

In compliance with the Americans with Disabilities Act, if you need special assistance in this meeting, please contact the District Secretary at (951) 699-1630. Notification 72 hours prior to the meeting will generally enable District staff to make reasonable arrangements to ensure accessibility. (28 CFR 35.102.35.104 ADA Title II)

## REGULAR BOARD MEETING OF THE BOARD OF TRUSTEES

### TEMECULA PUBLIC CEMETERY DISTRICT

September 18, 2025 @ 8:00 a.m.

41911 C St, Temecula, Ca 92592

951-699-1630

1. CALL TO ORDER-

2. PLEDGE OF ALLEGIANCE

3. ROLL CALL-Chair Kelleher, Vice Chair Vanderhaak, Trustee Davis, Trustee Dugan, Trustee Qualm, General Manager, Beaudet, Admin Santos

#### **4. PUBLIC COMMENT ON ANY AGENDA ITEM-**

Members of the public are invited to address the Board concerning any items not on the agenda but are within the subject matter jurisdiction of the Board of Trustees.

Members of the public may address the Board on agenda items when those matters come up for discussion for a total of 3 minutes.

#### **5. CONSENT CALENDAR-**

All matters listed under the Consent Calendar are considered routine and may all be approved by one motion. There will be no discussion of these matters unless members of the Board request an item removed from the Consent Calendar for separate action.

- A. APPROVAL OF MINUTES BOARD MEETING, AUGUST 21, 2025
- B. APPROVAL OF CHECK REGISTERS- AUGUST 2025
- C. APPROVAL OF BOOKKEEPER REPORT- AUGUST 2025
- D. APPROVAL OF AUGUST FINANCIALS

#### **6. INFORMATION ITEMS-**

- A. District Managers Monthly Report
- B. Correspondence-CAPC MANAGEMENT
- C. Incidents-NONE

## **7. BOARD DISCUSSION AND POSSIBLE ACTION ITEMS-**

- A. SHELBY BURSON- AGAPE CONSTRUCTION
- B. BRIAN HUGHES- BBK LAW SPECIAL DISTRICTS LEGAL COUNSEL
- C. CEMETERY FINANCING

## **8. TRUSTEE QUESTIONS AND COMENTS-**

- A. 52-acre Cemetery Property (Qualm, Dugan)
- B. Landscape Plan (Vanderhaak, Kelleher)
- C. Cenotaph/ Ossuary (Dugan, Davis)
- D. Conference Liaison (Davis, Vanderhaak)
- E. Policies (Dugan, Vanderhaak)
- F. General Price List (Dugan, Kelleher)
- G. Investments (Qualm-Davis)

## **9. RECESS TO CLOSED SESSION-**

All members of the public, employees and other visitors will be asked to clear the meeting room so that the Board of Trustees, and those employees and consultants invited by the Board, may discuss and/or act on those items listed below.

## **10. ADJOURNMENT-**

**1<sup>st</sup> Motion:**

**2<sup>nd</sup> Motion:**

**All in Favor:**

The Next Regular Meeting of the Temecula Public Cemetery Board of Trustees will be held on Thursday, October 16, 2025, at 8:00 a.m.

POSTED September 15, 2025

All supporting documentation is available for public review after the agenda has been posted and no less than 72 hours prior to the meeting date. The material will be made available at the Temecula Public Cemetery District Office during business hours, or on the website at: [www.temeculacemetery.org](http://www.temeculacemetery.org)

August 21, 2025 @ 8:00 a.m.

## MINUTES

### TEMECULA PUBLIC CEMETERY DISTRICT

41911 C St, Temecula, Ca 92592  
951-699-1630

1. CALL TO ORDER- Chair Kelleher - 8:00AM

2. FLAG SALUTE - Chair Kelleher

3. ROLL CALL-

Chair Kelleher, Vice Chair Vanderhaak, Trustee Davis,  
Trustee Dugan, Trustee Qualm, General Manager, Beaudet, Legal Counsel, Steve  
Quintinella, Admin Santos, Colin

4. MOTIONS TO EXCUSE- NONE

5. VISITORS- NONE

6. PUBLIC COMMENTS- Michael Stanley Krot- Michael Krot, ~~Ellison Krot~~  
Eligible-Non-Resident Dispute

Currently, members of the public are invited to address the Board concerning any items on the agenda, or on any other matters that are not on the agenda but are within the subject matter jurisdiction of the district. Requests must be submitted in writing or in person prior to the start of the meeting. Every person will be allowed 5 minutes to address the Board of Trustees; in accordance with State Law (Brown Act) all items to be acted on must be posted 72 hours in advance.

7. CLOSED SESSION

**WENT INTO RECESS**

Pending Litigation – Pursuant to California Government Code Section 54956.9

**Urgency Item-**

A motion was made to place an urgency item on the agenda that came to light after the agenda was posted. Motion made by Trustee Vanderhaak and seconded by Trustee Kelleher. The motion passed with a 5/0 vote.

Stephen Morton with Muni Finance

8. CONSENT CALENDAR- A motion was made by Trustee Dugan to receive the consent calendar as presented, seconded by Trustee Davis and passed with a 5/0 vote.

All matters listed under the Consent Calendar are considered routine and may all be approved by one motion. There will be no discussion of these matters unless members of the Board or the public request an item removed from the Consent Calendar for separate action. A total of five minutes is provided for members of the public to address the Trustees on items that appear in the consent calendar. Unless otherwise specified in the request to remove an item from the Consent Calendar, all items shall be considered immediately following action on the remaining items on the Consent Calendar.

A. APPROVAL OF MINUTES-

*Recommendation:* the Board approves the minutes of the Regular Board Meeting dated July 17, 2025.

B. APPROVAL OF CHECK REGISTERS

*Recommendation:* That the Board approves the July 2025 Check Registers, Nos. 101100, 101200 and 101300.

C. APPROVAL OF BOOKKEEPER REPORT-

*Recommendation:* That the Board receives and files the June 2025 Bookkeeper Report

9. ACTION ITEMS-

A. BOARD APPROVED COUNTY BUDGET AND RESOLUTIONS 2025-2026-

A motion was made by Trustee Vanderhaak to receive the 2025-2026 budget and file it with the County, seconded by Trustee Dugan and passed with a 5/0 vote.

*Recommendation:* That the Board receives and approves the County budget

DISCIPLINARY PROCEDURES- POLICY # 4090- A motion was made by Trustee Davis to accept policy # 4090, seconded by Trustee Qualm and passed with a 5/0 vote.

B.

