



Charlotte HOME
(Housing Opportunities Made Easier)
Application for Affordable Designation/Incentives/Subsidies

Office Use Only:

Application Date: _____

Scoping Meeting Date (if applicable): _____

Rev. 02.11.2025

☒ Rental

☐ Home Ownership

☐ Special Needs/Supported Living

☒ Multi-family

☐ * Subsidized Single Family

☐ Other

An officer, owner, partner, or sole proprietor of the Company applying must sign this form

Applicant/Developer Name: _____ Sovereign at Harbor West, LLC

Telephone Number: 239.691.5559 **Email:** mmiller@national-development.com

Project/Development Name (if applicable): _____ Sovereign at Harbor West

Project/Development Address: _____ 145 and 155 Parade Circle, Rotonda West, FL 33947

Parcel ID Number(s): _____ 412024153001 _____ 412024153002

Property Acreage: 3.226 acres MOL

Zoning District (current): OMI
(Include overlay districts if applicable)

Future Land Use (current): _____ Commercial
(Include overlay districts if applicable)

Zoning District (proposed): OMI

Future Land Use (proposed): _____ Commercial

No. of proposed buildings 1 No. of proposed units 32 No. of Affordable units 32

Percentage of units *Affordable 100% *Average resident income: ☐ 60-80% AMI ☒ <60% AMI ☐ <30% AMI

Homeownership: proposed sales price: _____ Rental: proposed rent range: \$670 - 1,150

☐ Property is subject to FFRMS

***Term of Affordability:** ☐ Perpetuity ☒ 50 years ☐ 21-49 years ☐ 20 years ☐ *Tied to sale of unit

Application in conjunction with a Florida Housing Finance Corporation RFA or Tax Credit Project? ☒ Yes ☐ No

RFA# 2022-206 RFA Application Due Date: funds awarded Local Government contribution required? ☐ Yes ☒ No

Incentives/Fee Subsidies/Funding Requested:

☒ Expedited Permitting ☒ Impact Fee Waiver ☐ Land Donation ☐ *LGAO Local Government Contribution

☐ Utility Connection Fees ☐ Environmental Fees ☐ Permitting Fees ☐ DRI Fees ☒ SHIP/HHR Funding

See page 2 for additional required information.

Incentives may be awarded, subject to available funding, on a pro rata basis for proposals meeting minimum, median or maximum incentive thresholds. Awards are based on AHAC and/or staff recommendation and Board of County Commissioner approval.

Signature: _____ Date: _____

*See attached definitions

Describe the scope of the project including financial capacity, the plan for continued affordability for the term proposed and the plan for annual certification of average resident income, if applicable:

Sovereign Harbor West ("SAHW"), is a proposed 32-unit, 100% affordable multi-family development, consisting of 1 and 2 bedroom garden style apartments, targeting family households at or below 60% of Charlotte County AMI. Applicant is applying to FHFC for funding under RFA 2022-206, HOME Financing to be Used for Rental Developments in Certain Hurricane Ian Impacted Counties, requesting HOME, tax credit, and bond financing. SAHW's owner/principals will demonstrate personal financial capacity to FHFC through its credit underwriting process. SAHW will remain affordable for 50 Years as will be documented by a LURA. Annual income certification of residents, as required by FHFC, will also be conducted for Charlotte County Housing Services by the proposed development's certified Property Manager.

Identify prior work including both successful and unsuccessful projects. How many units have you produced?:

National Development of America has developed over 5,000 units over the past 40 years. We have completed 14 successful projects, for a total of 627 units, with Florida Housing over the past 15 years. See attached for a project list of the NDA/FHFC projects.

Describe any past or present litigation involving any partners in the project, including outcome(s), if applicable:

N/A

Outline project readiness (site control; zoning; construction timeline):

Site control is in place via the vacant land contract entered into by 7/31/25. Charlotte County has provided preliminary site plan approval in the attached forms. We anticipate construction loan closing to occur Quarter 3 of 2026. Construction is estimated to take 15 months to complete.

