

THE LEGACY AT JORDAN LAKE

Monthly Secretary's Report



WELCOME FALL!

By Jen Cox, HOA Board of Directors, Secretary

Fall is here! Hopefully, you and your family are enjoying the cooler weather, the autumn colors, and the fun activities this time of year in North Carolina.

This issue combines updates from September and October. There will be one more issue this calendar year that will combine November and December. Over the next several weeks there will be communications to homeowners regarding ongoing repair projects, financials, HOA operations, and the Annual Meeting. Please ensure you have access to the Resident Portal (aka Frontsteps) for ongoing updates and access to HOA documents. You may access the Portal (or register) via the Legacy at Jordan Lake page on CAS' website. [Legacy at Jordan Lake - Community Association Services, Inc.](#) This reminder was in August's newsletter, **but please sign up for Portal access to stay informed about the community.**

WHAT'S NEW

GATE ACCESS

CAS mailed each household a unique access code to use at the call box several weeks ago. If you did not receive the mailing, please email legacyjl@casnc.com. Any previous codes were deactivated and will not work at the gates!

In September's Board meeting the Board moved to adjust the gate hours from 8:00 PM to 7:00 AM.

This one-hour time change from 7:00 PM to 8:00 PM was recommended by the security company to minimize gate wear & tear from high volume traffic.

PRESIDENT'S UPDATE

By Kory McLellan

Over the course of this year, we have experienced multiple issues with our current landscape vendor, including inconsistent mowing, inadequate weed treatment, and insufficient pruning of shrubs and trees. Despite numerous communications and even a sit-down meeting with their supervisors, the problems persisted. Ultimately, we had to withhold payment to ensure that the standard contracted work was completed.

Given these ongoing challenges, the Board agreed that The Legacy deserves and requires a higher standard of landscape management and service. After discussions with Sun Valley, we determined that they are well-positioned to take over the landscape maintenance contract starting in 2026. We believe Sun Valley will provide a more consistent level of service, improved oversight, and greater attention to detail moving forward.

Landscape Improvements

In the 2026 budget, the Board has allocated \$21,000 for landscape improvements. These funds will support several key projects, including landscaping around the waterfall area following its restoration and necessary code compliance work.

The allocation also covers top dressing for the parks located on Two Creeks Loop and North Crest. Over the past two summers, the Bermuda grass in these areas has struggled to fill in bare spots. Applying a top-dressing blend of 70% compost and 30% sand will provide essential nutrients and improved soil structure, promoting healthier turf growth. In addition, a lime amendment will be applied to further enhance soil conditions.

Lastly, the remaining sections of the devil strip along Legacy Club Drive that are currently fescue or bare will be replaced with Bermuda grass. This change will create a more uniform and aesthetically pleasing appearance, as fescue tends to become heat-stressed and die back during the summer months.

Overall, these planned improvements are part of our ongoing effort to elevate the community's landscaping to the high standard that The Legacy deserves.

GROUNDS COMMITTEE

By Kory McLellan, Board Liaison



The natural bridge on the golf course near hole #1 was installed and is ready for use.

During the most recent Board meeting, the Board voted to approve the removal of the Red Maples along the golf course on Legacy Club Drive and portions of Legacy Falls Drive South, as well as the installation of 8 Black Tupelos and 12 Redbuds, arranged in groups of two Tupelos and three Redbuds.

This project has been long overdue, as the existing Red Maples are in poor health and declining condition. Both the Black Tupelo and Redbud are native species that are better suited to the soil and climate conditions along the golf course.

The original quote from Bland Landscaping for this work was \$21,000. However, after obtaining a new proposal from Sun Valley, we were able to secure a significantly reduced cost of \$7,080, which was approved by the Board during

October's Board meeting. Installation is expected to take place in December.