*Recommendation:* That the Board receives and approves the policy to go into effect August 2025

10. FINANCIAL REPORTS- A motion was made by Trustee Dugan to receive and file the July 2025 financials, seconded by Trustee Vanderhaak and passed with a 5/0 vote.

- A. July 2025 Balance Sheet
- B. July 2025 Profit and Loss
- C. July 2025 California Class
- D. July Stifel Reports

## **11. GENERAL MANAGERS REPORTS-**

- A. July 2025 Revenues
- B. July 2025 Inventory
- C. August Transfers from Stifel to Class
- D. July Calendar

## **12. FISCAL YEAR 2025-2026 SUBCOMMITTEES-**

- A. 52-acre Cemetery Property (Qualm, Dugan)
- B. Landscape Plan (Vanderhaak, Kelleher)
- C. Cenotaph/ Ossuary (Dugan, Davis)
- D. Conference Liaison (Davis, Vanderhaak)
- E. Policies (Dugan, Vanderhaak)
- F. General Price List (Dugan, Kelleher)
- G. Investments (Qualm-Davis)

## **13. ITEMS FOR FUTURE TRUSTEE AGENDAS-**

Any Trustee may request an item placed on a future agenda. Any such request shall be discussed only under this section. In making the request, a Trustee may briefly describe the topic of the proposed agenda item. This description shall not exceed 5 minutes. No substantive discussion on the subject or a motion may occur.

**Legal Counsel**

**Security**

14. BOARD COMMENTS-

15. ADJOURNMENT- 9:01 am

1<sup>st</sup> Motion: Trustee Dugan

2<sup>nd</sup> Motion: Trustee Vanderhaak

All in Favor: 5/0

The Next Regular Meeting of the Temecula Public Cemetery Board of Trustees will be held on Thursday, September 18, 2025, at 8:00 a.m.

# Temecula Public Cemetery District

9/11/2025 8:25 AM

Register: 101100 · US Bank Checking

From 08/01/2025 through 08/31/2025

Sorted by: Date, Type, Number/Ref

Date	Number	Payee	Account	Memo	Payment	C	Deposit	Balance
08/01/2025			101100G · Cash - Gen...	Deposit		X	7,920.00	86,612.47
08/04/2025	9677	United Staffing Asso...	201100 · Accounts Pay...	255923	1,372.80	X		85,239.67
08/04/2025	9678	David ETorres	201100 · Accounts Pay...		163.13	X		85,076.54
08/04/2025	9679	Good Fence	201100 · Accounts Pay...		14,900.00	X		70,176.54
08/04/2025	9680	Summers Murphy & ...	201100 · Accounts Pay...	25-1991	7,920.00	X		62,256.54
08/04/2025	9681	Hunsaker & Associat...	201100 · Accounts Pay...	25050173	10,304.99	X		51,951.55
08/04/2025	9682	Law Offices Of Quin...	201100 · Accounts Pay...		9,075.00	X		42,876.55
08/05/2025	0	Downs Energy	201100 · Accounts Pay...	CL-00844	218.76	X		42,657.79
08/05/2025	9683	American Mini Storage	201100 · Accounts Pay...		115.00	X		42,542.79
08/05/2025	9684	EcoFert Inc	201100 · Accounts Pay...	6527	600.00	X		41,942.79
08/05/2025	9685	Everon	201100 · Accounts Pay...	159283977	382.52	X		41,560.27
08/05/2025	9686	GEO Soils Inc	201100 · Accounts Pay...	80900	294.00	X		41,266.27
08/05/2025	9687	Lawnscap Systems L...	201100 · Accounts Pay...	453930	1,738.00	X		39,528.27
08/05/2025	9688	Nutrien Ag Solutions	201100 · Accounts Pay...		1,307.98	X		38,220.29
08/05/2025	9689	PureRite Drinking W...	201100 · Accounts Pay...	379971	107.17	X		38,113.12
08/05/2025	9690	South County Pest C...	201100 · Accounts Pay...	0308277	59.00	X		38,054.12
08/05/2025	9691	Streamline	201100 · Accounts Pay...	7235D26B-0058	130.00	X		37,924.12
08/05/2025	9692	Prudential Overall Su...	201100 · Accounts Pay...		362.39	X		37,561.73
08/06/2025			101100G · Cash - Gen...	Deposit		X	14,900.00	52,461.73
08/06/2025	0	County of Riverside ...	201100 · Accounts Pay...	00334609	2,739.00	X		49,722.73
08/07/2025	9693	Ewing Irrigation Pro...	201100 · Accounts Pay...		876.45	X		48,846.28
08/07/2025	9694	Wildlife Control Ser...	201100 · Accounts Pay...	WL4012	500.00	X		48,346.28
08/08/2025	JE 113		515100 · Life Insuranc...	Automatic with...	31.90	X		48,314.38
08/11/2025		Accounting Vendor	201100 · Accounts Pay...	QuickBooks ge...		X		48,314.38
08/11/2025	9695	Agriscap	201100 · Accounts Pay...		100.05	X		48,214.33
08/11/2025	e073125	CalPers 457 Plan	201100 · Accounts Pay...	08/01	1,973.62	X		46,240.71
08/12/2025	0	Compass HR	201100 · Accounts Pay...	4717	225.00	X		46,015.71
08/12/2025	0	CalPers 457 Plan	201100 · Accounts Pay...	08/15	1,975.54	X		44,040.17
08/12/2025			101300 · US Wash Ac...	Dugan reimbur...		X	75.50	44,115.67
08/12/2025			101200 · US Bank Pay...	Funds Transfer	11,287.65	X		32,828.02
08/13/2025	0	County of Riverside ...	201100 · Accounts Pay...	0033-5672	2,000.00	X		30,828.02
08/14/2025			101100G · Cash - Gen...	Deposit		X	78,096.25	108,924.27
08/20/2025			-split-	Deposit		X	13,572.02	122,496.29
08/20/2025	9696	County of Riverside L...	201100 · Accounts Pay...	IT 3061	223.30	X		122,272.99
08/20/2025	9697	CR&R Incorporated	201100 · Accounts Pay...	001580239	424.19	X		121,848.80
08/20/2025	9698	Crowne Hill Consulti...	201100 · Accounts Pay...	19417	531.09	X		121,317.71
08/20/2025	9699	Downs Energy	201100 · Accounts Pay...	CL-00844	218.76			121,098.95
08/20/2025	9700	Ewing Irrigation Pro...	201100 · Accounts Pay...		956.67	X		120,142.28
08/20/2025	9701	Hunsaker & Associat...	201100 · Accounts Pay...	25060068	1,456.00	X		118,686.28
08/20/2025	9702	Linda Glau CPA	201100 · Accounts Pay...		1,749.00	X		116,937.28

