

Special Meeting: Petition to the Summerstone Board of Directors: Request for Replacement of HOA Management Company

March 30th 2025, 2:17 PM

Agenda Item 1: Determine quorum

Agenda Item 2: Petition Notes from Attorney

Meeting Opening Notes From Attorney:

- Summarized the Petition
- Line by line addressing each item
- Addressed association initial response prior to receipt of signatures
- Petition contains a lot of misinformation, general items without support, along with false accusations that have been presented without factual information. The Board has to spend time on this, the Attorney had to spend time and host a special meeting when these matters could have been brought to the Board's attention but they were not. This Board works hard and responds to everything they receive. Further clarified, some of the items brought to Board were already addressed by Board or First and resolved.
- Provided rules for questions and guidelines

Line Item 1: Assertion that Karen Rodriguez managed community w/ out license.

Florida statute read, duties of a clerical assistant who conducts ministerial functions clarified, and differentiated from that of community manager. Attorney distinguished the difference, and stated Karen performed duties under Michelle (FIPM Owner), and that Karen, performed the duties she was allowed to perform. Attorney also corrected the dates as the dates provided in Petition were incorrect.

Further clarified, Karen performed activities that did not require a license.

Attorney stated there have been assertions and speculations that Nicole Rodriguez is related to Karen Rodriguez, this was spread door by door during the Petition. There is no relationship, they are not related. This is inaccurate. There is zero relationship.

Line Item 2: Failed to upload statutory documents and did not provide requested financial documents within 10-day period

Prior management, Access, did not provide the records as required by statute, and we are still fighting for documents. A Demand letter is going out this week.

As of Nov 14, 2024 First In Property Management posted all documents to the website.

Attorney clarified the failure to provide documents in a 10-day period for an official record request must be done by certified mail with return receipt requested. He clarified the statute further. Stated the Association and First have always attempted to provide to Owners, upon request, documents via email.

The documents would have had to be requested by certified mail to create a presumption that there was a failure to provide official records.

Clarified documents are on the website, as stated many times, and per statute.

Association does not have to provide or respond to email requests from statutory standpoint, but has done so as a courtesy.

Line Item 3: Failure to Prepare Audited Financial Statements

Association's prior management, Access, did not turn over records within 20 days of termination, and failed to provide/do the 2023 audit for which they were responsible. This delayed the Association's ability to prepare the audits. It is complete to our knowledge, and the 2024 audit engagement letter was signed by the President to begin.

Line Item 4 : Issuance of Unlawful Violation Notices & Harassment of Residents, Social Media Violations

The 2024 bill (trash cans, etc.) that addresses associations does NOT apply to this/our association.

Our Declaration was adopted in July of 2020, therefore 2024 law does not apply to this association.

Parking of commercial vehicles - does not apply to this association. Declaration must be followed.

Content on 3rd party FB group - this issue was resolved fully in July 2024. Social media provision of declaration, and application to owners' private issues was resolved and violation was removed. First Property Management met with the owners of the Facebook Group and resolved this, and an email blast was sent advising the community.

The Board still has serious concerns about false unofficial information posted on social media, and is looking into it further.

Only information found on the official community web page can be relied on for accuracy

Line Item 5: failure to maintain common area

This is a general statement. Once an issue is reported, vendors are contacted; neither the Board nor management has control over the vendor's schedule. It is no different for you as a homeowner... If you contact a vendor, you have to go by their schedule. Many times we have a contract with a vendor, and have to stick with that vendor and abide by their schedule. Whereas as an individual, you can call 10 plumbers to get someone out today.

With regard to these specific allegations:

Amenity center pool gate, Attorney clarified the pool closure on 6/13 by Dept of Health was reopened on 6/18 because of the temporary lock placed by the Association President. On 6/25 the gate was repaired by the vendor, Cable Now. It was then broken by community members again immediately after, and the lock was then placed on it again to avoid continuous (unbudgeted) repair expenses.

Next asserted failure was the post-hurricane cleanup:

The 3-week clean-up deadline is for government entities NOT private entities like HOA communities.

We must understand, vendor supplies are/were in short supply, vendors schedules were backed up for weeks/months, and after 2 hurricanes, we are at the mercy of vendors schedule, parts, and priority.