Identify any leveraged investments and/or collaborative ventures:

Development to be funded through FHFC HOME (Hurricane Ian relief), FHFC Corp. Issued MMRB, 4% Tax Credit/Equity, and conventional debt.

Services and programs offered to residents, if applicable (case management; educational programs; etc.):

Services to be offered to residents include, but may not be limited to Adult Literacy, After School Children's Program and Financial Management Program. These and any other such programs will be conducted by qualified counselors in their respective fields, and will be offered to residents at no cost to them.

Proximity to medical, employment, shopping:

The development site is located approx. 5 miles to grocery (Publix) and other shopping, services, and restaurants. Medical and Walk-In Medical Centers are approx. 4.5 to 5 miles, with the closest hospital 8 miles, from the site. Government centers are within 5 and 13 miles, depending on department. Employment agencies are within 4 to 5 miles.

Multi-Family Project Budget (include sources, uses, rent plan, etc.; attach pro forma)

See attached for sources and uses for this project.

No	Project Name	City	State	Funding Source	Project Type	Building Type	# of Units	Development Cost	Completion Date/Status	Developer	HFA
1	Arcadia Landings	Arcadia	FL	9% LIHTC	Affordable	Multifamily	56	\$ 16,750,000	2024	National Development of America, Inc.	FHFC
2	St Peter Claver - Phase 1	Fort Myers	FL	SAIL/4% LIHTC	Affordable	Multifamily	136	\$ 41,000,000	2024	National Development of America, Inc.	FHFC
3	Casa San Alfonso	Zolfo Springs	FL	HOME	Affordable	Single family	21	\$ 8,080,739	2024	National Development of America, Inc.	FHFC
4	Meadow Park	Arcadia	FL	HOME	Affordable	Multifamily	23	\$ 8,000,000	2024	National Development of America, Inc.	FHFC
5	Casa San Juan Bosco I	Arcadia	FL	HOME	Affordable	Single family	53	\$ 9,200,000	2023	National Development of America, Inc.	FHFC
6	Casa San Juan Bosco II	Arcadia	FI	HOME	Affordable	Single family	44	\$ 8,910,000	2022	National Development of America, Inc.	FHFC
7	Casa San Juan Diego	Immokalee	FL	SAIL/4% LIHTC	Affordable	Multifamily	80	\$ 29,160,000	2022	National Development of America, Inc.	FHFC
8	St John Paul Villas 1	Arcadia	FL	HOME	Affordable	Multifamily	64	\$ 7,845,000	2016	National Development of America, Inc.	FHFC
9	St John Paul Villas 2	Arcadia	FL	HOME	Affordable	Multifamily	8	\$ 989,023	2016	National Development of America, Inc.	FHFC
10	Grove at Theater Road	Bowling Green	FL	HOME	Affordable	Multifamily	24	\$ 8,615,943	2012	National Development of America, Inc.	FHFC
11	Hermosa Arcadia	Arcadia	FL	HOME	Affordable	Multifamily	27	\$ 9,850,000	2012	National Development of America, Inc.	FHFC
12	Pueblo Bonito	Bonita Springs	FL	SAIL	Affordable	Multifamily	44	\$ 4,840,000	2012	National Development of America, Inc.	FHFC
13	Wauchula Place	Wauchula	FL	HOME	Affordable	Multifamily	22	\$ 8,800,000	2025	National Development of America, Inc.	FHFC
14	Holy Child Villas	Bowling Green	FL	HOME	Affordable	Single family	25	\$ 8,760,000	2010	National Development of America, Inc.	FHFC

Charlotte HOME Definitions

The following definitions are included with this Application in order to provide clarity to some of the key terms used throughout the Charlotte HOME Program. Please contact County staff at: charlottehome@charlottecountyfl.gov if you have additional questions or require clarification.

