

The Heritage at Jefferson HOA

Email:theheritagehoa@gmail.com

BOARD OF DIRECTORS

ANNUAL MEETING MINUTES

1/24/2021 2:00PM

Opening: The regular meeting of The Heritage at Jefferson HOA was called to order at 2:05 pm on January 24, 2021 in the Clubhouse. This was our annual meeting and everyone was introduced and their roles.

Present: Jeffery Sapp – President
Andy Burton – Vice President
Toya Clay – Treasurer
Heather Baxter – Secretary

Members at large present: Patrick Evans, Jade Yarbrough

Discussion:

Nathan Jaworski with Greener Accounting and Tax Service was there to present our 2020 financials (attached) in which it was explained that our HOA is currently in very good standings. Jeffery started the meeting by going down the agenda (attached). Jeffery discussed plans for 2021 which include:

- New pool company (since we were unhappy with the performance and maintenance of the pool company for 2020). We are looking at R&R Pools, which is a local company.
- New parking area for the pond located on Ronald Reagan Ln. This should be completed in the next few weeks (waiting on completion of wire/rope fence and posts leading down to the pond area as well as signage).
- Plans for pool expansion (approved by HOA Board at Dec. 2020 meeting). This will include a 0-24” entry pool with mushroom, additional seating area, separate pump system and pump house. Please see attached detailed plans for the new pool area. Ground breaking will be in 3-4 weeks and plans to open in April 2021.

Open discussion from residents:

- Chairs at the pool: plans are to open all pool chairs for residential use for the 2021 pool season.

- Suggestion to have a separate management company to monitor neighborhood covenants/violations. This is something the HOA board will look into (costs).
- Tennis courts: plans to replace the nets this year (2021)
- Complaint about roaming dogs and to please monitor the “whereabouts” of your pet(s) to avoid being a nuisance to other neighbors.
- New pool company: no increase in costs. The benefit is that this new company (R&R Pools) is local.
- Look into expanding sidewalks when pool company/landscapers come in to pour concrete for new pool area.
- Minutes from HOA meetings to be posted to website.
- Need to add more woodchips to the playground area and also look into the cost of variation of ground cover (rubber chips) to see if the cost would be in our budget.
- It was mentioned by Jeffery Sapp that we have taken a residential vote on proposed camera system, and since this was voted down by the residents, it would not be looked into further.
- Pat Evans let residents at meeting know that an unmarked police vehicle would be periodically sitting in his driveway on Ronald Reagan Ln. to watch those that may be running the stop sign(s) on Ronald Reagan Ln. and Jefferson Blvd.
- Resident mentions that there is a makeshift “treehouse” on HOA property at the end of Ronald Reagan Ln. and that this needs to be removed asap as this is on HOA property and also because it is causing a buildup of debris/trash in surrounding area as well as on the street (which can cause damage to vehicle tires).

It was also mentioned by Jeffery Sapp, President, that the Nextdoor App will **not be used by the HOA and to please email any concerns or questions to the HOA email (theheritagehoa@gmail.com).**

An election of officers was done for 2021. No changes were made from 2020.

President - Jeffery Sapp

Vice President - Andy Burton

Treasurer - Toya Clay

Secretary - Heather Baxter (also clubhouse rental coordinator)

Members at large – Pat Evans
Jade Yarbrough

Committee members:


Welcoming – Brittany Odom

Social – Christy Reese (Nikki Sapp stepped down from 2020 position)