Also, some repairs were done by homeowners, which further caused unnecessary expense to the Association. The landscaping company performed a post-storm assessment of the entire community. These unauthorized repairs further created issues as trees that were attempted to be straightened by homeowners resulted in 4 underground drip line leaks, causing a total of \$250 un-budgeted funds.

Landscaping damage was extensive, is not an insurable item, and takes time to complete storm repairs when it is not budgeted.

Street Signs: We requested the deposit back from the sign repair company. After completing an on-site inspection, and collecting the deposit, weeks/months later after many follow-ups and additional visit, they then stated the job was outside their scope/capability.

Other communities nearby have the same issues with signs down

Person blurted out - we don't live there, we live in Summerstone...

The insurance claim was filed timely, from that point we are at the mercy of the insurance companies, the insurance adjuster, the contractors, and the materials. Additionally, street signs are not covered by insurance.

Line Item 6: Severe Safety Hazards

A 21-inch hole left unaddressed for months.

This was only brought to the HOA's attention on this petition.

Upon further diligence, a hole did show up on the engineer's study, and we are addressing it with the developer. However, the location of the hole on the petition is not specified. The one we know of is not on HOA or CDD property. It is on Pasco County property. We are in the process of contacting the county to address

Next, water leaks were ignored on several occasions.... where were the leaks? When? who were they reported to? These are general allegations with no facts. Once maintenance issues are reported, we contact vendors, we have no control over scheduling.

If you are referring to the townhomes, FIRST was involved, but again, no specifics are included in this Petition, or where it was. But I (lawyer) was personally involved, and it was resolved.

Services, this is another example of a general allegation unsupported by no facts. The Association is in contract for a specific schedule. There are no facts here, and without wasting more of the Association's money, owners' money, we have no details here

Updates are sent to the community regularly, ex: mulch updates were just sent.

Line Item 7: Breach of Contractual Obligations - failure to provide financial transparency

Prior management company did not turn over records within 20 days, everything First has was posted on the website by Nov 14, 2024.

Demand letter is going out to Access.

As it relates to official records, requests must be made by certified mail with return receipt in order for it to be a failure.

We have received record requests via email, and have to the extent we can, provided. Now official records are on the website per statute.

Line Item 8: Fail to perform audit

2023 was supposed to be done by Access, it was their responsibility. The Association did it for Access (additional expense) and are now working on 2024.

Line Item 9:

Another example of a general allegation with no facts. We have contracts with vendors on a schedule. And without specifics, we do not know and cannot address this.

Line Item 10: Failed to get competitive bids

Competitive bids are not required except if a contract for the purchase, lease, or renting of materials or equipment, or for the provision of services, requires payment by the association that exceeds 10 percent of the total annual budget of the association, including reserves, the association must obtain and hold for one year, competitive bids for the materials, equipment, or services.

Payment by the Association that exceeds 10% must then obtain competitive bids.

10% would be approximately \$85,000 for a contract.

The Association is in compliance with all statutory requirements

Line Item 11: Did not provide appropriate vacancies

Factual Misstatement - this only applies to elections. According to the Bylaws, the remaining board members APPOINT their replacement.

Line Item 12: Not specifics, general allegations, emails were sent by a courtesy.

Line Item 13: Failure to conduct community inspections

General allegations have no specifics or factual information. No info is included on when they were supposed to be performed and what was not performed.

General Response- Board was aware that inspections were paused in October, due to a family crisis with a family at First in late 2024. The board along with ARC members took it upon themselves to perform the inspections during this time while the employee of First resolved their family crisis

Line Item 14 : By Laws of CCR assertion that Board did not announce a vacant seat.

This ONLY applies to an election.

The Statue listed for support does not apply here.

Line Item 15 : Incompetent, lack of transparency

This is general in nature and does not provide any factual support, there needs to be specific dates and times.

This is another attempt to cast a bad vibe over First and the Board... There are no sufficient documents, no facts to support.

Question 1: Do we need an attorney to answer our questions, this is not a legal matter, this is a Petition, and you just read responses, you expected all of us to process this that quickly?