Affordable:

1. For purposes of the Charlotte HOME Program, the term “Affordable” or “Affordable Housing” means housing which is deemed affordable to those with income of 80% AMI (Area Median Income) or below as adjusted for household size. Income limit charts are adjusted and released annually by HUD and Florida Housing Finance Corporation. The most recent combined income and rent limit chart adjusted by household size can be found at:
<https://www.charlottecountyfl.gov/core/fileparse.php/451/urlt/ship-and-hhrp-combined-income-and-rent-limits.pdf>

Average Resident Income:

Refers to the average percentage of area median income at which housing units restricted to certain income levels in an affordable housing development are restricted to.

For example, if the rents for five rental units in an affordable housing development were restricted to remain affordable at 30, 60, 80, 80 and 80 percent of AMI (area median income) respectively, the average affordability for those units would be 66 percent of AMI.

Leveraged Investment:

A strategy that employs either a single or multiple outside funding sources, investments, or borrowed capital. A developer may use or “leverage” these sources together to make the development more feasible or to increase the potential return on the investment.

LGAO Local Government Contribution:

LGAO (Local Government Area of Opportunity) is the Florida Housing Finance Corporation (FHFC) annual Request for Application (RFA) for the 9% Low-Income Housing Tax Credit for medium and small counties. Local government contribution in the amount of \$340,000 is required for application. Charlotte County conducts an annual RFA (if eligible) to determine local preference for contribution.

Mixed Income (Market Rate + Affordable):

A multi-family rental development that offers a minimum 10% of units as Affordable, reserved for households with income at or below 80% Area Median Income (AMI), in addition to market rate units. Affordable unit rent limits are within HUD approved range for income category and tenant income is certified annually. May qualify for incentives and subsidies on Affordable units.

Return on Investment:

In scoring Charlotte HOME applications, the term “Return on Investment” shall be understood as a subjective measure of the individual reviewer’s perception of the overall benefit/return to the County and/or the community as a result of the investment in the project.

Subsidized Single-Family Ownership:

Subsidized Single-Family Ownership refers to a single-family home developed by a Not-for-Profit Housing Developer or Community Land Trust (CLT) in which at least two (2) of the following criteria are met:

1. The housing unit has a guaranteed and quantifiable subsidy attached to it that offsets the costs associated with development, thereby enabling the unit to be maintained as affordable to the end user throughout the entire term of the loan or agreement; or
2. Not-for-Profit Developer/CLT holds a ground lease; or
3. Not-for-Profit Developer/CLT is also the primary mortgage holder; or
4. Not-for-Profit Developer/CLT holds a second “shared equity” mortgage preventing the homeowner from “flipping” the property and cashing out, thus ensuring the continued affordability of the home for a specified term.

Subsidy:

1. A grant by a government or organization to a private person or company to assist in any endeavor deemed advantageous to the public.
2. A sum of money granted by the government or a public body to assist an industry or business so that the price of a commodity or service may remain low or competitive.

Term of Affordability:

Refers to the length of time a rental housing unit is restricted by a LURA (Land Use Restriction Agreement) to remain affordable at a certain level.

For all single-family or multi-family rental units developed, there is a minimum 20-year term of affordability to qualify for Tier 2 incentives under the Charlotte HOME Program. Tax Credit projects require 50 years and other state/federally funded programs may require the units to remain affordable in perpetuity.

A Subsidized Single-Family Ownership or Multi-Family Ownership development has a term of affordability that is tied to the sale of each unit.

Tied to the Sale of the Unit:

Refers to the term of affordability where the unit was developed for the purpose of providing a home ownership opportunity to an individual or family that is certified to be eligible for assistance at the time of sale/transfer of ownership.