# Temecula Public Cemetery District

9/11/2025 8:25 AM

Register: 101100 · US Bank Checking

From 08/01/2025 through 08/31/2025

Sorted by: Date, Type, Number/Ref

Date	Number	Payee	Account	Memo	Payment	C	Deposit	Balance
08/20/2025	9704	Southern California ...	201100 · Accounts Pay...	2-03-325-4707	884.47	X		116,052.81
08/20/2025	9705	Standard Insurance C...	201100 · Accounts Pay...	160-513170-00...	358.00			115,694.81
08/20/2025	9706	United Staffing Asso...	201100 · Accounts Pay...	256492	1,716.00	X		113,978.81
08/20/2025	9707	United Staffing Asso...	201100 · Accounts Pay...	256744	1,716.00	X		112,262.81
08/20/2025	9708	EcoFert Inc	201100 · Accounts Pay...	6496-June	600.00	X		111,662.81
08/25/2025		Vast Data Concepts	523840 · Computer Eq...	as seen on bank...	59.00	X		111,603.81
08/25/2025	0825	California Public Em...	201100 · Accounts Pay...	7490021932 ...	4,457.90	X		107,145.91
08/25/2025	0829	CalPers 457 Plan	201100 · Accounts Pay...	08/29	1,957.38	X		105,188.53
08/25/2025	9709	Kyle Means	201100 · Accounts Pay...		163.07	X		105,025.46
08/25/2025	9710	Residential Restorati...	201100 · Accounts Pay...	Office interior ...	1,600.00			103,425.46
08/25/2025			101200 · US Bank Pay...	Funds Transfer	10,928.39	X		92,497.07
08/27/2025	0901	Metlife	201100 · Accounts Pay...	KMO5754034-...	42.75			92,454.32
08/27/2025	9711	Cem Sites	201100 · Accounts Pay...	25279	3,550.00			88,904.32
08/27/2025	9712	Crowne Hill Consulti...	201100 · Accounts Pay...	19476	326.24			88,578.08
08/27/2025	9713	Everon	201100 · Accounts Pay...	6852917	5,702.02			82,876.06
08/27/2025	9714	GEO Soils Inc	201100 · Accounts Pay...	81399	125.50			82,750.56
08/27/2025	9715	Nigro & Nigro Corp...	201100 · Accounts Pay...	20920	5,500.00			77,250.56
08/27/2025	9716	Pal Office Supplies	201100 · Accounts Pay...	9473	155.00			77,095.56
08/27/2025	9717	Summers Murphy & ...	201100 · Accounts Pay...		3,715.00			73,380.56
08/27/2025	9718	Verizon Wireless	201100 · Accounts Pay...	3120959006	235.02			73,145.54
08/27/2025	9719	United Staffing Asso...	201100 · Accounts Pay...	256210	1,716.00			71,429.54
08/27/2025	9720	United Staffing Asso...	201100 · Accounts Pay...	257007	1,716.00			69,713.54
08/28/2025	9721	Cindi Beaudet	201100 · Accounts Pay...	REIMBURSE...	149.90			69,563.64
08/31/2025			740029 · Interest Inco...	Interest		X	7.50	69,571.14
08/31/2025			523290 · Bank Charges	Service Charge	17.11	X		69,554.03

# Temecula Public Cemetery District

9/11/2025 8:26 AM

Register: 101200 · US Bank Payroll

From 08/01/2025 through 08/31/2025

Sorted by: Date, Type, Number/Ref

Date	Number	Payee	Account	Memo	Payment	C	Deposit	Balance
08/01/2025	JE 121		510040 · Regular Salar...	Bank Draft Am...	6,377.44	X		17,196.33
08/01/2025	JE 121		510040 · Regular Salar...	Bank Draft Am...	1,210.35	X		15,985.98
08/01/2025	JE 121		510040 · Regular Salar...	Bank Draft Am...	3,641.26	X		12,344.72
08/01/2025	JE 121		510040 · Regular Salar...	Monthly charg...	176.03	X		12,168.69
08/12/2025			101100 · US Bank Che...	Funds Transfer		X	11,287.65	23,456.34
08/15/2025	JE 111		510040 · Regular Salar...	Bank Draft Am...	6,147.98	X		17,308.36
08/15/2025	JE 111		510040 · Regular Salar...	Bank Draft Am...	1,319.31	X		15,989.05
08/15/2025	JE 111		510040 · Regular Salar...	Bank Draft Am...	3,644.33	X		12,344.72
08/15/2025	JE 111		510040 · Regular Salar...	Monthly charg...	176.03	X		12,168.69
08/20/2025	23	Paychex	524540 · Payroll Proce...	Electronic Wit...	134.00	X		12,034.69
08/25/2025			101100 · US Bank Che...	Funds Transfer		X	10,928.39	22,963.08
08/29/2025	JE 111		510040 · Regular Salar...	Bank Draft Am...	6,003.63	X		16,959.45
08/29/2025	JE 111		510040 · Regular Salar...	Bank Draft Am...	1,339.18	X		15,620.27
08/29/2025	JE 111		510040 · Regular Salar...	Bank Draft Am...	3,446.26	X		12,174.01
08/29/2025	JE 111		510040 · Regular Salar...	Monthly charg...	139.32	X		12,034.69
08/31/2025			740027 · Interest Inco...	Interest		X	1.06	12,035.75

