

What our management company does for our neighborhood:

The resources of our management company provide the association with a reliable, consistent paper trail and knowledge of, and adherence to, real estate law and correct procedures. This ensures smoother board member transitions and continuing success of the neighborhood. Included in Heritage Management's services:

Monthly Financials: *send the Association records that include copies of every invoice paid, put every invoice into a proper General Ledger account so the report will accurately reflect the funds received as well as dispersed. The accounting staff is headed by a CPA, with 13 associates working in the department. The checks are processed usually on a weekly basis and paid after the invoices have been received within the proper time frame to avoid the Association receiving late fees.*

Recordkeeping: *provide all documents necessary for our association taxes to be prepared and provides the association with a copy of all prepared IRS forms.*

Dues: *Late notices are sent to homeowners whose assessment dues are delinquent, if necessary for the Association to turn the delinquent party over to the Attorney for lien or suit, Heritage will forward the needed information as instructed by the board.*

If a member has not paid dues by the pool opening date, Heritage will then send the party a pool key once the funds have been received and recorded.

Bill and keep track of receipts on individual accounts: Huntington West has several classes of memberships.

1. **Mandatory** for each home sold on or after 2/06/98.
2. **Non-Mandatory** for those who owned their homes before that date and choose not to join the Association.
3. **Voluntary** for those who want to join the Association and for pool and tennis court (amenity) usage
4. **Associate** for those who want to contribute to the upkeep and value that the Association adds to each home in the neighborhood

Real Estate Transactions: *Heritage has a closing department that keeps track of each reported sale so there will be a legal record to enter the name of the new owner and if necessary charge Association dues if the home changes from Non-Mandatory to Mandatory. They issue a letter to real estate agents and selling homeowners that notifies them of the protective covenants and mandatory HOA membership status in Huntington West. This letter also notifies the real estate agents to make certain that the sale is reported. This not only gives the information to legally change the name of the owner, it advises if any funds are owed to the Association and these funds are collected at the closing. The Board Members advise of any homes that are for sale in the community so Heritage can send this letter. This letter for Huntington West also tells of the renting restrictions on the use of the property as an investment.*

Covenants: *Send out violation letters to homeowners not in compliance of covenants, as reported to them by the board or committee, and keeps track of the progress in having these violations corrected. The board makes the decision as to when the issue is corrected, as Heritage does not have the authority to do so. This takes the violation from being a personal matter to becoming one of property enhancement, thus helping every owner maintain the value of their home and the community. A copy of each violation letter is sent to the committee.*

These are a few of the extra services for Huntington West which would add countless extra hours to the work load of a voluntary board that would make this position difficult, if not impossible to perform for a neighborhood of our size. In addition to ensuring the accuracy of the financial information that would require the work perhaps of an outside resource, these services are performed at a very reasonable cost for the amount of work entailed.

Note from the 2009 HWHOA Board: We are fortunate to have detailed records from 2003 to present, due to the service Heritage has provided. Unfortunately, it has proven difficult if not impossible to find particular information before this time.