MEMORANDUM

Date: 11/10/2025

To: Sovereign at Parkside East, LLC

Via email: mmiller@national-development.com

From: Dustin Cuddy, Zoning Technician *Dustin Cuddy*

Subject: Zoning Verification for property located at 145 Parade Circle, Rotunda West, FL identified as Parcel ID Number 412024153001

Zoning Verification

Pursuant to your request, copy attached as Exhibit "A" for a zoning verification letter for the property located at 145 Parade Circle, Rotunda West, FL and identified as parcel ID Number 412024153001, please see my response below:

Future Land Use Map designation: Commercial
Zoning District Designation: Office Medical Institutional (OMI)
Current Use(s): According to the Charlotte County Property Appraiser Website:
The property current use: VACANT COMMERCIAL

Allowed uses and development standards for the zoning district can be found under the Charlotte County Code of Laws and Ordinances, Sec. 3-9-39 located in the Municode library at https://library.municode.com/fl/charlotte_county/codes/code_of_ordinances?nodeId=PTIILADEGRMA_CH3-9ZO_ARTIIDIRE_S3-9-39OFMEINOM

The requested use of the property is for 32 apartment units. Multifamily is a conditional use in the OMI zone based on the conditions found under the Charlotte County Code of Laws and Ordinances, Sec. 3-9-69.

Sec. 3-9-69. – Conditional uses and structures.

- (a) *Purpose and intent.* The purpose of this section is to provide rules and regulations for any uses and structures designated as a "conditional use and structure (C)" on the use table and listed in all zoning districts found in [chapter 3-9](#). These conditions supplement, modify, or further explain rules and regulations found elsewhere in this chapter, and unless specifically stated to the contrary, apply to all zoning districts. Regulations over and above those imposed by other articles/sections of this chapter are necessary for certain uses which, because of their uniqueness or potential for substantial impact on surrounding land uses, warrant minimum standards that cannot be properly addressed in the development regulations set forth in specific districts. The purpose of this section is to set forth the detailed regulations, including but not limited to the bulk, layout, yard size, and lot area that apply to these uses.
- (g) *Residential uses.*
- (12) Single-family and multifamily residential (CT, OMI, RMF-T).



a. Any property that was zoned CT or prior to October 7, 1997, shall have a residential density of fifteen (15) units per acre. Any property that was zoned OMI prior to October 7, 1997, shall have a residential density of ten (10) units per acre. Any property that was zoned RMF-T prior to October 7, 1997, shall have a residential density of six (6) units per acre.

According to the archived maps on file, the property was zoned OMI prior to October 7, 1997, and therefore has a density of ten (10) units per acre. You may use the following formula and by rounding down to the nearest whole number you can find out how many units would be permitted on the property:

$$(\text{total sq ft of property} / \text{sq ft in an acre}) \times 10$$

Preliminary Site Plan Review is required prior to the approval of the included FHFC forms by the Zoning Official. Information on Site Plan Review can be found here [Site Plan Review | Charlotte County, FL](#).

This is a zoning verification letter only and you must comply with all state and federal laws.

Information regarding permitting and code actions can be found at the following site by searching the property address [Accela Citizen Access \(charlottecountyfl.gov\)](#) located at <https://secureapps.charlottecountyfl.gov/citizenaccess/Welcome.aspx>.

The information provided above is the only information the Department provides for a zoning verification; therefore, the majority of your questions or request for documents have intentionally not been answered or provided as they are outside the scope of a zoning verification letter, and you may not assume any omissions are intended as confirmation to the majority of your questions.

Should you disagree with the information contained herein, you may appeal it within 30 days to the Board of Zoning Appeals (BZA) pursuant to Code Sec. Sec. 3-9-6.1. Administrative appeals.

https://library.municode.com/fl/charlotte_county/codes/code_of_ordinances?nodeId=PTIILADEGRMA_CH3-9ZO_ARTIINGE_S3-9-6.1ADAP

Application. An appeal to the BZA following a denial from the zoning official shall be in writing on forms provided by the community development department and shall be filed with the community development department within thirty (30) calendar days after the date on the decision letter notifying the applicant of the administrative decision or determination by the zoning official. The appeal shall be submitted with the applicable fee, accompanied by all documents, plans and other papers constituting the record, and specify the grounds for the appeal.

Should you have any further questions, please do not hesitate to contact us.