# Temecula Public Cemetery District

9/11/2025 8:26 AM

Register: 101200 · US Bank Payroll

From 08/01/2025 through 08/31/2025

Sorted by: Date, Type, Number/Ref

Date	Number	Payee	Account	Memo	Payment	C	Deposit	Balance
08/01/2025	JE 121		510040 · Regular Salar...	Bank Draft Am...	6,377.44	X		17,196.33
08/01/2025	JE 121		510040 · Regular Salar...	Bank Draft Am...	1,210.35	X		15,985.98
08/01/2025	JE 121		510040 · Regular Salar...	Bank Draft Am...	3,641.26	X		12,344.72
08/01/2025	JE 121		510040 · Regular Salar...	Monthly charg...	176.03	X		12,168.69
08/12/2025			101100 · US Bank Che...	Funds Transfer		X	11,287.65	23,456.34
08/15/2025	JE 111		510040 · Regular Salar...	Bank Draft Am...	6,147.98	X		17,308.36
08/15/2025	JE 111		510040 · Regular Salar...	Bank Draft Am...	1,319.31	X		15,989.05
08/15/2025	JE 111		510040 · Regular Salar...	Bank Draft Am...	3,644.33	X		12,344.72
08/15/2025	JE 111		510040 · Regular Salar...	Monthly charg...	176.03	X		12,168.69
08/20/2025	23	Paychex	524540 · Payroll Proce...	Electronic Wit...	134.00	X		12,034.69
08/25/2025			101100 · US Bank Che...	Funds Transfer		X	10,928.39	22,963.08
08/29/2025	JE 111		510040 · Regular Salar...	Bank Draft Am...	6,003.63	X		16,959.45
08/29/2025	JE 111		510040 · Regular Salar...	Bank Draft Am...	1,339.18	X		15,620.27
08/29/2025	JE 111		510040 · Regular Salar...	Bank Draft Am...	3,446.26	X		12,174.01
08/29/2025	JE 111		510040 · Regular Salar...	Monthly charg...	139.32	X		12,034.69
08/31/2025			740027 · Interest Inco...	Interest		X	1.06	12,035.75

Date: 09/10/2025

Remote Tasks Performed: Save Statements and Reconciliations to PDF starting October 2025

- X Download, Save, Print California CLASS Menu/Statements
- X Reconcile Three California CLASS accounts Print the Reconciliation Reports
- X Enter CA Class Transfers as required
- X Enter Transfers to/from US Bank Transfer Account based on bank statements
- X Reconcile four US Bank Cash Accounts
- X Enter/Update Transactions as Required
- X Reconcile four County Cash Accounts Statements
- X Enter Property Taxes - Code Deposits as Necessary
- X Support Voucher Balance to County

- X Journal activity Two Stifel Accounts using Stifel Balancing sheet
- X Reconcile two Stifel Accounts
- X Save the Stifel Account Statements for the auditor
- X Reconcile two Stifel interest receivable accounts
- X Print Stifel Snapshot– for Board Packets

X Verify check sequence is intact 9695- 9728

X Verify each check over \$2500 from the US Bank General account has two signatures. Note:  
US Bank Wash account checks to the county are exempt from this requirement.

Number	Date	Payee	Amount	Memo	2nd Sig
9711	8/27/2025	Site Industries	3,550.00	Annual Cen Site Mapping License	Yes
9713	8/27/2025	Everon	5,702.02	New Security System	Yes
9715	8/27/2025	Nigro & Nigro	5,500.00	Audit	Yes
9717	8/27/2025	Summers Murphy	3,715.00	Landscaper New Property	Yes
9725	9/2/2025	US Bank	2,598.75	Credit Card Bill	Yes

X Verify all checks to the GM have two signatures.

Number	Date	Payee	Amount	Memo	2nd Sig
9721	8/28/2025	Cindi Beaudet	149.90	Reimburse Mileage and Recycling	Yes

X Check monthly credit card statements for receipts and reasonableness. Initial credit card.  
Note that receipts are attached and expenses are reasonable.

X Confirm Proper Endowment Income figure booked

X For the GM – When she creates the report, Add Difference to Balance Sheet. In Excel, change the difference column to white. Then for all reasonable totals/subtotals, change it to black.

X On the Profit and Loss – for the Gm when she creates the report – Show only the Year to Date and Annual Budget Figures. Check Pagination.

X Update Endowment Allocation Schedule.

X Update Wash Account Analysis.

X Update Prepaid subledger and validate QB information.

X Read Agenda and Minutes of the previous Board Meeting.

X Continue Audit Process

**Temecula Public Cemetery District**  
**Balance Sheet**  
**As of August 31, 2025**

	Aug 31, 25	Aug 31, 24	\$ Change
<b>ASSETS</b>			
<b>Current Assets</b>			
<b>Checking/Savings</b>			
101100 · US Bank Checking	69,554.03	43,323.87	
101200 · US Bank Payroll	12,035.75	11,507.99	
101300 · US Wash Account	1,683.42	11,202.61	
101400 · US Bank Transfer Bank	73.91	10.61	
101100C · Cash -Accumulative Outlay Fund	21,668.04	102,219.73	
101100E · Cash - Endowment Fund	149,292.03	91,040.54	
1011004 · Cash - Retirement	180.00	180.00	
101100G · Cash - General	1,773,389.14	1,505,928.09	
<b>Total Checking/Savings</b>	<b>2,027,876.32</b>	<b>1,765,413.44</b>	<b>262,462.88</b>
<b>Other Current Assets</b>			
103200 · California CLASS General	2,581,844.64	2,467,088.85	
103201 · CA CLASS Principle	1,208,430.60	198,745.09	
103202 · CA Class Interest	541,091.58	147,341.79	
102200 · Stifel Investments			
102210 · Stifel Endowment Care	1,406,344.68	2,385,768.74	
102220 · Stifel Endowment Interest	665,061.72	922,253.28	
<b>Total 102200 · Stifel Investments</b>	<b>2,071,406.40</b>	<b>3,308,022.02</b>	<b>-1,236,615.62</b>
112011 · Inventory Asset	171,538.00	179,253.38	
102100 · Taxes Receivable	-0.64	15,975.82	
116100 · Interest Receivable			
116100P · Interest Receivable - End Prin	11,976.56	22,198.92	
116100I · Interest Receivable - End Int	6,897.08	10,530.29	
<b>Total 116100 · Interest Receivable</b>	<b>18,873.64</b>	<b>32,729.21</b>	
117000 · PrePaid Expenses	38,493.03	53,114.98	
<b>Total Other Current Assets</b>	<b>6,631,677.25</b>	<b>6,402,271.14</b>	<b>229,406.11</b>
<b>Total Current Assets</b>	<b>8,659,553.57</b>	<b>8,167,684.58</b>	<b>491,868.99</b>