Answer 1: The reason I am here is because the Petition states Florida Statutes, and speaks to governing documents that do not apply to what they are being asserted to. The Board is not going to practice law, they are not attorneys. If you want to submit more questions after you can, if you have a concern you can email me.

Question 1 Continued: Reiterated you talked for 45 minutes and you expect us to understand?

Answer 1 Continued : I will discuss with the Board and we will work on responses

Question 2 : We want to replace the management company. Why are we here? Why aren't we just replacing them?

Answer 2: The Petition was submitted. The Petition contained allegations, the Board called me to defend against unfair and inaccurate accusations. Things are being cited that do not even apply. The Board simply could not have responded line by line and just taken a vote. Instead, in an effort to be transparent, the Board is going line by line and has me addressing each and every allegation. Board did this to respond true, accurate, legally, and transparently to each item on the Petition.

Statement From Community Member: The Board is working for the management company and not the community.

Question 3: I want the management company to be replaced. We want to get rid of Access. We petition for a change, you say these are general allegations. We don't want you, we want you replaced. We want to get rid of ACCESS, Get rid of Access.

Answer 3: No response provided.

Question 4: I am going to go against the status quo. Thank you to the board members. All of this is new for everyone, there is a lot we do not know, and we are all trying to understand.

Speaker interrupted by booing, loud screaming

Question 4 Continued: We all are a community, and we need to act as one. The reason the Attorney read the Petition is because a lot of people signed it. So he is going line by line so we can understand. Thank you, this cannot be easy.

Speaker interrupted by booing, loud screaming

Question 4 Continued: My question is can we all just be a community

Board returns back to Question 3, Why can't we get rid of ACCESS MANAGEMENT?

We got rid of Access last year. There is a lot of misunderstanding about how things work. I had only 1 person email us to clarify questions. Only 1 person emailed to ask questions to actually understand what is going on....

Answer 4:

Question 5: Who is responsible for taking care of the outside of townhome, HOA or the owner (roof, ground, lawn)? Sales lady told me the HOA was responsible.

Answer 5: Exterior maintenance within the lot line except to the extent provided in the declaration, is the townhome owner responsibility.

Yes, the townhome owner is responsible for the roof, it is a party roof, similar to a party wall, it is the homeowner responsibility.

Sales people represent the Developer and DR Horton and are only making sales, that is why Florida law requires you get a copy of the documents prior to signing.

Question 6: Do you (attorney) represent First in Prop or any other communities they manage?

Have you had prior business with First prior to our community?

Why are we doing this? Over half the community wants a new management company, why are you fighting so hard?

Answer 6: I'm hired with many other communities, and other communities managed by First.

Nicole: Can you help us understand what we are doing to "fight hard" to keep First?

Question 6 Responds: All of this!!

Nicole: Help me understand, by responding to the Petition with a meeting to answer the questions, we are "fighting to keep First"

Community Screaming, Unable to understand

Answer 6 Continued:

The Board wanted me to go line by line, because I believe there has been a lot of finger-pointing without clear understanding.

Question 6 Continued:

Why are you fighting so hard? We want a new company, over half the community wants a new company, we should just get one. When you fight so hard against it, it looks shady.

Answer from Korey: There is nothing in this for us, number 1.

The over 50% threshold to put something on a Petition does not mean anything. What we are hearing is that when we give updates/accurate answers to the Community, they are pushed to the side as false.

Community Members Screaming and Interrupting

Question 6 Continued:

We will not be a community as long as we have First.

Answer 6 Continued:

There are allegations and accusations that are being thrown at the Board and at least 90% are factually inaccurate.

They asked me to come here to point out where there are factual inconsistencies.

No one here has any financial gain.

Why do you want First to be the management company so bad?

Community Members Screaming and Interrupting

Question 7: Karen was introduced as manager. The election was not done correctly. The community is not in good condition. This is backed by factual evidence, since First in Property took over, we have asked the Board multiple times. I have an email from Nicole on July 11th, saying she will get back with me. They have an inactive corporation.

Answer 7: All this was unfounded

Question 8: Nicole does not even live in Summerstone and should be removed immediately.

