



COMPANY PROFILE DECEMBER 2023

*A solutions-based company for today's
ever-changing community management
needs.*

halifax-solutions.com

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About Us

The team at Halifax Solutions has more than 50 years of combined experience in managing Community Development Districts throughout Florida.

Founded in 2020 by longtime community management executive Eric Dailey, Halifax Solutions is a residential focused community development district management company that proudly provides services throughout Florida. We are a solutions-based company for today's ever-changing community management needs.

Halifax Solutions focuses on building lasting client relationships through open and direct communication, trust, and excellent customer service. These relationships we form allow us to better serve these communities with both pride and passion.

To us the true success of a community is based upon a shared vision by the Board of Supervisors that best serves the residents while being fiscally responsible. Halifax Solutions' goal is to work with our Boards to make sure that this vision is carried out to the best of our abilities as your District management provider.



Our Team

Eric Dailey

District Manager, President/CEO



Eric Dailey is the President/CEO of Halifax Solutions. He has been working in community development district management for more than 18 years. A seasoned district management professional, Eric worked at Rizzetta & Company, Inc. for over 15 years. He began in 2004 as a District Manager and moved around the state serving in various roles for the company, including financial consulting, business development and executive management. Eric's most recent position was Director of District Services overseeing a staff of 50 plus team members serving more than 125 districts since 2014.

Eric previously worked for two years with Wachovia Bank as a licensed financial specialist. Prior to joining Wachovia Bank, he worked for five years in sales and operations for Ferguson Enterprises and Hughes Supply.

Eric holds a bachelor's degree from Florida State University and is a Licensed Community Association Manager in Florida. Eric is a graduate of the Leadership Tampa Bay Class of 2017. Other notable positions include serving in the community as a Board Member of the Children's Home Society of Florida Gulf Coast Region from 2017-2020; Vice Chairman 2020, as a Community Ambassador for Super Bowl LV and most recently as a Board Member for the Friends of Joshua House Foundation from 2022-2023.

Eric currently serves on the Board of Directors for Leadership Tampa Bay as Vice Chairman and is also an active member of ULI Tampa Bay. Eric is a Florida native born in Ormond Beach and has resided in the Tampa Bay area for more than 19 years.

Our Team

Pete Williams **District Management Consultant**



Pete Williams serves as a District Management Consultant for Halifax Solutions. Pete has over 35 years of professional community management experience with 24 years related to all aspects of community development districts and various other special taxing districts, located in Florida, Louisiana, and Alabama. His experience includes but is not limited to administration, operation, accounting, financial consulting, assessment allocation, and collection agent. 19 of those years were spent with Rizzetta and Company, Inc. where he served as Vice President.

In addition, Pete has been qualified as an Expert Witness and provided testimony in numerous types of court actions, including bond validation hearings, foreclosure actions, bankruptcy proceedings, civil suits, and various administrative hearings on the local-governmental level. Pete has also been involved either as the manager, assessment consultant or Board Supervisor in over 4.5 Billion dollars in Bond issues.

Prior to his tenure with Rizzetta and Company, Inc., Pete served as Vice President of Majestic Property Management, Inc., where he oversaw the management of that firm's community association clients, which included several luxury waterfront condominium associations.

Before venturing into community management, Pete served as a C-level retailing executive with Jewel Food Stores (Turnstyle Family Center Division), Forest City Enterprises (home improvement center division), The Southland Corporation (7-Eleven Store division) and Rite-Aid Drugs (Circus World Toy Store division).

Pete is also a proud Veteran of the United States Marine Corps, where he had attained the rank of Sergeant (E-5) during his years of service.

Our Team

John McKay **District Financial Services**



John McKay provides District Financial Services for Halifax Solutions. These services include assessment methodology report, annual assessment roll, and direct-bill preparation, lien book maintenance, true-up calculations, and quarterly and annual continuing disclosure reporting. John also provides a wide range of district advisory services to developers, special districts, and others in the real estate development community including cash flow projections, district feasibility studies, and financial modeling for both master-planned residential and commercial developers. John has been qualified as an expert witness in bond validation hearings and has appeared before local governing boards in public hearings for community development district establishment.