**Temecula Public Cemetery District**  
**Balance Sheet**  
**As of August 31, 2025**

	Aug 31, 25	Aug 31, 24	\$ Change
<b>Fixed Assets</b>			
191650 · Intangible Assets	24,470.00	24,470.00	
198950 · Accum Depr - Software	-9,787.98	-8,156.65	
191000 · Future Cemetery Property	4,800,528.36	4,502,448.23	
191100 · Buildings and Improvements	325,151.13	316,825.07	
191400 · Structures and Improvements	300,917.01	296,248.92	
191500 · Equipment	137,916.86	63,896.39	
191600 · Construction in Process	4,500.00	0.00	
191700 · Non-Depreciable Assets	77,561.02	77,561.02	
191800 · Grounds Improvements	59,226.50	51,461.50	
191900 · Paving 2015	143,560.00	143,560.00	
198100 · Accumulated Depreciation - Bldg	-224,024.06	-204,968.60	
198400 · Accumulated Depr - Struct/Imp	-234,796.17	-220,894.63	
198500 · Accum Depr - Equipment	-22,183.64	-12,183.77	
198800 · Accum Depr- Grnd Imp	4,308.46	-9,448.60	
198900 · Accum Depr-Pav 15	-72,772.02	-65,594.02	
<b>Total Fixed Assets</b>	<b>5,314,575.47</b>	<b>4,955,224.86</b>	<b>359,350.61</b>
<b>TOTAL ASSETS</b>	<b>13,974,129.04</b>	<b>13,122,909.44</b>	<b>851,219.60</b>
<b>LIABILITIES &amp; EQUITY</b>			
<b>Liabilities</b>			
<b>Current Liabilities</b>			
<b>Accounts Payable</b>			
201100 · Accounts Payable	4,475.88	3,299.70	
<b>Total Accounts Payable</b>	<b>4,475.88</b>	<b>3,299.70</b>	
<b>Other Current Liabilities</b>			
212200 · Accrued Vacation Pay	22,590.45	16,917.19	
<b>Total Other Current Liabilities</b>	<b>22,590.45</b>	<b>16,917.19</b>	
<b>Total Current Liabilities</b>	<b>27,066.33</b>	<b>20,216.89</b>	
<b>Total Liabilities</b>	<b>27,066.33</b>	<b>20,216.89</b>	<b>6,849.44</b>
<b>Equity</b>			
36001 · Net Investments in Cap Assets	3,309,357.00	3,309,357.00	
36002 · Endowment Care Corpus	2,635,110.00	2,635,110.00	
36003 · Endowment Care Earnings	821,514.00	821,514.00	
36004 · Unrestricted Earnings ACO Fund	2,930,348.00	2,930,348.00	
36005 · Unrestricted Earnings Gen Fund	882,307.00	882,307.00	
325100G · Unreserved Fund Balance - Gen	280,455.17	280,455.17	
390000 · Retained Earnings	3,113,203.38	2,214,813.72	
Net Income	-25,231.84	28,787.66	
<b>Total Equity</b>	<b>13,947,062.71</b>	<b>13,102,692.55</b>	<b>844,370.16</b>
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<b>13,974,129.04</b>	<b>13,122,909.44</b>	<b>851,219.60</b>

# Temecula Public Cemetery District

## Profit & Loss Budget Performance

### August 2025

	Jul - Aug 25 Annual Budget	
Ordinary Income/Expense		
Income		
700001 · Property Taxes		
700020 · Prop Tax Current Secured	0.00	800,000.00
701020 · Prop Tax Current Unsecured	0.00	40,000.00
703000 · Prop Tax Prior Unsecured	0.00	1,000.00
704000 · Prop Tax Curr Supplemental	0.00	25,000.00
705000 · Prop Tax Prior Supplemental	1,344.22	7,000.00
706000 · Teeter Settlement	0.00	4,000.00
707000 · RDV Apportionment	0.00	125,000.00
752800 · CA-Homeowners Tax Relief	0.00	5,000.00
770100 · Property Tax - SBE	-0.64	16,000.00
Total 700001 · Property Taxes	1,343.58	1,023,000.00
740020 · Interest and Dividend Income		
740020G · Interest on General Fnd at Cnty	0.00	30,000.00
74002GF · FMV Adj County General	-3,671.66	0.00
740020E · Interest on Endow Fnd at County	0.00	1,200.00
74002EF · FMV Adj County Endowment	-262.61	0.00
740020O · Interest on ACO at County	0.00	1,000.00
74002OF · FMV Adj County ACO	-40.58	0.00
740023 · Interest - Stifel	10,962.67	46,800.00
740024 · Dividend Income - Stifel	2,835.08	14,000.00
740026 · Interest Income US Bank Wash	4.25	0.00
740027 · Interest Income US Bank Payroll	2.16	0.00
740028 · Interest Inc US Bank Clearing	6.21	0.00
740029 · Interest Income US Bank General	13.78	0.00
740025 · Interest Inc - CA CLASS General	18,906.13	60,000.00
740030 · Interest Inc CA CLASS Principle	7,456.28	20,000.00
740031 · Interest Inc CA CLASS Interest	3,482.70	13,000.00
Total 740020 · Interest and Dividend Income	39,694.41	186,000.00

# Temecula Public Cemetery District

## Profit & Loss Budget Performance

### August 2025

	Jul - Aug 25	Annual Budget
<b>770001 · Other Revenue</b>		
777700 · Non-Resident Fee Income	1,548.00	18,000.00
770100E · Endowment	9,594.00	46,000.00
777030 · Marker Setting	6,346.00	15,000.00
777031 · Niche Engraving	523.00	3,500.00
777040 · Open, Close Fees	8,104.00	55,000.00
777520 · Sale of Lots	12,680.00	105,000.00
777530 · Cremation	7,475.00	23,000.00
777600 · Cenotaph	0.00	300.00
777650 · Graveside Service	2,813.00	22,000.00
780160 · Vaults, Flower Vases, etc.	2,348.00	14,000.00
781360 · Other Misc. Revenue	310.00	2,000.00
<b>Total 770001 · Other Revenue</b>	<b>51,741.00</b>	<b>303,800.00</b>
<b>Total Income</b>	<b>92,778.99</b>	<b>1,512,800.00</b>
<b>Gross Profit</b>	<b>92,778.99</b>	<b>1,512,800.00</b>
<b>Expense</b>		
<b>510000 · Salaries and Employee Benefits</b>		
<b>510040T · Regular Salaries.</b>		
510040 · Regular Salaries	40,652.77	425,000.00
510330 · Incentive Pay	0.00	8,000.00
515100 · Life Insurance Policy	63.80	450.00
<b>Total 510040T · Regular Salaries.</b>	<b>40,716.57</b>	<b>433,450.00</b>
<b>513000T · Retirement - Miscellaneous</b>		
518000 · Employer Contributions-457	3,643.01	27,400.00
551000 · Employee Contributions	0.00	0.00
<b>Total 513000T · Retirement - Miscellaneous</b>	<b>3,643.01</b>	<b>27,400.00</b>
<b>513120T · Retirement - Social Security</b>		
513120 · Social Security	2,613.49	27,000.00
513140 · Medicare Tax	611.22	6,500.00
<b>Total 513120T · Retirement - Social Security</b>	<b>3,224.71</b>	<b>33,500.00</b>
<b>515080T · Health Insurance (eer share)</b>		
515081 · Health Insurance	8,922.93	77,000.00
515082 · Vision Insurance	128.25	750.00
515083 · Dental Insurance	716.00	6,000.00
<b>Total 515080T · Health Insurance (eer share)</b>	<b>9,767.18</b>	<b>83,750.00</b>
<b>515260T · Unemployment Insurance</b>		
517000 · Workers Comp Insurance	3,891.36	24,000.00
515060 · State Unemployment Ins EDD	0.00	1,500.00
513130 · CA SUI	25.50	2,000.00
<b>Total 515260T · Unemployment Insurance</b>	<b>3,916.86</b>	<b>27,500.00</b>
<b>Total 510000 · Salaries and Employee Benefits</b>	<b>61,268.33</b>	<b>605,600.00</b>

