

Summerlyn HOA Annual Meeting

January 14th 2026

Starts at 6:32pm

Agenda

Introductions - HRW & Current Board

New Property Manager

HOA Budget Review

Accomplishments

Reserve Projects

Questions

Board Membership Voting

Introductions

Board of Directors

Committees:

- Social/Community
- Beautification
- Pool
- Security
- Landscaping
- Others as needed

Greg Forde

- President/ARC

Crystal Dale

- ARC Committee

George
Concepcion

- VP/Secretary

Walter
Serrano

- Interim Treasurer

Paul Rosales

- Treasurer

Bill Vitellaro

- Board Member

Sonya
McLean

- Board Member

Property Manager: AJ

FAQ From Residents:

- **Swim Lessons:** The Board decided not to move forward with swim lessons, as the interested company was unable to meet the HOA's safety and liability requirements.
- **Dog Waste Stations:** A survey was distributed to residents regarding the addition of dog waste stations. Based on the majority of responses, including the Board, it was determined that this is not a necessary or value-added expense at this time.

Quote for dog waste was approximately \$300 per month plus \$2,500 installation

Procedures, Accomplishments & Goals

2026 New Procedures



Basketball goals are now permitted near the street but not in the street. **See pages 36 & 37 for the full language.** Residents must still comply with Town of Clayton's ordinances.



A new landscaping company, Pachitos Landscaping LLC, has been added as a secondary vendor. This allows the HOA to maintain competitive pricing for additional projects that fall outside the scope of our existing contract with Triple R.



There is a pending bid in from Panchitos Landscaping & Granite Hills

Panchitos Bids vs. Triple R for Additional Projects in 2025

Panchito

(Pinestraw)- \$1500

(Tree cutting)- \$700

(Emergency Tree Cut) - \$700

(Erosion)- \$2900

Triple R

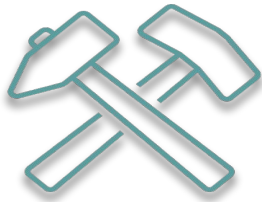
(Pinestraw) - \$4215

(Tree cutting)- \$1200

(Emergency Tree Cut)- \$1200

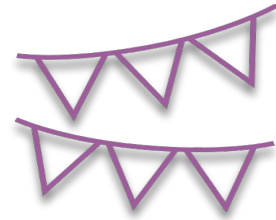
(Erosion)- \$4200

2025 Accomplishments



Community Improvements

Greenway Trail Repair
Reserve Study
Erosion repair x2



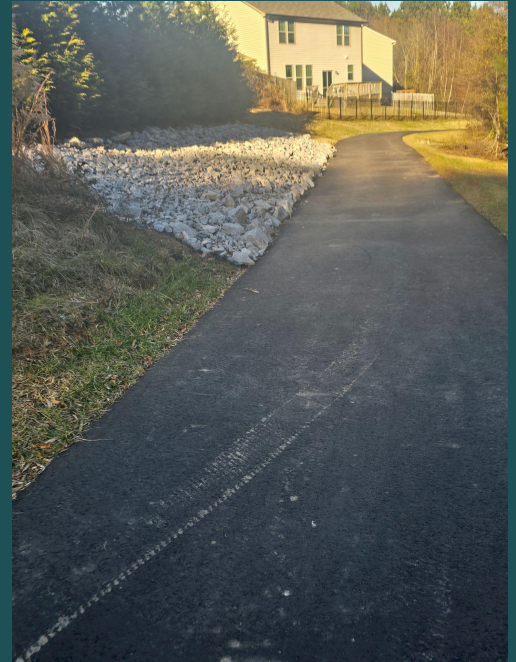
Community Events

Community Clean Up Day
Pool Grand Re-Opening
DJ Tenille & Music Bingo
Easter Egg Hunt
Halloween Decorating Contest
Holiday Decorating Contest

< - Before | After - >



Greenway Trail (After)



Greenway Trail (After)

11.5



What did it cost?

- The board called 10 asphalt pavers
- Walked the trail with 5
- Voted on Paving Professionals after walking the trail 6 times with contractor on site.

Vendor A - \$138,000

Vendor B - \$115,000

Vendor C - \$116,000

Vendor D- \$98,000

Paving Professionals - Negotiated to \$78,000

Wait 6-12 months before sealing

HOA Budget

Dept: 343 - Operating
SUM - 2026 Budget - Approved

	<u>2025 Budget</u>	<u>2026 Budget</u>
Assessment Income		
4000 - Residential Assessments	204,000.00	212,400.00
Total Assessment Income	204,000.00	212,400.00
Total Operating Income	204,000.00	212,400.00
Administrative		
5000 - General Administrative	11,680.00	9,000.00
Total Administrative	11,680.00	9,000.00
Communications		
5200 - Community Events	1,500.00	1,500.00
Total Communications	1,500.00	1,500.00
Insurance		
5400 - Insurance Premiums	4,270.00	4,400.00
Total Insurance	4,270.00	4,400.00
Utilities		
6000 - Electric Service	7,330.00	7,000.00
6025 - Water Service	2,860.00	4,500.00
6035 - Trash and Recycling Service	0.00	200.00
6050 - Telephone Service	2,072.00	2,000.00
Total Utilities	12,262.00	13,700.00
Landscaping		
6100 - Grounds & Landscaping - Contract	60,000.00	53,000.00
6199 - Landscape Other	4,706.00	4,000.00
Total Landscaping	64,706.00	57,000.00
Operations		
6300 - Permits & Licenses	600.00	300.00
Total Operations	600.00	300.00