John has nearly 40 years of experience in the banking, financial consulting, and real estate development industries. He spent over 20 years with Rizzetta & Company, Inc. providing financial services to the firm's community development district clients throughout the State of Florida and financial, development and asset management services to the firm's affiliated development company.

While at Rizzetta & Company, John developed Special Assessment Allocation Methodology Reports for nearly 100 new money and refunding community development district bond issues and prepared and maintained annual assessment rolls and collection agent records for over 70 districts. John was most recently employed by Neal Land & Neighborhoods, a major master-planned residential developer in Sarasota, Florida, as Director of Community Development Districts and oversaw the company's special district activity.

John has previously held positions as senior associate in the litigation consulting services practice of a national and a regional CPA firm, project manager for a residential real estate developer and marketing officer for a major Florida commercial bank. John has bachelor's degrees in finance from Auburn University and in accounting from the University of South Florida. He is an active member of ULI Tampa Bay.

Our Team



Derek Johnson **Partner, Warren Averett**

Derek Johnson joined Warren Averett CPAs in 2014 to begin their accounting recruiting division before becoming a Partner in 2017. Now, Derek is instrumental in building lasting relationships between Warren Averett CPAs and businesses in need of accounting solutions including audits, reviews, compilations, and tax planning and preparation.

Education: Bachelor of Science in Accounting University of South Florida and Bachelor of Science in Chemistry, Troy University.



Sue Lange, CPA **Principal, Warren Averett**

Sue Lange joined Warren Averett in 2009 and is a Principal in the Firm's Business Services Division. She has more than 18 years of public accounting experience, including her time as a Controller for Advantica, Inc. Sue's primary responsibilities include managing outsourced accounting staff, providing controllership services for business clients and consulting on accounting procedures and implementations.

Education: Bachelor of Science in Accounting Alvernia University, Reading, PA

Services Provided

Halifax Solutions provides the following services required to establish and manage your community development district.

- **District Establishment:** We will assist in the creation of the petition required to file for establishment providing District Counsel with the Statement of Estimated Regulatory Costs (SERC). Our team will attend all meetings and hearings required for the establishment process.
- **District Management:** The District manager shall have charge and supervision of the works of the District and shall be responsible for preserving and maintaining any improvement or facility constructed or erected pursuant to the provisions of Chapter 190 Florida Statutes, for maintaining and operating the equipment owned by the District, and for performing such other duties as may be prescribed by the Board. Some of these additional duties include but are not limited to administrative, accounting, and revenue collection services.
- **Accounting & Assessment Services:** We support your District by performing the most critical accounting and assessment services functions, including financial statement preparation, accounts payable, accounts receivable, monthly general ledgers, and annual assessment roll preparation. We use both Sage Intacct and QuickBooks cloud-based accounting software. In addition, we also use BILL accounts payable automation software to reduce manual entry and speed up the payment process. BILL also offers a more secure way to issue payments and reduce fraud activity.
- **Website Management & Compliance Services:** Our team is responsible for ensuring the District's website is up to date with the proper information and documents while maintaining compliance with Chapter 189.069, Florida Statutes.
- **Dissemination Agent:** We will serve as dissemination agent for the District and undertake the obligations as set forth in the continuing disclosure agreement and U.S. Securities and Exchange Commission Rule 15c-12.



Services Provided

- **Bond Issuance:** We will draft the bond validation and special assessment allocation methodology reports as needed for the issuance of new money or refunding bonds to finance public infrastructure for capital improvement projects of the District.
- **Community Inspections:** Upon request by the Board, we will conduct inspections of the District to review any outstanding or new issues that need to be addressed. Community inspections may require an additional fee based on the desired scope of service.
- **Weekly District Manager Reports:** At Halifax Solutions we pride ourselves on making sure our Boards are made aware of what is going on in their District between meetings. To help communicate this information under the Florida Sunshine Laws we provide each Board with a weekly District Manager Report sent out via email.
- **Intergovernmental Investment Pool Access:** It is important for Districts to make sure they are properly investing their funds in accordance with Florida law. One option we work with our District's on is the Florida Cooperative Liquid Assets Securities System (FLCLASS) which is an intergovernmental investment pool authorized under Section 218.415, Florida Statutes and was created via an interlocal agreement by and among state public agencies as described in Section 163.01, Florida Statutes. FLCLASS provides Florida governmental entities with a convenient method for investing in high-quality, short to medium term securities carefully selected to optimize interest earnings while maximizing safety and liquidity.