SETTLEMENT UPDATES

The County deeded over the remaining SCMs to The Legacy HOA albeit concerns expressed by the Board regarding some of the pond's conditions. During the mowing of the SCMs that were recently turned over, Foster's discovered a sinkhole forming on the SCM behind the High Woods Ridge area. They believe this is due to the outlet pipe separating directly beneath it. The County was made aware of this issue. The Board is reviewing options for remediation.

In addition, the Association's legal counsel for the settlement agreement sent the cost estimates totaling nearly \$90,000 for repairing the roads in the three areas identified by the Association's engineer during the settlement agreement inspections. The Board is awaiting a response from Freehold's counsel. The roads will not be turned over to the Association until an agreement is reached.

As a reminder the terms of the settlement agreement with the Developer (i.e., Freehold) can be reviewed on the Resident Portal under Community Documents/Resident Resources/Developer Declarant Settlement Agreement/Freehold Agreement.

Getting to the terms of the settlement agreement, which achieved the forgiveness of the promissory loans, and then managing through the process of the settlement agreement has been a time-consuming process for multiple Board of Director tenures and CAS. Finalizing the terms of the agreement is a priority for the remainder of 2025.

Effluent Spray Field and NCDEQ Permit Update

With the existing effluent spray permit from the State expiring this year, Aqua applied for a new one. During the renewal process, the North Carolina Department of Environmental Quality (NCDEQ) recalculated the effluent spray fields based on those that were actually developed, rather than those originally proposed. This recalculation created a discrepancy compared to the original permit issued by the State.

As a result, the new permit limits Aqua to spraying 65,000 gallons per day, while they are currently receiving approximately 80,000 gallons per day in wastewater. To address this, Aqua will need to construct additional spray fields, which have already been approved by NCDEQ.

So far, two new fields have been signed for erosion control permits. An additional three spray fields are expected to be constructed on HOA property, though their design and erosion control plans are still under review and awaiting approval. Another spray field is also planned for Phase 7, which is land that the Developer sold to a private property owner.

Fortunately, the HOA will not be responsible for the cost of constructing or developing these new spray fields. However, we are responsible for maintaining and managing the vegetation within them. As noted previously, NCDEQ now requires that the fields be mowed eight times per year, up from the historical average of twice annually. This change has significantly increased our maintenance costs.

We anticipate having to maintain and mow approximately 5.6 additional acres beginning in summer 2026. Homeowners located near the new fields will be contacted directly before a community-wide announcement is made.

This requirement is the primary reason for the increase in the spray field maintenance budget for 2026, with an additional increase expected in 2027 to account for a full year of maintaining the new fields.

WATER BILL COST SAVING TIP!



With winter approaching and below-freezing temperatures on the way, please remember to winterize or remove your irrigation backflow preventers. This will help prevent them from freezing and breaking, which can result in costly water leaks.

Additionally, with TriRiver now serving as our water provider, they have implemented a second administrative fee associated with irrigation backflows. Once your irrigation system has been winterized and turned off, you can contact TriRiver Customer Support at 919-775-8215 to request that your irrigation account be placed in “vacancy” status. This will stop the additional administrative fee from being charged.

When spring arrives and you are ready to restart your irrigation system, simply call TriRiver again to reactivate the account.

Thank you for taking the time to prepare your systems and avoid any unnecessary repairs or charges.

TREASURER’S UPDATE

By Frank Perez and Rich St. Pierre

This week the *official* annual meeting notice for December 9th will be mailed. You will receive the *official* annual meeting packet via mail and email. The packet contains details regarding the annual meeting, candidate nominations, voting, and the 2026 annual budget, which references the 5-year financial plan.

The Board is pleased to provide a 5-Year Financial Plan for our community. The plan is an extension of the 2026 budget through 2030. The financial plan has entailed a careful review of historical line-by-line operating expenses, existing contracts and maintenance requirements as well as an extensive list of necessary reserve-funded capital expenditures. The recommended increase in homeowner monthly assessments is largely necessitated by a number of large capital projects such as the waterfall, clubhouse, and gatehouse restoration/repairs, and the repaving of select phase 1 roads during this 5-year period.