Contracted Services		
6438 - Pool Management	43,000.00	43,000.00
6440 - Safety & Security	1,600.00	1,600.00
Total Contracted Services	44,600.00	44,600.00
Repair & Maintenance		
6515 - Pool House Repair & Maintenance	3,000.00	1,500.00
6700 - Pool Supplies/Repair & Maintenance	1,000.00	2,000.00
Total Repair & Maintenance	4,000.00	3,500.00
Professional Services		
7020 - Legal Services	2,000.00	300.00
7040 - Management Fees	22,230.00	22,860.00
Total Professional Services	24,230.00	23,160.00
Other Expenses		
9105 - Reserve Contribution Expense	33,952.00	55,240.00
Total Other Expenses	33,952.00	55,240.00
Total Operating Expense	201,800.00	212,400.00
Total Operating Net Income / (Loss)	2,200.00	0.00

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Fri Oct 10, 2025 09:48 am
Report: dwr_bx_summary_prior_year

User: 49292
Elizabeth Dienes

Budget Summary Report
Summerlyn
Dept: RESERVE - Reserves
SUM - 2026 Budget - Approved

	<u>2025 Budget</u>	<u>2026 Budget</u>
Investment Income		
4905 - Reserve Contribution Income	33,952.00	55,240.00
Total Investment Income	33,952.00	55,240.00
Total Reserves Income	33,952.00	55,240.00



Reserve Projects

Projected Reserve Projects

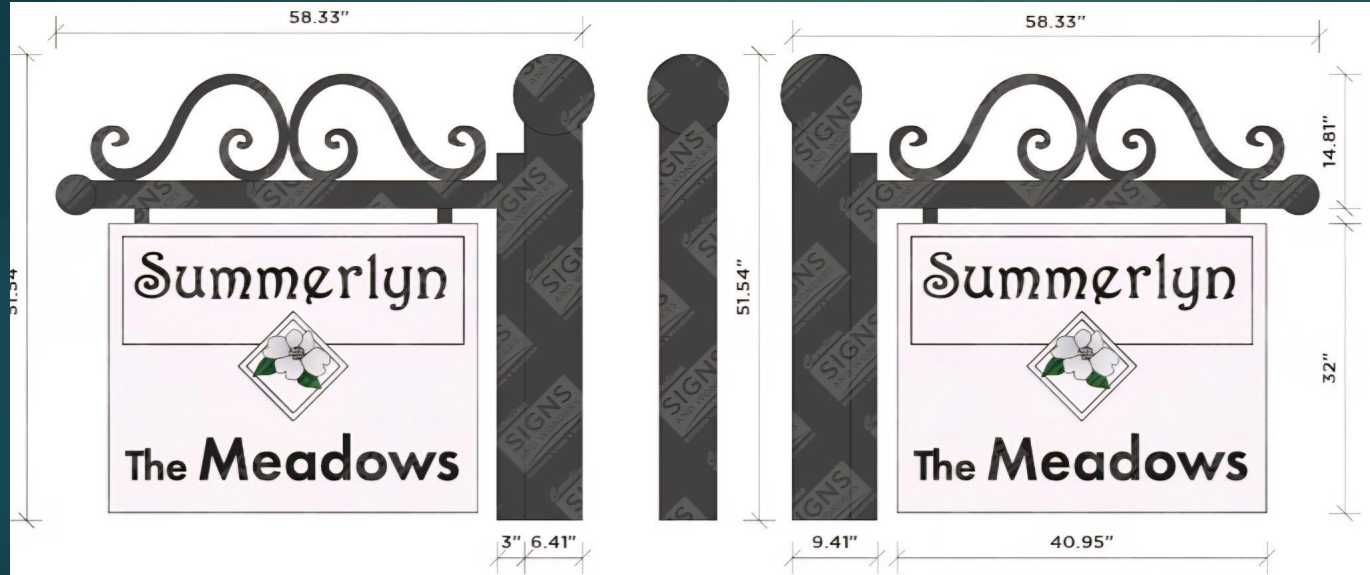
- ▶ Seal trail in 2026
- ▶ New Asphalt in pool parking lot in 2026
- ▶ Deep trim of wood line along Greenway in 2027
- ▶ New three entrance signs in 2026 - 2027



Entrance Sign Condition



Entrance signs



Quoting is approximately \$6,000 to \$9,000 (depending on material) for all 3 signs.

2026 - 2027 project

Board Membership Voting

Board of
Directors -
Openings

Sonya McLean - 1 year

Paul Rosales - 1 year

Greg Forde - 2 years

Crystal Dale - 2 years

Walter Serrano - 1 year

VACANT - 3 years

VACANT - 3 years



THANK YOU FOR
JOINING US!

QUESTIONS AND
COMMENTS