****Community Members screaming****

****Community Members making allegations****

****Community Member interjects and takes time from another Community Member. Attorney reiterates Community Members cannot share time.****

****Community Member continues anyway****

Answer 8:

Question 9: The HOA should be representing us right? Who are you representing us or the Board? The last 2 year audit, where are they? 2024 audit is where? The financial information is it confidential? Who are other potential HOA management companies?

Answer 9: Please stop the shout outs. I have been representing the Board for over a year. The 2023 audit was complete and should be on the website soon. 2024 will be complete in April. The Board is addressing the Petition and I am unsure of other companies at this time.

Question 10: You are doing a lot of work. Do you as an attorney work for the Board or Summerstone? So my questions is, why is Nicole on the Board, if she does not live in the community? Who is he, how did he get here? Are you willing to work with us? You work for us, what can we do to remove the Board, what can we do to have a new election and remove all Board members, we thought you were willing to work with us.

****Community Members screaming****

****Community Members making allegations****

Answer 10: I work for the association, retained by the Board. You only have to be an owner of a lot. Bob is here because someone who is not a homeowner put on his application that he was a homeowner. We board/management) sent several emails to him, there was no response. We looked for another email and found out he is not an owner. Therefore we removed the elected homeowner and appointed Bob because he offered to help and assist the HOA in any way at a much earlier time.

Attorney: By statute there are actions homeowners can seek to remove the Board. We do work with everyone here, we are doing what we can. The Board is trying to be as transparent as possible, and look at the backlash towards this Board for going line by line when there are factual and inaccurate info being shared by/within the community...Here is what was asserted and here is what the Board thinks.

When we try we have people screaming and yelling at the Board. We send email blasts to resolve these issues, and now these same things are re-circulating on a Petition.

Question 11: How many times did the software change? Have you personally visited the community, attorney? Why was a food truck given months in advance, but Board meetings announced only days in advance. Why are you changing Rent Manager?

Interruption from community member: from January to March there have been 3 changes.

Answer 11: Specifics of the financial audit. No, I have not visited the community. Board meetings must be announced 48 hours in advance and are decided around availability. Other items like food trucks are announced when known. I do not know of any changes to Rent Manager.

Financials were not specific in the petition, there were no specifics

Community Member: I want to show you the documents

Attorney: email the questions to the Board.

Community Member: we have brought things to the community multiple times, and have no response. I emailed Nicole in July.

Back to original question: why was the board member removed and Bob placed

Attorney: He represented himself as a homeowner, once we found out he was ineligible to be elected, then the Board replaced him.

****Community Members screaming****

****Community Members making allegations****

Question 12: I want to get to the bottom of these things, we are X thousand in debt, yet we have a lawyer here. It shows your focus. We have problems, there have been no audits, and worse the Board never communicated these delays, you never communicated the problems with the previous management company, and the Board failed in communication and transparency, Board has bad vendors that are constantly failing. Financial audit was not done, and you are responsible for communicating, these are violations of the state law. We have a valid petition to remove the Board with 51% signatures and you still refuse.

Answer 12: The Petition was not to remove Board Members it was to remove the management company.. There is misinformation being spread everywhere and you are clearly citing my exact points about misinformation.

Question 12 Continued: A forensic audit must take place and any financial misconduct or embezzlement, we will have you all prosecuted.

****Community Members screaming****

****Community Members making allegations****

Question 13: Is the HOA all homeowners? Do we have a right to decide how that money is spent? Isn't it a fact that half of the association wanting the management company changed enough? If it is our money it should be our decision. You choose a Muslim Sunday and holiday for this meeting this *unable to understand fully*

Answer 13: You have a right to vote for Board Members. The Board has to have a meeting for the Petition, that was the process pursued and that is what we are doing. Just because 51% of the community wants to change it, it is still up to the Board. The corporate entity is controlled by the Board, from a legal standard the Board does not have to do that.

I understand there is concern of discriminatory choosing for the date, there was no discussion on it being a holiday. This is the latest date we could do based on availability. The Board did not do this for any ulterior reason.

Question 14: Current state of the community is not good. I send emails, nothing happens, send emails about grass on Lotus Flower. Are you going to change the management company or not?

Answer 14: The debris you are speaking of at the dead end, we are trying to make it so the developer pays for it. We will answer questions on the management company after

Question 15: There is a lot of confusion .