“EXHIBIT A”



Date of Application: 10/22/25

Permit Application #: 202510 34789

☐ Zoning Verification Request
Per Charlotte County LDR's

☐ Zoning Determination Request
Official determination from the Zoning Official

Zoning Letter Request (\$35 fee)

Name of Applicant: Strategic TC Holdings II, LLC

Applicant Email: mmiller@national-development.com

Applicant Phone #: 239-691-5559

Address of Property: 145 Parade Circle, Rotunda West, FL 33947

Parcel ID #: 412024153001

Brief description of intended uses:

The intended use is for 32 apartment units. Parcels 145 and 155
Parade Circle will be used for the project to create the 32 units of
density.

Community Development
Zoning | Current Planning

18400 Murdock Circle | Port Charlotte, FL 33948-1068
Phone: 941.743.1964 | Fax: 941.743.1598



MEMORANDUM

Date: 11/10/2025

To: Sovereign at Parkside East, LLC

Via email: mmiller@national-development.com

From: Dustin Cuddy, Zoning Technician *Dustin Cuddy*

Subject: Zoning Verification for property located at 155 Parade Circle, Rotunda West, FL identified as Parcel ID Number 412024153002

Zoning Verification

Pursuant to your request, copy attached as Exhibit "A" for a zoning verification letter for the property located at 155 Parade Circle, Rotunda West, FL and identified as parcel ID Number 412024153002, please see my response below:

Future Land Use Map designation: Commercial
Zoning District Designation: Office Medical Institutional (OMI)
Current Use(s): According to the Charlotte County Property Appraiser Website:
The property current use: VACANT COMMERCIAL

Allowed uses and development standards for the zoning district can be found under the Charlotte County Code of Laws and Ordinances, Sec. 3-9-39 located in the Municode library at https://library.municode.com/fl/charlotte_county/codes/code_of_ordinances?nodeId=PTIILADEGRMA_CH3-9ZO_ARTIIDIRE_S3-9-39OFMEINOM

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According to the archived maps on file, the property was zoned OMI prior to October 7, 1997, and therefore has a density of ten (10) units per acre. You may use the following formula and by rounding down to the nearest whole number you can find out how many units would be permitted on the property:

$$(\text{total sq ft of property} / \text{sq ft in an acre}) \times 10$$

Preliminary Site Plan Review is required prior to the approval of the included FHFC forms by the Zoning Official. Information on Site Plan Review can be found here [Site Plan Review | Charlotte County, FL](#).

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Should you disagree with the information contained herein, you may appeal it within 30 days to the Board of Zoning Appeals (BZA) pursuant to Code Sec. Sec. 3-9-6.1. Administrative appeals.

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Application. An appeal to the BZA following a denial from the zoning official shall be in writing on forms provided by the community development department and shall be filed with the community development department within thirty (30) calendar days after the date on the decision letter notifying the applicant of the administrative decision or determination by the zoning official. The appeal shall be submitted with the applicable fee, accompanied by all documents, plans and other papers constituting the record, and specify the grounds for the appeal.

Should you have any further questions, please do not hesitate to contact us.



“EXHIBIT A”



Date of Application: 10/22/25 Permit Application #: 20251034788

☐ Zoning Verification Request
Per Charlotte County LDR's

☐ Zoning Determination Request
Official determination from the Zoning Official

Zoning Letter Request (\$35 fee)

Name of Applicant: Strategic TC Holdings II, LLC

Applicant Email: mmiller@national-development.com

Applicant Phone #: 239-691-5559

Address of Property: 155 Parade Circle, Rotunda West, FL 33947

Parcel ID #: 412024153002

Brief description of intended uses:

The intended use is for 32 apartment units. Parcels 145 and 155
Parade Circle will be used for the project to create the 32 units of
density.