The Heritage at Jefferson Home Owners' Association

Annual Meeting Agenda

Sunday, January 24th, 2021 2:00pm

Name (Print)	Address
Jeffery Sapp	2026 George Bush
Kelly + Keith Heard	659 Jeff P. 501
Kristina & Bucks ^{Regan}	411 Jefferson BLVD
Nathaniel 	787 Jefferson BLVD
Alexand Jade Yarbrough	1129 Abe Lincoln Way
Eric Zimmerman	1403 Ronald Reagan
Seth Odom	2194 George Bush Ln
Adam Rich	1361 Ronald Reagan
Kelly Sizemore	1267 Abe Lincoln way
Janelle Johnson	565 Jefferson Blvd
Wesley Belcher	1186 Abe Lincoln Way

decided

Name (Print)	Address
Patrick Evans	1341 Rowland Road
James Elrod	740 Jefferson Blvd
Kevin & Amanda Yarnough	520 Washington Parkway
Ernie & David Lee	37 Washington Parkway
Griffin	1505 Rowland Road
Jeremy Bennett	865 Jefferson Blvd
Brett Bray	3045 George Bush Court
Lindsay Ivester	

The Heritage at Jefferson Homeowners Association

PROFIT AND LOSS January - December 2020

	TOTAL
Income	
Association Assessments	50.00
Dues	96,255.19
Initiation Fee	9,375.00
Key Fob Replacement fee	300.00
Monthly Late Charge	740.00
NSF	70.00
Returned check charge	-12.00
Sales	-1,057.44
Unapplied Cash Payment Income	0.00
Total Income	\$105,720.75
GROSS PROFIT	\$105,720.75
Expenses	
Bank Service Charges	24.00
Cleaning/Janitorial	1,533.31
Clubhouse	435.27
Commons and Pool area supplies	958.51
Greenspace	2,800.00
Pest Control	315.00
Fire Ant Control	730.00
Total Pest Control	1,045.00
Repairs	626.74
Security	2,470.96
Total Clubhouse	8,336.48
Common Area	950.00
Maint - Ponds and Common Area	10,860.00
Total Common Area	11,810.00
Contract Labor	
Lawn Maintenance Labor	6,624.65
Lawn Treatment/Ant Killer	4,466.65
Total Contract Labor	11,091.30
Front Entrance	
Repair Flag Pole	71.62
Total Front Entrance	71.62
General Maintenance	
Maintenance - General	5,450.00
Total General Maintenance	5,450.00

The Heritage at Jefferson Homeowners Association

PROFIT AND LOSS

January - December 2020

	TOTAL
Insurance	
General Liability Insurance	2,346.97
Professional Liability Ins	1,190.00
Total Insurance	3,536.97
Miscellaneous	
Home Owner Assoc Activites	357.09
Welcome Bags	15.97
Total Miscellaneous	373.06
Pool	
Annual Pool Inspection	300.00
Enviromental Health Fee	150.00
Maintenance	8,132.40
Pool Supplies	251.68
Repairs	310.85
Total Pool	9,144.93
Printing and Reproduction	137.63
Professional Fees	
Accounting Fees	2,450.00
Total Professional Fees	2,450.00
QuickBooks Subscription	360.00
Rent	
Post Office Box	112.00
Total Rent	112.00
Returned check	50.00
Taxes	5.60
Unapplied Cash Bill Payment Expense	0.00
Utilities	
Electricity	2,885.36
Telephone	2,171.46
Water/Garbage	1,263.82
Total Utilities	6,320.64
Total Expenses	\$60,807.54
NET OPERATING INCOME	\$44,913.21
Other Income	
Insurance Reimbursement	1,100.24
Interest Income	66.73
Total Other Income	\$1,166.97
NET OTHER INCOME	\$1,166.97
NET INCOME	\$46,080.18

The Heritage at Jefferson Homeowners Association

BALANCE SHEET

As of December 31, 2020

	TOTAL
ASSETS	
Current Assets	
Bank Accounts	
Operating Account **6265	100,207.53
Reserve Account **4368	40,433.96
Total Bank Accounts	\$140,641.49
Accounts Receivable	
Accounts Receivable	470.00
Total Accounts Receivable	\$470.00
Other Current Assets	
Undeposited Funds	2,000.00
Total Other Current Assets	\$2,000.00
Total Current Assets	\$143,111.49
TOTAL ASSETS	\$143,111.49
LIABILITIES AND EQUITY	
Liabilities	
Total Liabilities	
Equity	
Retained Earnings	97,031.31
Net Income	46,080.18
Total Equity	\$143,111.49
TOTAL LIABILITIES AND EQUITY	\$143,111.49