HOA is separate from First in Property Management/ Who we pay are dues to are different than the Board.

You are trying to eliminate our management company, Access mismanaged everything. We voted on this Board and these people volunteered and stepped in and voluntarily took their time and took many hours to represent us and to fix what Access mismanaged

****Community Members screaming****

****Community Members making allegations****

Interruptions: ACCESS didn't do anything wrong

Question 15 Continued:

Is there any family relationship between a Board member, and the management company, First?

Attorney confirmed there is no relationship.

Attorney: Access stopped managing the relationship months before contract was ended, they stopped paying bills months before, ex: there was townhome water bill late fees of over \$10K, they failed to file an audit, failed to pay insurance and other vendors, and the Board was notified 1 day before services cutoff.

It has been rumored through the community that this board is taking kickbacks. They are taking nothing! Based on this accusation, I was provided an email confirming the food truck is not providing kickbacks to the Board.

The Board is here serving yet being accused of taking kickbacks, they are here serving as volunteers, they take a ton of time, maybe some of you should consider running. Accusations are being sprawled out at them. I have written confirmation that the Board is not receiving any kickbacks or monetary gains of any kind.

Question 16: I want to say yes we are a community, I have never said anything about any board members. You will never hear me speak ill of anyone, I can see how people think they are taking kickbacks because there are supposed to be documents and there are not, so I can understand how people think there are kickbacks involved because I just requested invoices and receipts, and I do not have a response. So that is why we think there is something going on behind the scenes.

Answer 16: Depending on the volume of emails they try to respond to everything timely. I know there have been owners going to inspect in person. Everything that is available should be posted online at this time.

Question 16 continued: The documents are not on the Portal.

Answer 16: That is all wrong. Documents are not on the portal; they are on the Summerstone website as of November, and has been communicated numerous times. That is where the documents are, they are not on the portal. We are a private corporation, not public, there is a folder with a password protected link and you can ask for the password. The statutes dictate which documents can be public and which should be protected.

You have to submit a request.

Question 16 Responds: That was not told to us

Community Members Blurt Out: THERE WERE EMAILS

Community Members Screaming

Community Members blurting out accusations

Question 17: On the management company topic...it seems we want the company changed, can it be done? Is there a specific time they can be changed?

Answer 17: I believe it is 60 days prior to April 1st. 60-day notice would have to have been provided, it would cost \$10,400, and any transition fees. We got rid of Access for cause and we cancelled prior to their cancellation period to avoid cancellation costs.

Question 17: I want to reiterate... to get a new company, we as homeowners have to pay \$10k plus transition fees to a new company!

My next question, are we trying to replace First the management company or the HOA? With all the accusations going around, not everyone was presented with this petition, no one came to my door! As far as First, based on what was on Petition I feel the questions were all answered. So why do people still want to replace them? The reasons were addressed line by line, do we get to vote on the cost to change and decide? We got this auditorium so everyone could be here. We need FULL COMMUNITY VOTE BASED ON FEES.

Attorney: It is an Agenda item for the Board to decide.

My next question: You are here because there are statutes and legal aspects that required you to be here, correct?

Attorney - because the Petition cites law, and the Board cannot practice law, yes.

I am not here against the community. I am here to respond to the petition to address all items presented.

Community Members Screaming

Community Members blurting out accusations

Question 17: It seems like the homeowners are here against this..How much is this going to cost? I think you said most of these responses was already sent in emails, and you said the Petition was sent by the Community to you directly? So that is why you're here.

Attorney: Yes.

Question 18: Very stressful what is happening and it is sad, every homeowner represents the community, as well as our Board. They inherited a bad situation from Access, we still do not have all our records ,they have been fighting for us. But I hope we work collectively to a path forward to live in harmony. What happens with a new management company and the same things happens. I hope we can work together to live in peace and harmony

Question 19: How much have you received from our budget, how much have you been paid to represent first in property management ? How much of our budget? All communities have a lawyer who works on flat fee, you were hired by First & prop?

Obviously I know the board will not listen. Our community looks like section 8. I want to see service for our money. How many votes do we need to remove the Board?

Answer 19: I do not represent First. I represent Summerstone Association at \$300 an hour, if I had to guess I am at about \$2500 Again, I was not hired by First.