After an in-depth analysis of the community’s roads, we have established a very specific timeline for repaving each individual road. As a result, the HOA will be able to continue to carefully manage reserve expenses and stabilize assessments with a modest forecasted increase from 2026 to 2027 and basically an annual inflation adjustment thereafter.

It is this Board’s continued objective to address capital projects on a timely, cost-effective timeline thus reducing the need to borrow funds or collect special assessments. Most importantly, this approach will help protect our investment. You may access the report via Frontsteps: legacyatl.frontsteps.com -> Quick Actions -> Community Documents -> Resident Resources -> Financials -> 5-Year Plan (2026-2030).

With regards to the 2026 budget, additional information will be included in the annual meeting packet. However, as outlined in the 5-year financial plan the Legacy HOA monthly homeowner assessment will increase to \$250, effective January 1, 2026.

This increase is necessary to cover the increase in operational costs and adequately fund the reserve account as outlined in the Reserve Study and the five-year financial plan.

The following factors contribute to the dues increase for 2026:

- **Increased Reserve Fund Contribution:** The transfer to the reserve fund is rising from \$311,144 (2025) to \$366,778 (2026). This increase is necessary to fund upcoming projects outlined in the Association's 5-year financial plan and in this mailer, ensuring the community can cover future repairs and replacements. This includes the waterfall restoration.
- **Higher Grounds Maintenance Costs:** Grounds maintenance expenses are increasing, especially for:
 - *Pine straw/mulch:* All areas require mulching in 2026 (only half were done in 2025).
 - *Effluent spray fields:* The North Carolina Department of Environmental Quality (NCDEQ) now requires increasing the mowing frequency from twice a year to eight times a year. In addition, at least five new fields are scheduled to be added by mid-2026, as required by NCDEQ.
 - *Grounds Improvement:* \$21,000 is allocated for waterfall landscaping, top dressing parks, and sod replacement.
- **Insurance Premiums:** Insurance costs are budgeted to rise from \$27,077 (2025) to \$32,400 (2026), reflecting current market conditions.
- **Pool and Recreation Enhancements:** Increased pool expenses, including a new pool monitor to ensure compliance with County rules and higher costs for chemicals and repairs. The recreation budget includes more for playground repairs and fitness center equipment.
- **Administrative and Management Costs:** The management fee will remain at the level established by the full-time contract initiated in 2025. The Board is evaluating the option for a virtual gate guard to manage gate access calls with a security protocol for the hours of 8:00 PM to 7:00 AM. Since this has not been decided, the line item was left as a placeholder. Should the virtual gate guard not be implemented in 2026 the budget allocated will be transferred to the Reserve. Additional efforts will be directed toward property inspections, due to a higher number of lots not maintained in accordance with community standards. Legal and audit expenses are projected to return to typical levels following increased costs in 2025 that resulted from the ongoing settlement agreement process.

In summary, these budgetary adjustments are essential for maintaining the quality and safety of our community while planning responsibly for future needs. We appreciate your understanding and continued support as we work together to ensure Legacy HOA remains a vibrant and well-cared-for neighborhood.

CONSTRUCTION UPDATES



WATERFALL

Earlier this year, mechanical and structural engineers evaluated the community waterfall, and recommended hiring a hydraulic engineer for a comprehensive assessment. After reaching out to multiple firms, one hydraulic engineer completed their review in August. The findings and report were distributed to the community. The review determined that the waterfall's current condition

is primarily due to over ten years of insufficient maintenance. Additionally, the system, constructed nearly twenty years ago, does not meet current electrical and structural codes. The necessary repairs and restoration are significant.

The Board received two proposals: one for a full restoration of the waterfall at an estimated cost of \$600,000, and another to fill the pools with soil and landscaping at an estimated cost of \$400,000.

