAL YEAR 2026/2027	
REVENUES	ACTUAL	BUDGET	BUDGET	COMMENTS
Interest Income	6,148	1,000	1,500	Projected Interest For 2026/2027
NAV Tax Collection	207,081	204,256	204,256	Maximum Debt Service Collection
Prepaid Bond Collection	0	0	0	
<b>Total Revenues</b>	<b>\$ 213,229</b>	<b>\$ 205,256</b>	<b>\$ 205,756</b>	
<b>EXPENDITURES</b>				
Principal Payments	161,000	164,000	168,000	Principal Payment Due In 2027
Interest Payments	44,681	39,676	36,256	Interest Payments Due In 2027
Extraordinary Principal Payments	0	1,580	1,500	Estimated Excess Debt Collections
<b>Total Expenditures</b>	<b>\$ 205,681</b>	<b>\$ 205,256</b>	<b>\$ 205,756</b>	
<b>Excess/ (Shortfall)</b>	<b>\$ 7,548</b>	<b>\$ -</b>	<b>\$ -</b>	

**Series 2021 Bond Refunding Information**

Original Par Amount =	\$2,631,000	Annual Principal Payments Due:
Interest Rate =	2.060%	May 1st
Issue Date =	September 2021	Annual Interest Payments Due:
Maturity Date =	May 2036	May 1st & November 1st
Par Amount As Of 1/1/26 =	\$2,008,000	

## Monterey/Congress Community Development District Assessment Comparison

	Fiscal Year 2022/2023 Assessment*	Fiscal Year 2023/2024 Assessment*	Fiscal Year 2024/2025 Assessment*	Fiscal Year 2025/2026 Assessment*	Fiscal Year 2026/2027 Projected Assessment*
O & M	\$ 251.11	\$ 251.11	\$ 251.11	\$ 251.11	\$ 251.11
<u>Debt</u>	<u>\$ 726.74</u>	<u>\$ 726.74</u>	<u>\$ 726.74</u>	<u>\$ 726.74</u>	<u>\$ 726.74</u>
Total	<b>\$ 977.85</b>	<b>\$ 977.85</b>	<b>\$ 977.85</b>	<b>\$ 977.85</b>	<b>\$ 977.85</b>

\* Assessments Include the Following :

- 4% Discount for Early Payments
- 1% County Tax Collector Fee
- 1% County Property Appraiser Fee

Community Information:

Total Units	300
<u>Prepayments</u>	<u>1</u>
Billed for Debt	299

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February 2, 2026

VIA E-MAIL ONLY – [jpierman@sdsinc.org](mailto:jpierman@sdsinc.org)

Mr. Jason Pierman  
District Manager  
Special District Services  
The Oaks Center  
2501A Burns Rd  
Palm Beach Gardens, FL 33410

**Re: Adjustment to District Counsel Fee Structure  
Monterey Congress Community Development District  
Our File: 623.04375**

Dear Jason:

This firm's current fee structure has been in place since 2023. Although we are certainly mindful of the necessity to keep increases in the District's expenses, including the cost of legal services, to a minimum, it has become necessary for us to adjust our hourly rates effective, October 1, 2026, as follows:

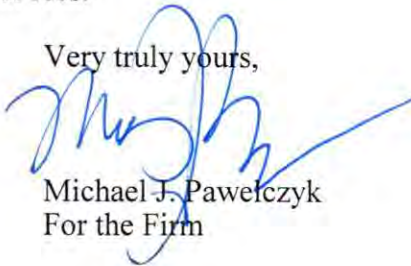
- Attorneys/Partners: \$300.00 per hour
- Attorneys/Associates: \$250.00 per hour

This hourly fee structure will be adjusted on a periodic basis in connection with the District's budget process no later than every third Fiscal Year to reflect changes in the Consumer Price Index published by the U. S. Department of Labor.

Mr. Jason Pierman  
February 2, 2026  
Page 2

Naturally, should you feel you have any questions or require any further information in support of this adjustment you should feel free to contact me at your convenience. As I think you are aware, we very much appreciate the opportunity to serve as District Counsel as well as your courtesy and cooperation with regard to the necessity of what we believe to be both infrequent and reasonable adjustments to our schedule of professional fees.

Very truly yours,

A handwritten signature in blue ink, appearing to read 'Michael J. Pawelczyk', with a long horizontal flourish extending to the right.

Michael J. Pawelczyk  
For the Firm

MJP/jmp

cc: Brielle Barba, SDS (via email only)