Amazing Fence LLC
 2000 Thompson Mill Rd Suite 100
 Buford, GA 30518 US
 878-762-0288
 amazingfence@gmail.com



Estimate

ADDRESS: Andy Burkh
 111 Washington Place
 Jefferson

SNIP ID: Andy Burkh
 111 Washington Place
 Jefferson

ESTIMATE # 2762
 DATE: 12/1/2020

ACTIVITY	QTY	PRICE	AMOUNT
Post Note 1 Customer is responsible for supplying on site Survey which includes property lines, easements, set backs, egress lines if applicable. Necessary to obtain post permit in all counties.	1	0.00	0.00
Fee Paid for County Permits for Post Fee Paid for County Permits for Post: Design and Preparation is submit for permit, bring for permit, inspection management with customer required site survey	1	2,000.00	2,000.00
PL Posts Labor and materials for installation of 2x4x8 4 1/2" P. posts. Materials and labor to match existing posts and tie. Capping to match existing posts. All electrical plumbing work. Also, soil test, punch, Postcap system, Mountain Water Systems, Concrete Sealing of 1000 sq ft.	1	88,450.00	88,450.00
Labor/Labor Labor and materials to replace and/or upgrading interrupted during construction	1	1,000.00	1,000.00
Minor Materials to Labor and materials to construct a replacement post fence adjacent to existing post fence area	1	2,000.00	2,000.00
Paint/Aluminum Fence Block 7' tall Aluminum fence to match existing	1	14,000.00	14,000.00
Note This is only an estimate any changes to this will be approved prior to work being started	1	0.00	0.00
Note 2 Any Labor or on-site materials will be deducted from the bill	1	0.00	0.00
Note 3D Credit Card payment will be processing fee. Payment of credit/debit card is the fee of 1.75% per month. Customer that pay withing 15 and interest is collected through attorney.	1	0.00	0.00

ACTIVITY	QTY	RATE	AMOUNT
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the pool installation with in 8-10 weeks but
circumstances beyond our control can possibly
add time.