In 23 years working with associations in Manatee, Hillsborough, Pasco, etc. and I have never seen an attorney on a flat fee. It is not even ethical.

I do not have the statute memorized. I will look

Community member: *SCREAMING*

Why didn't the board respond back with questions to our Petition instead the Board responded with a meeting. If the Board just answered it would not cost us 10 thousand plus to change board. They (First) breached the contract so we should be able to cancel.

Community member:

Are we expecting the election this Summer?

Answer: The President seat is up at the next annual meeting.

Question 20: Are you guys coming up with your own rules or are you following the community rules, and declaration ? Will the the next person up have to do the same?

Answer 20 : Following all the community documents, they will have to (must) do the same

Question 21: How can you be against the homeowners? You need to find a solution. How come you are working hard to make this not happen?

Question 22: If there is a breach, an escalation or concern I can reach the vendors directly.

Why are trees still down?

Community Members Screaming

Community Members blurting out accusations

Answer 22: Because landscaping is not insurable, we have to use the funds that were in the budget. There is a shortage of materials and tools in the region that is outside of our control, everything is done based on vendor availability and budget.

Question 23: I appreciate you going line by line. The cost to change management would be over \$10,000. If we changed companies would there be a difficulty in losing momentum in our repercussions against Access? Is there a risk assessment taking place? Letter is going out this week?

Answer 23: We need to do a risk assessment once we get a response back from Access. They voluntarily spoke on reimbursing at least 1 month of management fees (but that was just verbal). Yes it goes back this week.

Community Members Screaming

Community Members blurting out accusations

Community Member Blurts Out : There is a balance of negative \$100,000 what is another \$10,000???

Attorney Responds: The numbers on the budget are an estimate and they fluctuate; they are balanced at the end of the year. It can change and/or level out.

Question 23 Continued: It is very stressful and upsetting to see people argue over these issues.. my ask is that everyone here understands.. This Board is a volunteer board, this is a big job, it is stressful and it is sad how they are treated.

Question 24: We have two issues, and a lot of issues, to everyone's position we have concerns with the Board and the Management. What is causing the delays?

Example the pool gate on the North side has a lock.

Korey Board Response: I put it there because the fence was repaired, then the lock was repaired, it was then broken two more times after. I have been up there multiple times. The current (pre-existing) company is Cable Now. They charge \$200 plus per site visit, then to obtain parts, then come back and charge for repair. The security company we are looking into is a huge decision, it is about a 5 or 10-year or longer term decision, with a lot to consider for a

contract. We cannot rush that. Further, we are not bandaiding these issues instead we are looking at the developer and what was done incorrectly. It turns out, the mechanisms and system we currently have is not equipped for this type of outdoor use, and that is why the Engineer Report was conducted (things like this), to go back on the Developer.

Street signs...we have been engaged with multiple times- I rode personally with Fast Signs, they were contracted, months later, they said they cannot do the work, so we fired them and demanded the deposit return.

I am in a group with Board members from 70+ other communities around us and they are experiencing the same issues.

Question 24 Continued: Our biggest concern is financial

Question 24 Answer: We have emails with the CPA, the 2023 audit is done, 2024 will be done by April, specifics you can request.

Question 25: What is your perspective of the community?

Answer 25: Overall First in Prop Management is way better than Access Management

I think they are doing great, I think there is just a lot of confusion.

We had many hard, proven issues with Access, and so we got rid of them.

We don't have an issue with First. If we had issues, we would take care of/remove them, just like we did with Access.

We send out frequent updates...People are saying they don't believe our updates and even call them lies.

We just acquired a General Contractor resource. At first, they didn't want to work for us/the community because they still thought we were with Access, as our community was black listed because Access still owed them money.

People are mad and it is a huge misunderstanding. People are mad at DR Horton because of what they were told by Access or vice versa, and otherwise.

Question 25 Continued: There is a huge disconnect between the community and the Board.. What are you, as the President, going to do to fix that fracture?

Answer 25 Continued: One of the immediate fixes was this venue, and meeting... It was to host this in the interest of transparency to fix the misunderstanding. Updates are sent, email's always available.