Community Development
Zoning | Current Planning

18400 Murdock Circle | Port Charlotte, FL 33948-1068
Phone: 941.743.1964 | Fax: 941.743.1598



Date December 19, 2025

Atwell LLC
Attn: Heather Polito
4161 Tamiami Trail, Bldg. 5, Unit 501
Port Charlotte, FL. 33952

Re: DRC-25-207 Harbor West – Preliminary
Date December 18, 2025

County staff has reviewed the Preliminary Site Plan for Harbor West. The project consists of a 32 unit affordable housing multi-family development. This project site is 3.22± acres and is located at 145 & 155 Parade Cir. Rotonda West, FL.

It is the decision of the Zoning Official to approve DRC-25-207. The comments are as follows:

1. Prior to or at the time of building permit application, provide a completed Tree Permit Application as appropriate for this site, along with a tree inventory (survey) of location, types, sizes of trees overlaid on a site plan of the building, parking, and other site amenities. Identify the trees proposed to be removed and preserved. All trees to be preserved or removed must be in accordance with Section 3-9-100: Buffers, Landscaping, and Tree Requirements, of the County Code. Tree permits must be obtained prior to any land clearing/ fill activity or the issuance of any building permits.
2. According to the Protected Species Assessment submitted, the project boundary contains 20 potentially occupied gopher tortoise burrows. Applicant will need to provide a Gopher Tortoise After-Action Report or Burrow Excavation Completion Report stating the burrows have been excavated / bucket-trapped and tortoise moved out of harm's way for Tree Removal Approval.
3. At the time of development, the project must comply with Chapter 3-5, Article IV, Clearing, Filling and Soil Conservation requirements of the County Code. Best Use Management Plans must be documented on final site plans and utilized during all land clearing and development activities.
4. The project must also comply with Chapter 3-5, Article XVI, Open Space/Habitat Reservation Trust requirements of the County Code. Given the presence of habitat for use by listed species, the Final site and Landscape plans should depict, and label as preserved, in perpetuity a minimum of 5% of the development area for preservation area with calculations shown to meet or exceed requirements OR absence of preservation of habitat, the applicant must contribute an equal amount of \$300 per acre or fraction thereof, to the Open Space/Habitat Reservation Fund.

5. When you apply for a permit for this building, apply under "145 Parade Cir" and ensure your unit numbers are labeled numerically only.
6. The lots were not consolidated at the time of review. Final approval will be contingent upon the lots being consolidated and the owner completing an occupation of easement for the landscaping in the rear easements. If the lots are not consolidated prior to final review, the reversion clause will not apply, and the owner will need to do an occupation of easement for the paving and landscaping for each lot in addition to the landscaping the rear lots.
7. Reviewed site plan. All structures are subject to further review at time of building permitting.
8. Fire hydrant required to within 300' of each building.
9. If the building(s) is required to have a fire sprinkler system, then the FDC (Fire Dept. Connection) shall be within 100' of the fire hydrant.
10. Per Charlotte County Ordinance 3-3-4 (5) Fire hydrants shall be installed as may be necessary so that the distance between hydrants does not exceed 800 feet. The minimum flow from any hydrant shall be such that it is designed to deliver 1250 G.P.M. at 20 pounds P.S.I. residual pressure for a minimum of two hours.
11. FDC shall be a 5" Storz connection with a height of 30" above finish grade and at a 30-degree angle.
12. Roadways shall be at least 20' wide of clear space for fire department access.
13. Gates/access arms shall be installed with an EVAC System for emergency operation use.
14. Please be advised that the subject project will require Stormwater Plan Approval per Charlotte County Stormwater Management Ordinance No. 89-37 / County Code 3-5-111 to 3-5-123. The following link provides the Stormwater Plan Approval submittal procedures & requirements, and a downloadable Stormwater Plan Approval Application:

<https://www.charlottecountyfl.gov/departments/community-development/building-construction/permits/stormwater-permit.html>
Please call 941-575-3650 with any questions.
15. Conditional use under OMI Zoning, parcel was zoned before 1997 which means multi-family is consistent with Future Land Use. Density requirements are met.
16. The tree survey shows a 32-inch oak to be removed. Justification for removal of heritage tree has not been provided per Section 3-9-100.3. Every effort must be made to accommodate existing heritage trees.
17. Verify all utilities are shown and a minimum separation of 10 feet is maintained between the critical root zones of proposed trees and underground utilities. Some trees appear close to water lines – will root barriers be used? Overhead power lines along Parade Circle are not shown/labeled.