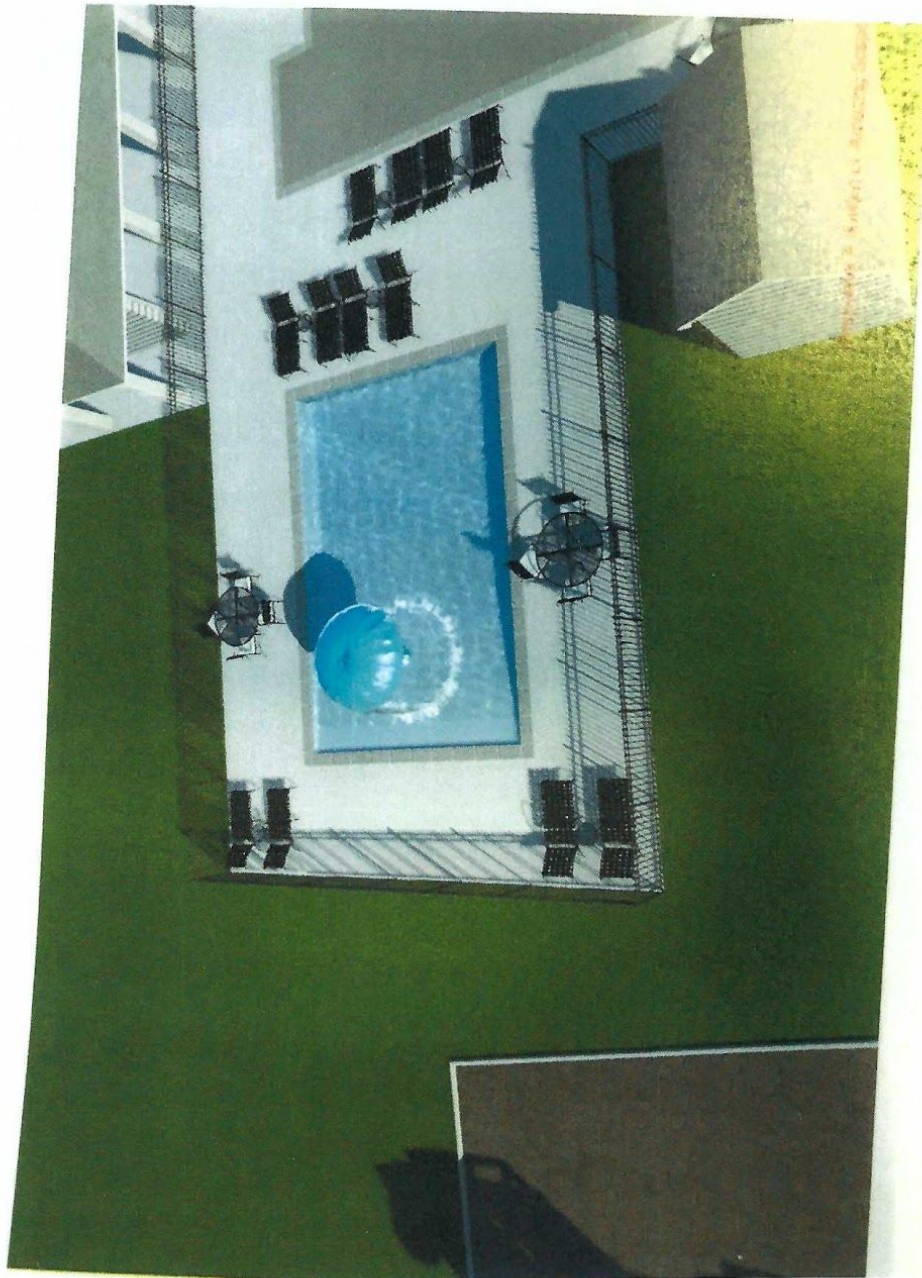
SUBTOTAL			89,450.00
TAX			0.00
TOTAL			\$89,450.00

Accepted By

Accepted Date

Credit Card payments add 3% processing fee.

"Interest on unpaid balance accrues at the rate of 1.5% per month. Customer shall pay attorney fees and expenses if collected through attorney."



The Heritage at Jefferson Home Owners' Association

Annual Meeting Agenda

Sunday, January 24th, ~~2020~~ 2:00pm

2021

1:45pm- Sign-in sheet available at Clubhouse entrance

2:00pm- Jeffery Sapp to call attention to meeting

I. Introduction of the HOA Board- Jeffery Sapp

Jeffery Sapp, President

Andy Burton, Vice President

Toya Clay, Treasurer

Heather Baxter, Secretary

II. Introduction of Members at Large and other Committee Chairs/ volunteers

Britany Odom – Welcoming/Heather Baxter – Clubhouse/ Jade Yarborrow – website and online forms/ Patrick Evans – Member at large

III. Welcome & call meeting to order- Jeffery Sapp

a. Announce sign-in sheet at door, please sign for attendance records

IV. Minutes from 2019 HOA meeting- Heather Baxter

V. Adopt minutes as official minutes of the 2019 The Heritage at Jefferson Home Owners' Association

VI. 2020 Financial Review- Toya Clay/Greener Accounting

VIII. Discussion Items- Jeffery Sapp

a. New Pool Company R&R Pools

b. Pool Expansion

c. New Parking Lot area for Small Pond

IX. Election of Officers, Committee Chairs/Volunteers

X. Open Discussion and Questions

IX. Meeting Adjourned

Any questions are to be addressed as they relate to each section. Please state your name and address before your questions.