As outlined in the Q&A that was distributed to the community, over the past year, the Board has made extensive efforts to secure proposals for the waterfall. Six engineering firms in North Carolina were contacted and asked to inspect the feature and provide repair assessments with cost estimates. Unfortunately, all six declined. Two engineers initially expressed interest and performed an on-site inspection, but the project did not align with their scope of work. Their feedback included a high-level estimate in the range of \$750,000 to \$1 million and the recommendation to involve a hydraulic engineer as noted above. We engaged a highly regarded hydraulic engineer who completed a full inspection in August and prepared the detailed report that was later approved for contract. This firm brings extensive experience with water features both in the U.S. (Charlotte, Cary, Alabama) and internationally (Dubai, the Caribbean, and the Smithsonian). We also contacted five of their references, all of whom spoke very highly of their technical expertise, responsiveness, and long-term support. Of note, Watertronics ranks this engineer as their #1 provider within their network. One of the references included a community with a 20-year-old waterfall nearly identical to ours, which further validated the relevance of the vendor's experience.

Before the September Board meeting, an in-person Q&A session was held with homeowners, followed by an emailed Q&A and poll to the community. After removing duplicate entries and those without assigned street addresses, there were 246 eligible responses, representing 53% of neighborhood lots. Of these, forty-two households favored transforming the waterfall into a landscaping feature, while 204 preferred restoring the waterfall. Thus, 83% of poll participants supported restoration.

Based on expert recommendations, poll results, and discussions with previous Directors and community members, the Board voted to restore the waterfall. **The waterfall restoration is scheduled to begin the first week of November, starting with the pump and electrical systems in the pump house.**

CLUBHOUSE

Remediation efforts targeting items noted in the 2024 Transition Study, the 2017 County Inspection Cards, and detailed within the June Secretary's report commenced early October. The roofing work is near completion. The electrical and HVAC inspections took place the week of October 13. The findings will be shared when the reports are provided to the Board for review.

As background, the 2024 Transition Study, available on the Residents' Portal (i.e., Frontsteps), identified major repair needs for the clubhouse, including roof modifications, fixing metal flashing, replacing damaged shingles, and addressing trim and flashing issues to prevent further moisture intrusion. Previous code violations from 2017 concerning siding and flashing remained unresolved when Developer turned over the building to the Association. Seven vendors, the original builder, the Developer, the Association's insurance company, and legal counsel were consulted. None of the repairs are covered by insurance or warranty, and legal options are limited—the Association must cover all costs.



In fall 2024, the Fire Department responded to a clubhouse fire alarm. Electricians and the Fire Marshal found uncoated wiring and problematic windows in the gym and bathrooms, requiring alternate exits and ventilation. Three contractors reviewed the building in the spring, confirming needed repairs and code violations. They also noted mold issues in

bathroom ceilings and an inoperable fireplace that utilized interior-grade components. These issues will be corrected by the contracted vendor.

GATEHOUSE

The gatehouse's history is covered in the August Secretary's Report, which can be found on the Resident's Portal (i.e. Frontsteps). As touched on previously, the County and state registry did not have a record of the building being filed during the original construction. Earlier this year, the Board revisited the steps taken in 2024. The previous builder's family, former management companies, and the suggested original architect were re-contacted to locate the blueprints. The search was unsuccessful again. However, a former Director and other neighbors later noted that they had reviewed the records and transferred them to Elite Management, but the gatehouse records were not in any of the blueprints that were handed over by Elite Management to CAS and the Board Secretary. The former management company, Elite Management, was asked again and had no recollection of those records and could not locate them in their office. As such, a local architectural firm created as-built blueprints of the gatehouse. These blueprints were submitted to the County on May 6, 2025.

The vendor who completed the mold remediation earlier in the year withdrew from the project in August issuing a full refund of the deposit collected. Their decision was primarily based on record retention and documentation issues of the current structure.