# Temecula Public Cemetery District

## Profit & Loss Budget Performance

### August 2025

	Jul - Aug 25	Annual Budget
<b>520000 · Services and Supplies</b>		
<b>529540T · Utilities</b>		
520845 · Trash	832.10	5,000.00
529500 · Electricity	1,691.76	8,500.00
<b>Total 529540T · Utilities</b>	<b>2,523.86</b>	<b>13,500.00</b>
<b>524520T · Administrative Expenses</b>		
518160 · Board Stipend	750.00	10,000.00
520115 · Uniforms - Replacement Clothing	922.11	5,500.00
520230 · Cellular Phone	705.77	3,200.00
520705 · Food	46.75	1,000.00
520930 · Insurance - Liability	2,842.66	18,000.00
523100 · Memberships	130.00	4,500.00
523290 · Bank Charges	34.37	450.00
523621 · Subscriptions	3,550.00	5,500.00
523660 · Computer Service	557.25	11,000.00
523700 · Office Supplies	0.00	3,000.00
523720 · Photocopies	494.75	3,700.00
523760 · Postage/Mailing	0.00	1,200.00
523780 · Programs	0.00	2,000.00
523840 · Computer Equip/Software/T1	1,263.08	5,000.00
524520 · County Journal Recording	257.88	2,900.00
524530 · Storage Fees	230.00	1,500.00
524540 · Payroll Processing Services	1,236.05	8,100.00
524560 · Auditing	5,500.00	10,500.00
524561 · Accounting	3,333.00	12,000.00
524566 · Temp for e-File	0.00	15,000.00
524567 · Temporary Employees	14,757.60	30,000.00
524800 · Drug Testing/Pre-Employment	0.00	1,000.00
525025 · Legal - General Counsel	79.95	30,000.00
525030 · Compass HR Support	450.00	3,000.00
526420 · Advertising	0.00	2,800.00
527280 · Awards/Recognition	0.00	300.00
527880 · Training/ Staff	0.00	3,000.00
528140 · Conferences and Meetings	0.00	30,000.00
528980 · Meals	418.98	3,000.00
528990 · Semi-Annual Team Dinner	868.25	6,500.00
529040 · Private Mileage Reimbursement	331.73	3,000.00
529050 · Website	236.83	5,000.00
529550 · Water	390.80	2,000.00
<b>Total 524520T · Administrative Expenses</b>	<b>39,387.81</b>	<b>243,650.00</b>

**Temecula Public Cemetery District**  
**Profit & Loss Budget Performance**  
**August 2025**

	Jul - Aug 25	Annual Budget
524500T · Operational Expenses.		
521420 · Maint-Field Equipment	1,601.80	17,000.00
522310 · Maint-Building Improvements	0.00	5,000.00
522320 · Maint - Grounds	4,662.42	30,000.00
522360 · Maintenance-Extermination	1,059.00	7,000.00
523250 · Repurchase	0.00	1,000.00
523800 · Engraving Expense	0.00	5,000.00
525600 · Security	656.14	3,500.00
527100 · Fuel	905.08	5,000.00
527180 · Operational Supplies	1,270.97	30,000.00
528020 · Inventory	169.00	16,000.00
<b>Total 524500T · Operational Expenses.</b>	<b>10,324.41</b>	<b>119,500.00</b>
<b>Total 520000 · Services and Supplies</b>	<b>52,236.08</b>	<b>376,650.00</b>
530000 · Other Charges		
530100 · Miscellaneous non-operating exp	517.77	5,000.00
530100E · Misc Endowment Expense	0.00	0.00
<b>Total 530000 · Other Charges</b>	<b>517.77</b>	<b>5,000.00</b>
540000 · Capital Assets		
542060T · Cemetery Grounds		
542040 · - Buildings, Capital Projects	5,702.02	50,000.00
542060 · Improvements -Building	1,600.00	15,000.00
542065 · Tree Renovaton	0.00	25,000.00
548300 · Office Renovation	0.00	7,500.00
<b>Total 542060T · Cemetery Grounds</b>	<b>7,302.02</b>	<b>97,500.00</b>
540040T · Land, Purchase of Land		
540042 · Future Cemetery Property	538.00	2,000,000.00
<b>Total 540040T · Land, Purchase of Land</b>	<b>538.00</b>	<b>2,000,000.00</b>
546020T · Equipment, etc		
542070 · Well Motor	0.00	60,000.00
546020 · Equipment - Automotive	0.00	110,000.00
<b>Total 546020T · Equipment, etc</b>	<b>0.00</b>	<b>170,000.00</b>
<b>Total 540000 · Capital Assets</b>	<b>7,840.02</b>	<b>2,267,500.00</b>
<b>Total Expense</b>	<b>121,862.20</b>	<b>3,254,750.00</b>
<b>Net Ordinary Income</b>	<b>-29,083.21</b>	<b>-1,741,950.00</b>
Other Income/Expense		
Other Income		
731000 · Realized Gain (Loss) on Invest	0.00	0.00
731100 · Unrealized Gain (Loss) on Invst	3,851.37	0.00
<b>Total Other Income</b>	<b>3,851.37</b>	<b>0.00</b>
<b>Net Other Income</b>	<b>3,851.37</b>	<b>0.00</b>
<b>Net Income</b>	<b>-25,231.84</b>	<b>-1,741,950.00</b>



August 1 -  
August 31, 2025  
Account Number:

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7449-7270

TEMECULA PUBLIC CEMETERY  
DIST ENDOWMENT PRINCIPAL  
41911 C ST  
TEMECULA CA 92592-3053

Your Financial Advisor (LU04):  
SANDRA HEDSTROM WHEELER  
Telephone: (805) 783-2921

Office Serving Your Account:  
4460 BROAD STREET  
SUITE 210  
SAN LUIS OBISPO, CA 93401

**PRIMARY INVESTMENT OBJECTIVE: Income**  
**RISK TOLERANCE: Moderate**

For a full definition of this objective and risk tolerance, including the use of margin, please see [www.stifel.com](http://www.stifel.com), IMPORTANT DISCLOSURES, or contact your Financial Advisor. If you have any questions concerning your investment objective or risk tolerance, or wish to make a change, please contact your Financial Advisor or the Branch Manager for this office.

