



Homestead Owners Association and Court Club

March 2017

Dear Homestead Homeowner:

The following information will be provided annually to all Homestead Homeowners in compliance with the Senate Bill 100 (SB-100).

ASSOCIATION’S NAME:

Homestead Owners Association

ASSOCIATION’S MISSION STATEMENT:

The Homestead Owners Association’s mission is to work with Homeowners to create and maintain the most desirable living environment by enforcing home and property regulations to increase property’s values; creating a sense of community through regular communications, neighborhood programming and events; maintaining and developing the Homestead parks, trails, and open space; and managing the Homestead Court Club to the finest tennis and fitness facility for all our members.

MANAGING AGENT:

In house staff located on the first floor of the Club with the following management:

- General Manager: Tracy Erickson, terickson@homesteadcourtclub.com
- Fitness Director: Justin Songer, justin@homesteadcourtclub.com
- Programming Director: Kim Baugh, kim@homesteadcourtclub.com
- Tennis Program: Tom & Laura Ewert, tennis@homesteadcourtclub.com
- Childhood Programming Director: Jillian Labbe, jillian@homesteadcourtclub.com
- Accountant: Karen Nulle, kmn@vail.net

Off site staff may be contacted by phone:

- Monthly Review Accountant: McKay & Associates (970-926-3416)
- Tax Prep & Compilation: Novosad, Lyle & Associates (970-845-8000)

BOARD OF DIRECTORS LIST :

- Katie Demore
- Erin Allen
- Matt Drummet
- Alyson Leingang
- Bill McNamara
- David Portman
- Jim Pyke

Email: board@homesteadcourtclub.com or for election Nominate@homesteadcourtclub.com

ADDRESS

400 Homestead Drive
P.O. Box 808
Edwards, CO 81632
www.hcchoa.com
Phone: 970-926-1067
Fax: 970-926-4710

COMMON INTREST COMMUNITY:

Homestead Owners Association, Inc.

FISCAL YEAR OF THE ASSOCIATION:

January 1st through December 31st of any given year.

OPERATING BUDGET:

Available as a separate document in the Management Office within 90 days of approval.

ASSOCIATION'S CURRENT REGULAR AND SPECIAL ASSESSMENTS:

Available as a separate document in the Management Office and is included in the monthly billing.

ANNUAL ACCOUNTING REVIEW, FINANCIAL STATEMENT AND RESERVE FINANCES FOR THE PREVIOUS YEAR:

Available as a separate document in the Management Office on February 1st of any given year or at the General Meeting.

INSURANCE POLICIES:

Report all claims promptly to Homestead Staff or Shanti Cartmell, Lead Account Manager, at Assured Partners. Email scartmell@assuredptrco.com, direct phone (970) 945-5593.

Coverage schedules and limits of coverage are available as a separate document in the Management Office or refer to the "Insurance Policy List" on the document page of our website for more information on our insurance policies.

ASSOCIATION'S BYLAWS, ARTICLES AND RULES & REGULATIONS:

Available as a separate document in the Management Office.

POLICIES:

Available as separate documents in the Management Office.

- A) Articles of Incorporation
- B) Declaration of Covenants, Conditions, and Restrictions
- C) Bylaws
- D) PUD Guidelines for Filing 1
- E) PUD Guidelines for Filing 2
- F) PUD Guidelines for Filing 3
- G) PUD Guidelines for Homestead Open Space

- H) Architectural Standards and Guidelines
- I) Yearly Accountant Reviewed Financial Report
- J) Past Board of Directors Meeting Minutes
- K) Past Newsletters
- L) Past Surveys sent out
- M) Billing Statement
- N) Past Budgets
- O) Current Budget
- P) List of Board Members & their contact information
- Q) Homestead Owners Association Rules and Regulations including all policies.
- R) Homestead Court Club Rules and Regulations
- S) New Homeowner Welcome Packet
- T) Homestead Wage and Salary schedule
- U) Homestead insurance policy discloser list
- V) A “sellers” packet including Buyer acknowledgment form to be returned to Homestead

OBTAINING DOCUMENTATION

All documentation discussed in this letter is available for a fee in the Management Office during office hours. The Management Office is open from 9am-5pm Monday through Friday. The Management Office is not open on Holidays. A fee will be charged for any copies of a document at a rate of \$.25 per page. All documents will be available for pickup within 5 business days of the request.

Sincerely,

Homestead Homeowners Association