As noted in the September meeting minutes, the Board accepted the quote for gatehouse repairs from the vendor managing the clubhouse project. They are currently completing the permitting process with the County.

The gatehouse's function is to serve as an office for property management (and/or possibly be utilized again for security guard(s) if future HOA members deem that necessary); storage of gate access systems/cameras; and storage of HOA documents/records and committee materials. Its function incorporates working/office space and essential storage.

Drywall repairs are needed after the mold remediation. Roof repairs are needed beyond simple tile/shingle replacements (per the inspection noting the potential of damaged sheathing and missing h-clips). Gutters are required. The storage/office space will be configured to optimize square footage. The originally designed uneven entrance to both doors must be addressed. The current bathroom is not to code. Since the County cannot locate any records of the structure being filed, the gatehouse cannot be grandfathered to historical codes. The building must be to code for occupancy and County official(s) sign off. Once the repairs begin, the contractor will coordinate with the security company to install the surveillance cameras which were perviously approved by the Board. In addition, Spectrum will pay for the damage caused to the overhead structure as soon as the work begins.

PAINT A PUMPKIN



Donna Gorman and Susan Perry are graciously hosting the next Social Events Committee Event on **Saturday, October 25 at the Clubhouse from 2:00 PM – 4:00 PM**. Join the scary crew for a Pumpkin Painting Party sponsored by the SEC with face painting and fairy hair hosted by Lourdes Yanes-Reefer.

SECURITY GUARD RESEARCH

“Will the HOA budget for security guards again as was done previously?” This question is asked several times a year. The Board and CAS researched updated pricing for a variety of options. Five companies were contacted and three provided estimates for on-site security, with one vendor also providing an option for virtual guards to manage the gate and/or other areas that need remote surveillance.

The findings from this research were shared during the October Board meeting.

- **Twenty-Four Hour On-Site Guard:** Pricing ranged from \$211,779 - \$253,344 (unarmed). Security cars for driving through the community are an extra weekly charge. Car pricing ranges from \$275 to \$325 per week (\$14,300 - \$16,900 annually). During the evening hours the guard service would remain at the gate. During the daytime hours, the guard service would patrol the neighborhood (if the gates remain open during the daytime hours) to monitor parking, traffic, and other violations.
- **Twelve Hour On-Site Guard:** This option could be used during the daytime to patrol the community or when the gate is closed to have someone on-site at the gatehouse. Pricing ranged from \$110,395 - \$126,672 (unarmed). Again, security cars would be extra.
- **Virtual Guard for Gate Access:** The security company that manages the Governors Club offers a virtual guard to manage gate access during the overnight hours. When someone is unable to reach a resident at the callbox, they would use the vendor’s video callbox to speak with a security guard who would follow the designated security protocol before allowing entry. Likewise, in the rare event that an EMS crew would be unable to enter the gates using the yelp siren, the virtual security guard would provide another layer of protection for the neighborhood. This virtual guard would replace the current “emergency” call-line. This service has a one-time set up fee of \$5,260 and then a \$5.80 hourly rate (at 84 hours per week), which equates to an annual investment of \$25,234.40 for the guard and a total investment of \$30,594.40. A decision on the need for a virtual guard was tabled until additional feedback is received on the *need* for a call-line – and if so, the requirements for the Association to manage the call-line.

SMILE BRIGHTLY!



Donna Gorman and Susan Perry are also graciously hosting the 3rd annual Legacy Photo Shoot presented by Rose Farrales and Seth Gold on **Sunday, November 2 at the Clubhouse from 12 Noon – 2:00 PM**. Sign up today via the link below to get your pics taken for your holiday cards or just because!

<https://www.signupgenius.com/go/10C0949A9AF29A4FBC07-59511773-legacy>

DUKE ENERGY SAVINGS – SOMETHING TO SMILE ABOUT!