18. Trees proposed along Parade Circle are not listed as trees allowed for planting under power lines in Section 3-9-100 Exhibit 7. Provide verification that the species proposed are acceptable under the FPL Right Tree Right Place guidelines or adjust species to meet these standards.
19. Verify no more than 50 feet of separation between required trees in perimeter landscape strips – specifically verify gap in trees along Parade Circle near walkway does not exceed 50 feet.
20. Any signage proposed? If so, please identify on landscape plans and verify no visibility conflicts with required trees.
21. Additional review is required at time of Final Site Plan Review. Provide a revised landscape plan, in addition to written responses, at time of Final Site Plan Review.
22. All utilities construction must be performed in accordance with the Utilities Department approved and signed plans and in accordance with any conditions specified in the Utility Department plans approval letter.
23. Utility Agreement must be executed, and all applicable utility connection fees must be paid prior to construction of utilities.
24. Use CCU Application for Plans Review and Utility Agreement and Minimum Technical & Drawing Standards found at Engineering Services | Charlotte County, FL (charlottecountyfl.gov)

Preliminary Site Plan approval is valid for 12 months. If you wish to request a 12-month extension, you must make this request in written form a minimum of 30 days prior to the expiration date. Final site plan approval will not be granted until all conditions are met. No permits to build will be issued until final approval. If you have any questions regarding the review, please call the listed reviewer. There is an \$85 fee for this one-time extension.

Shaun Cullinan

Shaun Cullinan
Planning and Zoning Official



December 17, 2025

Atwell

4161 Tamiami Trail, Building 5, Unit 501
Port Charlotte, FL 33952

Attn: Steven Sonberg, P.E.

Re: Harbor West; CCU Project No. 25/1056

Dear Mr. Sonberg,

The referenced project engineering plans are approved. This approval letter and approved plans shall be submitted for a final project approval to the Charlotte County Site Plan Review Process. If any changes occur during the Charlotte County Site Plan Review Process that impacted the Utility approved plans, a resubmittal will be required.

Any utility changes incurred after the final Charlotte County Site Plan Review Process approval will require a resubmission to the Utility, and to the Charlotte County Site Plan Review Process, if deemed necessary.

This approval is valid for 1 year from the date shown on the CCU stamp on the Cover Sheet. Please contact our Engineering Services Coordinator at 941-764-4510 when final Charlotte County Site Plan Review Process approval, if applicable, has been granted and/or the developer is ready to initiate action on this project.

You will receive a PDF of the stamped, approved plans along with a CCU checklist which reflects, line-by-line, the current water and sewer Minimum Drawing Requirements. This was developed to assist you on the information CCU will be evaluating during the initial engineering construction plan review and the review of the as-built and record drawings.

Note: All FDEP and other required permits must be obtained and copies on file with CCU before any construction of utility mains occur.

FDEP clearance documentation to be signed by the Utilities Director shall include signed and sealed drawings (including approved CADD files) for the improvements that are being requested for clearance. Redlines and as-built drawings not signed and sealed, will no longer be accepted for clearance documentation. Partial FDEP clearance requests may be signed and sealed by a licensed land surveyor or the Engineer of Record. Final FDEP clearance requests shall be signed and sealed by the EOR.

Please note: All shop drawings shall be submitted to the Utility Department for review and approval prior to

start of construction.

If you have any questions, feel free to contact me at Basia.Baster@CharlotteCountyFL.gov or 941-764-4586.

Sincerely,

Basia Baster

Basia Baster-Cegerenko
Charlotte County Utilities

A handwritten signature in blue ink, reading "Bruce R. Bullert".