Community Members Screaming

Question 25 Continued: This does not fix the fracture.

Question 26: Nicole and Korey you have been very pleasant thank you. Access sucked. Why are my fees going up by 33%. I want to know where my money is going. You stated that you are not going with companies that are the most affordable. Why after all of this time are you still going in circles with companies that do not respond. The finances are important, and we are angry because we do not have that.

Answer 26: I signed the 2024 audit engagement letter with a completely independent, third party

Regarding vendors- All of our current vendors respond very quickly. We call or email, they answer or get back to us rapidly. We are talking possibly \$20-\$40 thousand to change the security system and that amount is not in the budget. One of the things other communities do have that we do not, because of community age, is a reserve study done yet (it's in the budget this year to do one), so that we can build necessary reserves. We had a pool attendant in the budget, rocks are constantly thrown in the pool over and over, now we have to use more money for those additional cleanings and a pricy pump repair, for example. We put money in the budget. Our ponds are eroding, we have 1 quote of \$38 thousand and we added it to the budget, we have the normal increase of insurance, the pool attendant funds we moved to miscellaneous funds and hopefully we can hopefully buffer with that. It takes time to build that money for those and other budget items, we are only 3 months into this year's budget. It takes time to build the funds to do all things planned.

Attorney Answer 26: Some people unfortunately don't pay dues. When I started working with the Association they were using an outside company for collections and the performance was poor. I am now doing late dues, and I have already got payment on many.

Question 26 Continued: Are you taking legal action against access management?

Attorney Answer 26: We are sending out a legal demand letter

Question 26 Continued: Why has it taken so long?

Attorney Answer 26: There have been many other issues that needed to be addressed, and it took time to collect the supporting documents, we needed to get ledgers and items for the 2023 audit. The association did hire engineers to do a turnover review, and we wanted to understand items that were lack of maintenance vs developer/management issues.

Question 26 Continued: Are you going to look for more vendors soon that are more responsive or more affordable?

Board Answer 26: We always send emails asking for recommendations. Some responded in the community, and we have someone from the community quoting/hoping for future janitorial. No one is stopping anyone from sending in who they know. We are not against changing companies, if they align with our community's needs/requirements. Insurance, we are working with someone in the community who is an Agent, they came in high, or couldn't currently match coverages, so we couldn't do it, but they will be inquired to about a quote for next year as the strong relationship was built and it's our belief that we should utilize those in our community first, if possible.

Question 26 Continued: The community wants a new manager and I think we should honor that...Will the dues go up in the future?

Board Answer 26 Continued:We do not know. It depends on how the year goes, Insurance only covers certain things, etc.

Question 27: The soffit was repaired. It looks terrible, why does it look like that ?

Community Members Screaming

Answer 27: We did object to it. The company (documented it) is looking for a better match and will replace it if/when they find a better match.

Question 28: For those that did not sign the Petition, are we responsible for the fees?

Answer 28: yes, community wide

Question 29: We have seen a lot of change of vendors that causes a lot of confusion.

Answer 29: No recent vendor changes. The landscaping company changed their name, the company was not changed.

Question 30: How many 2024 legal fees, how much was budgeted? But the actual was \$20K + from June to December. Does the property management company manage other companies?

Answer 30: 2024 Budget was prepared by Access. If the actuals was \$20K then that is what it was. I assisted the Board with day-to-day activities, getting transitioned from Access, Attorneys fees towards collection efforts those get re-paid, thats general, and off the top of my head. To the extent that are not attorney client privilege they are available.

First in Property Management was hired in April 2024, I have associations managed by First 3+ 4 years prior.

Community Member: They do not manage associations they manage single family homes-

Attorney: No, that is not correct. I manage at least 3. I have been with 1 for several years.

Question 31: We are charged to process our dues monthly. According to FL law there should be one option for free.

Attorney Answer 31: First has an online payment system, and I am not aware of any law pertaining to a free option. If you mail them a check, they will not return the check. They have a physical office address, you can mail it there.

Question 31 Continued: **Could not understand speaker**

Everything that is outstanding is from First.