Introduced in 2015 as an option for your everyday funds, the FLCLASS fund is a stable \$1.00 NAV local government investment pool that offers daily liquidity. The fund is managed to a stable net asset value (NAV) which means you put a dollar in, and you get a dollar out plus interest.



Services Provided

- **District Records Storage and Sharing:** We store all District records through Citrix ShareFile. This allows Supervisors and authorized staff to always have direct access to the records. Please note that certain records are protected from public access under Florida law.

A secure document portal eliminates the need for email attachments, with a single place to access content in a cloud environment. With ShareFile, documents stay safe in their original location, accessible via secure link whenever and wherever they're needed, from any device.

Data at rest is protected using AES 256-bit encryption with unique per-file keys. Customizable view and download settings let you control who can access what, with complete workflow audit trails to simplify compliance. Data Loss Prevention (DLP) integration integrates ShareFile into your security stack.



At Halifax Solutions, we understand that not all clients have the same needs and therefore we are prepared to tailor our services to meet their specific requests.

What Are They Saying?

“As Chairman of the Spring Lake CDD, I have been consistently impressed with Eric’s dedication, expertise, and abilities. His thorough and timely communication has made it easier for our board to make decisions. His ability to efficiently oversee various aspects of the CDD, including financial management, community projects, administrative tasks and the handling of resident issues has greatly improved the district’s operations. Eric is a professional who consistently goes above and beyond to ensure the well-being and prosperity of the community.”

– **Warren Keipper, Chairman, Spring Lake CDD**



“As a supervisor and Chairman of Fishhawk Ranch CDD, I have found Eric to be an invaluable asset to our community. He combines his considerable knowledge, skill, and experience with his unassuming nature to allow him to work very effectively with residents, staff, board members and community partners alike. He proactively works with the team to find ways to operate the district more efficiently, helping us save our residents tens of thousands of dollars each year. I have never once regretted the decision to work with Eric and his team.”

– **Robert Kneusel, Chairman, Fishhawk Ranch CDD**



What Are They Saying?

“As a Community Development District Board Supervisor in Fishhawk Ranch, it has been my pleasure to have worked with Mr. Dailey for more than 12 years and that relationship continues today. He is exceptionally knowledgeable in all aspects of Community Development District management and his responsiveness to board members, residents, and business partners is unparalleled in the industry”.

– **Terrie Morrison, Board Supervisor, Fishhawk Ranch CDD**



“From day one of working with Mr. Dailey, I knew that I was working with a next level business professional that is second to none in the District management business. His responsiveness, attention to detail, management mastery, and genuine sense of care and understanding of the boards and residents’ needs are just a few of the instantly apparent qualities he possesses. He’s clearly on track to redefining the industry standard and expectations for district management services.”

– **Stephen Brletic, P.E., Owner, Brletic, Dvorak, Inc. (BDI)**



References

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HALIFAX
SOLUTIONS

Current Clients

Fishhawk Ranch Community Development District

- Location: Lithia, Florida
- Website: www.fishhawkkranchcdd.org
- District Manager since August 1, 2020
- Total Units: 5026
- Budget Fiscal Year 2023-2024: \$6,053,627.69
- Chairman: Bob Kneusel
Phone: (813) 662-0032
Email: rkneusel@fishhawkkranchcdd.org

Spring Lake Community Development District

- Location: Riverview, Florida
- Website: www.springlakecdd.org
- District Manager since May 1, 2022
- Total Units: 964
- Budget Fiscal Year 2023-2024: \$2,131,762.69
- Chairman: Warren C. Keipper
Phone: (505) 400-6000
Email: seat5@springlakecdd.org