Bruce R. Bullert P.E.
Charlotte County Utilities
Engineering Services Manager

<u>SOURCES (Permanent)</u>			<u>USES</u>		
First Mortgage	\$	800,000	Acquisition Costs	\$	935,000
HOME Loan	\$	6,173,749	General Development Costs	\$	1,616,000
4% Equity	\$	4,700,000	Financial Costs	\$	1,012,865
SHIP Funds	\$	400,000	Construction Costs	\$	8,031,135
Deferred Developer Fee	\$	1,599,166	Furniture Fixtures & Equipment	\$	25,000
			Working Capital	\$	125,115
			Developer Fee	\$	1,927,800
TOTAL SOURCES	\$	13,672,915	TOTAL USES	\$	13,672,915

				<i>Total Budget</i>
Acquisition Costs				
	Land	Land Purchase Price	\$	935,000
Total - Acquisition Costs				\$ 935,000
General Development Costs				
	Due Diligence	Accounting/Cost Certification	\$	50,000
	Due Diligence	Appraisal	\$	10,000
	Due Diligence	Environmental	\$	75,000
	Due Diligence	Market Study	\$	7,500
	Due Diligence	Soil Borings/Testing	\$	10,000
	Due Diligence	Survey	\$	30,000
	Due Diligence	Utility Allowance Study	\$	10,000
	Due Diligence	Plan and Cost Review	\$	5,000
	Design Costs	Architect	\$	175,000
	Design Costs	Engineering - Civil/Site	\$	150,000
	Design Costs	NGBS/Energy Star Cert.	\$	35,000
	Legal	Owner Legal	\$	300,000
	General Expenses	FHFC Fees	\$	123,000
	General Expenses	Inspections/Draw Review	\$	105,000
	General Expenses	Real Estate/Property Tax	\$	15,000
	Insurance	Builder's Risk	\$	125,000
	Insurance	Property/Liability Insurance	\$	66,000
	Insurance	Title Insurance & Recording Fees	\$	100,000
Total - General Development Costs				\$ 1,391,500
General Development Costs				
	Charlotte County Fees	Permit Fees	\$	59,500
	Charlotte County Fees	Utility Connection Fee	\$	165,000
Total Charlotte County Fees				\$ 224,500
Financial Costs				
	Lender Loan	Lender Loan Fees	\$	86,750
	Lender Loan	Construction Loan Interest	\$	550,000
	LIHTC	LIHTC Fees	\$	218,818
	Legal	Lender Legal	\$	80,000
	Soft Cost Contingency	Soft Cost Contingency	\$	77,297
Total - Financial Costs				\$ 1,012,865
Construction Costs				
	Construction	New Construction	\$	7,648,700
	Hard Cost Contingency	Hard Cost Contingency	\$	382,435
Total - Construction Costs				\$ 8,031,135
Furniture Fixtures & Equipment				
	FF&E	FF&E	\$	25,000
Total - Furniture Fixtures & Equipment				\$ 25,000
Working Capital				
	Operating Reserve	Operating Reserve	\$	100,115
	Marketing	Marketing / Administrative Exps	\$	25,000
Total - Working Capital				\$ 125,115
Developer Fee				
	Developer Fee	Developer Fee	\$	1,927,800
Total - Developer Fee				\$ 1,927,800
TOTAL SOURCES				\$ 13,672,915

Unit Mix

Unit Type	Units	Gross Rent	Utility	Net (ProForma)	
			Allowance	Rent	
1 Br - 50% AMI	2	\$ 823	\$ 165	\$	658
1 Br - 60% AMI	2	\$ 987	\$ 165	\$	822
2 Br - 50% AMI	4	\$ 987	\$ 200	\$	787
2 Br - 60% AMI	22	\$ 1,185	\$ 200	\$	985
3 Br - 50% AMI	1	\$ 1,141	\$ 230	\$	911
3 Br - 60% AMI	1	\$ 1,370	\$ 230	\$	1,140
32					