Duke Energy issued a credit in the amount of \$34,266.95 to the Legacy HOA for an issue that Sydney identified and submitted in March. Sydney informed Duke that they were miscalculating the bill and due to not making timely repairs, the lights were staying on for an exaggerated amount of time. It took a few months, but Duke issued the substantial credit. Thank you, Sydney!

ANNUAL MEETING



The **Annual Meeting** will take place on the evening of **Tuesday, December 9, 2025**. Additional details regarding the time, agenda, and voting procedures will arrive this week in the annual mailer. Please check both your mailbox and email, as the mailer will be sent to the email address(es) you have on file with CAS and via the U.S. Postal service. The mailer includes the in-depth 2026 budget outlining the operating budget and projected Reserve-funded projects.

Per the email sent by CAS on October 21, 2025:

Please note that the budget ratification process is not established by the Board, management, or homeowner preference- it is defined by the Association's governing documents and North Carolina State Statutes. In accordance with Legacy's Governing Documents and the North Carolina Planned Community Act, the Association's annual budget is automatically ratified unless at least sixty-seven percent (67%) of the total membership votes to reject it. Put simply, **the budget isn't something the membership (homeowners) vote to approve**; it's considered ratified (approved) unless the required amount (67%) of the membership rejects it.

Rejection does not occur through the ballot at the Annual meeting. Instead, any household wishing to reject the budget may do so by submitting a written notice or email stating their property address and their rejection of the budget. There is **not** a form or official letter that needs to be completed. Please note that each property (lot) is counted as one rejection, regardless of the number of owners. The budget will not appear on the ballot, as this would not comply with both Legacy's Governing Documents and State Statute.

Unlike an annual meeting, budget ratification does not require a quorum. The quorum requirement for the annual meeting (10% of the membership) applies only to elections and other items of business requiring a membership vote.

If the budget were included on the ballot, it would **not constitute as an official vote** and would create procedural inconsistencies. Rejection would require a minimum amount of participation from 310 households (67% of the total membership), a level of turnout that historically has not been met. Past annual meetings have typically seen attendance of fewer than 100 homeowners.

The annual mailer contains specifics on where to email/mail any rejection notices.

ADDITIONAL UPDATES

Calling all candidates! If you are interested in running as a candidate for one of the four Director spots on the HOA Board, please read the information in the annual meeting mailer.

Other tips include: 1) Re-familiarize yourself with the governing documents, including the by-laws, rules, and regulations. 2) Read through the previous meeting minutes. 3) Reach out to current/past Directors. 4) Conduct online research regarding the NC Planned Community Act and the requirements of Directors and the officer roles of President, Treasurer, and Secretary. 5) Chat with your neighbors and get their opinion on The Legacy. 6) Familiarize yourself with what the Legacy Association is responsible for maintaining as a private Homeowners' Association (this includes but is not limited to the roads, bridges, golf course, grounds, stormwater ponds/SCMs, mowing of effluent spray fields, trails, landscaping, clubhouse, gym, pool, playground, tennis/pickleball courts, gatehouse, front entrance gates, construction gate, and waterfall. 7) Review the terms of the settlement agreement with Freehold.

Emails & FAQs: Did you know that there are frequently asked questions on the Resident Portal? If you have a question for CAS or the Board regarding community-wide topics, it's always a good idea to start with the FAQs. This is another reminder to sign up for the Portal/Frontsteps to ensure you are receiving communication and have access to the community records. Not every homeowner has registered. **Register *today* and be informed!**

[Legacy at Jordan Lake - Community Association Services, Inc.](#)

Halloween Trick or Treating:

The Legacy at Jordan Lake HOA nor the Social Events Committee organize an official Halloween *Trick or Treat* policy. If you would like to participate in the holiday, leave your front porch light on. DRIVERS – Please be extra cautious on Friday, October 31 when driving through the neighborhood during the evening hours.



**HAVE A HAPPY
HALLOWEEN!**