**TRADING TAX LOT RELIEF METHOD: First In, First Out**  
**INVESTOR UPDATE**

At June 30, 2025, Stifel, Nicolaus & Company, Incorporated had net capital of \$381,949,344 or \$356,611,684 in excess of the minimum requirement of \$25,337,660. The June 30, 2025 Statement of Financial Condition is available at no charge by calling (800) 488-0970 or logging onto [www.stifel.com](http://www.stifel.com).

**ACCOUNT PROTECTION**

Stifel, Nicolaus & Company, Incorporated provides up to \$150 million of coverage for securities held in client accounts, of which \$1.15 million may be in cash deposits. Ask your Financial Advisor for more details.

Thank you for allowing Stifel to serve you. In order to protect your rights, including rights under the Securities Investor Protection Act (SIPA), please promptly report, in writing, any inaccuracies or discrepancies in this account or statement to the Compliance Department of Stifel at the address below. If you have any questions regarding your account or this statement, please contact your Financial Advisor or the Branch Manager for this office. For additional information regarding your Stifel account, please refer to the current Stifel Account Agreement and Disclosure Booklet, which is available at [www.stifel.com/disclosures/account-agreement](http://www.stifel.com/disclosures/account-agreement).

**STIFEL ACCOUNT STATEMENT**

PORTFOLIO SUMMARY	August 31	July 31
Net Cash Equivalents **		250,069.08
Net Portfolio Assets held at Stifel	1,406,344.68	1,425,996.72
Net Portfolio Assets not held at Stifel		
<b>Net Portfolio Value</b>	<b>\$1,406,344.68</b>	<b>\$1,676,065.80</b>
YOUR CHANGE IN PORTFOLIO VALUE	August 31	July 31
Net Cash Flow (Inflows/Outflows) <sup>2</sup>	-277,152.54	-1,110.30
Securities Transferred In/Out		
Income and Distributions	3,054.92	2,099.86
Change in Securities Value	4,376.50	-1,473.40
<b>Net Change in Portfolio Value</b>	<b>-\$269,721.12</b>	<b>-\$483.84</b>

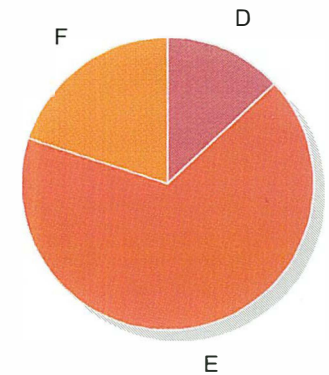
\*\* See the Stifel Insured Bank Deposit Program Disclosure Statements for additional information.

<sup>2</sup> Does not include cost or proceeds for buy or sell transactions.

You have securities maturing and/or options expiring.

**YOUR ASSET SUMMARY**

	Value on August 31, 2025 (\$)	Percentage of your account
D Fixed Income-Muni	183,713.75	13.06%
E Fixed Income-Other	941,808.34	66.97%
F Mutual Funds	280,822.59	19.97%
<b>Total Assets</b>	<b>\$1,406,344.68</b>	<b>100.00%</b>





August 1 -  
August 31, 2025  
Account Number:

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7683-0158

TEMECULA PUBLIC CEMETERY  
DIST ENDOWMENT INTEREST  
41911 C ST  
TEMECULA CA 92592-3053

Your Financial Advisor (LU04):  
SANDRA HEDSTROM WHEELER  
Telephone: (805) 783-2921

Office Serving Your Account:  
4460 BROAD STREET  
SUITE 210  
SAN LUIS OBISPO, CA 93401

**PRIMARY INVESTMENT OBJECTIVE:** Income

**RISK TOLERANCE:** Moderate

For a full definition of this objective and risk tolerance, including the use of margin, please see [www.stifel.com](http://www.stifel.com), IMPORTANT DISCLOSURES, or contact your Financial Advisor. If you have any questions concerning your investment objective or risk tolerance, or wish to make a change, please contact your Financial Advisor or the Branch Manager for this office.

**TRADING TAX LOT RELIEF METHOD:** First In, First Out

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#### ACCOUNT PROTECTION

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Thank you for allowing Stifel to serve you. In order to protect your rights, including rights under the Securities Investor Protection Act (SIPA), please promptly report, in writing, any inaccuracies or discrepancies in this account or statement to the Compliance Department of Stifel at the address below. If you have any questions regarding your account or this statement, please contact your Financial Advisor or the Branch Manager for this office. For additional information regarding your Stifel account, please refer to the current Stifel Account Agreement and Disclosure Booklet, which is available at [www.stifel.com/disclosures/account-agreement](http://www.stifel.com/disclosures/account-agreement).

## STIFEL ACCOUNT STATEMENT

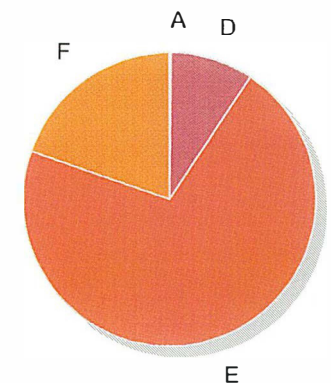
PORTFOLIO SUMMARY	August 31	July 31
Net Cash Equivalents **	1,593.75	24,905.18
Net Portfolio Assets held at Stifel	663,467.97	718,300.01
Net Portfolio Assets not held at Stifel		
<b>Net Portfolio Value</b>	<b>\$665,061.72</b>	<b>\$743,205.19</b>
YOUR CHANGE IN PORTFOLIO VALUE	August 31	July 31
Net Cash Flow (Inflows/Outflows) <sup>2</sup>	-82,435.24	1,110.30
Securities Transferred In/Out		
Income and Distributions	1,582.38	589.46
Change in Securities Value	2,709.39	-1,761.12
<b>Net Change in Portfolio Value</b>	<b>-\$78,143.47</b>	<b>-\$61.36</b>

\*\* See the Stifel Insured Bank Deposit Program Disclosure Statements for additional information.

<sup>2</sup> Does not include cost or proceeds for buy or sell transactions.