Community Members screaming

Answer 31 Continued: We have spoken to First, and we still have not found one that is free. From what we heard and what we know,

The payment coupons are not free, they are thousands of dollars on the budget, plus processing. If you are paying at the time of payment or paying for the coupon book (absorbed into the dues), you are still paying. If you want to pay your whole year, if you can, you can do that currently with a single transaction fee. If we go to coupon books, then ALL the home owners have to pay for the coupon book. Either way, there are currently costs associated.

Community Screaming

Attorney: I am calling time. Florida law provides 3 minutes per person,

31 Continued: I am not stopping

Community screaming

31 Continued: I went online and there are no records in the portal.

Community screaming

Community Member: I have all the records, why do you not have all the records.

Community Members make statements about missing financials, and financials not in portal.

Attorney: We will look into it (again not on portal but website). Access did not provide the support to the Board or provide the financials, the official records in full were not turned over in full, if you had them, I cannot speak to that.

Question 32: Our intentions were to show we are not into First, and they are not what we are looking for. My one question is, who does the budget preparation? When is the official nomination of First? We would like to receive that information...you said you were hired today to represent the Board? Why did you say, I do everything for our community, I volunteer, but you did work in First in Property Management?

Unable to Understand.

Community Screaming

You are wasting our money. Our only intention was to talk. Now we are paying for a lawyer, you told us I am going to hire a lawyer with your money, and it is going to increase your monthly payment, why when it is so simple. Lawyer you are here doing your job, and getting paid and since you are here. But the problem is not First, the problem is the Board .

Unable to Understand.

Community Screaming

We call for light poles that are down. They do not come and fix the light poles. Why??

Unable to Understand.

Community Screaming

That makes me think this is not a First issue, this is a Board issue, and I am asking you to step down.

Answer 32: No one has any affiliation with First in Property Management

Korey reads resignation (effective immediately upon meeting adjournment):

Dear Nicole, Bob, and Summerstone Homeowners,
It is with a heavy heart that I write this letter, my resignation and final action, as the President of the Summerstone Homeowners Association Board of Directors, effective immediately. Events spanning the last few months, including recent harassment, false allegations and/or personal character attacks directed my way, along with private and unfortunate medical reasons, have made it untenable for me to continue in this specific role. After the last board meeting adjourned, it was stated, among other things very aggressively, that the community should overthrow the board into a receivership, we were accused of receiving kickbacks from First and food trucks, and that I need to do more...be more available. I don't know how to do that any further than I already have, as a volunteer, while receiving such negativity.

During my tenure, my primary focus has always been the stability and betterment of our community while assisting everyone to the greatest extent possible. Despite my efforts and dedication, the current environment has become increasingly hostile while creating distractions, which greatly reduced my available time from what I should be focused on, undermining and preventing my ability to serve in a most effective, leaning forward approach. I believe that stepping down is in the best interest of myself, the community, and most importantly, my family...as I don't see it stopping.

I am and will always be grateful for the opportunity to have served you, and for your support, especially of those who have, and still do believe/trust, in my leadership. I sincerely wish the best to those who volunteer to serve in an HOA board member capacity after this resignation, to continue to move our community forward with patience and in a constructive, logical, per documents, and overall positive manner for the benefit of all homeowners and residents.

Thank you for your understanding, I'll see you all around the community.

Attorney: We will announce another Board meeting in just a few weeks, and then Nicole and Bob will be resigning over the next few weeks, we will hold consecutive board meetings for the replacements to be appointed. First in Property Management will be emailing intents to be considered for Board appointments, I have papers intent forms here.

Question 33: Will there be an election?

Attorney Answer 33: No. Intent forms for appointment consideration will go out to all homeowners.

Motion to Replace First in Property Management:

I hope volunteers step up. The last thing we need is a receivership. I ask that volunteers to step up so we do not lose the traction, you have a few more weeks, $\frac{2}{3}$ vote gets things done.

To conclude, Motion to keep First in Property Management:

Korey Vote: Yes

Nicole Vote: I want to take a moment to clarify and make things very clear. We as a Board are all resigning. Changing property management companies is going to cost the community well over \$10,000. I am not going to make the decision to cost the Association additional money when another Board will be taking over. They can review everything and make the best decision for the community. Therefore, I vote yes.

Bob Vote: Yes for the same reasons

Meeting adjourned at 5:55 PM