## YOUR ASSET SUMMARY

	Value on August 31, 2025 (\$)	Percentage of your account
A Net Cash Equivalents**	1,593.75	0.24%
D Fixed Income-Muni	60,499.20	9.10%
E Fixed Income-Other	471,981.96	70.97%
F Mutual Funds	130,986.81	19.70%
Total Assets	\$665,061.72	100.00%





# Summary Statement

August 31, 2025

Page 1 of 5

Investor ID: CA-01-0130

0000120-0000511 PDFT 820889

**Temecula Public Cemetery District**  
**41911 C St**  
**TEMECULA, CA 92592**

## California CLASS

### California CLASS

Average Monthly Yield: 4.3256%

		Beginning Balance	Contributions	Withdrawals	Income Earned	Income Earned YTD	Average Daily Balance	Month End Balance
CA-01-0130-0001	General Fund	2,572,394.26	0.00	0.00	9,450.38	73,963.73	2,573,308.81	2,581,844.64
CA-01-0130-0002	Endowment Principle	932,871.81	275,558.79	0.00	4,014.53	21,960.13	1,101,762.68	1,208,430.60
CA-01-0130-0003	Endowment Interest	451,211.30	88,043.52	0.00	1,836.76	11,668.27	503,279.19	541,091.58
<b>TOTAL</b>		<b>3,956,477.37</b>	<b>363,602.31</b>	<b>0.00</b>	<b>15,301.67</b>	<b>107,592.13</b>	<b>4,178,350.68</b>	<b>4,331,366.82</b>



## California CLASS

## California CLASS

Date	Dividend Rate	Daily Yield
08/01/2025	0.000357093	4.3447%
08/02/2025	0.000000000	4.3447%
08/03/2025	0.000000000	4.3447%
08/04/2025	0.000118622	4.3297%
08/05/2025	0.000118303	4.3181%
08/06/2025	0.000118435	4.3229%
08/07/2025	0.000118367	4.3204%
08/08/2025	0.000355839	4.3294%
08/09/2025	0.000000000	4.3294%
08/10/2025	0.000000000	4.3294%
08/11/2025	0.000118535	4.3265%
08/12/2025	0.000118440	4.3231%
08/13/2025	0.000118539	4.3267%
08/14/2025	0.000118082	4.3100%
08/15/2025	0.000354759	4.3163%
08/16/2025	0.000000000	4.3163%
08/17/2025	0.000000000	4.3163%
08/18/2025	0.000118372	4.3206%
08/19/2025	0.000118413	4.3221%
08/20/2025	0.000118150	4.3125%
08/21/2025	0.000117952	4.3053%
08/22/2025	0.000354957	4.3186%
08/23/2025	0.000000000	4.3186%
08/24/2025	0.000000000	4.3186%
08/25/2025	0.000118790	4.3359%
08/26/2025	0.000119036	4.3448%
08/27/2025	0.000118978	4.3427%
08/28/2025	0.000118728	4.3336%
08/29/2025	0.000355377	4.3238%
08/30/2025	0.000000000	4.3238%
08/31/2025	0.000000000	4.3238%

Performance results are shown net of all fees and expenses and reflect the reinvestment of dividends and other earnings. Many factors affect performance including changes in market conditions and interest rates and in response to other economic, political, or financial developments. Investment involves risk including the possible loss of principal. No assurance can be given that the performance objectives of a given strategy will be achieved. **Past performance is no guarantee of future results. Any financial and/or investment decision may incur losses.**

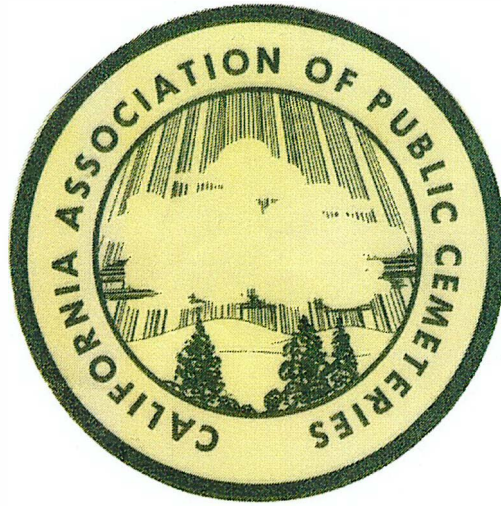
A2Cemetery Property  
Fiscal Year 2025-2026

06/30/26	25-Jun	Jul	Aug
Dual Lower -GM	226	226	226
Dual Upper -GP	308	308	308
Dual/ Single	39	38	38
Dual Manager	22	22	22
Singles	76	74	73

Hexagon Wall			
Tier 1			
Tier 2			
Tier 3			
Tier 4			
Tier 5			
Tier F-1	7	7	7
Tier F-2	14	14	13
Tier F-3	22	22	22
Tier F-4	26	26	26
Tier F-5	8	8	8
Grd Crem	14	14	14
Dual Grd Crem	52	51	51
Cenotaph	46	46	46
Ossuary	325	325	325

A1 Monthly Revenues  
July 2025-June 2026

<u>FYE 06/30/26</u>	<u>July</u>	<u>August</u>
Single	6,400.00	3,280.00
Single End	2,000.00	1,000.00
Single/Dual	3000	0
S/D End	1,000.00	-
Dual	-	-
Dual End	-	-
Collum	-	1,950.00
Colum End	516.00	1,000.00
cenotaph	-	-
Ground Crem	1,900.00	-
G Crem End	1,000.00	-
O/C -B	3384.00	2330.00
O/C/-C	723.00	531.00
Vault	0.00	328.00
Crem Vase	-	87.25
Grave Vase	122.00	61.00
Set Fee	4336.00	1700.00
Niche	-	-
Non-Res	-	-
Disinter	-	-
Graveside	1758.00	1055.00
Engraving	258.00	265.00
2nd End	-	-
Bench	3320.00	925.00
Bench Endow	1,548.00	530.00
Taxes	10.68	41.67
Labor	695.32	787.08
Total	31,971.00	15,871.00
YTD Total	31,971.00	47,842.00



**California Association of Public Cemeteries  
(CAPC)**

**Future Management Starting 2028**

**Request for Proposal (RFP'S) are now available upon request if you are interested in submitting a bid for the CAPC Management that starts January 2028.**

**Proposals need to be submitted to CAPC by January 31, 2026.**

**Please call or email CAPC for an RFP and all of the detailed information about the management duties that goes with it.**

**If you have any questions, please feel free to contact Carol Griese at the CAPC @ 951-925-1111 or at [publiccemeteries@gmail.com](mailto:publiccemeteries@gmail.com)**

**Thank you.**