

The Legacy at Jordan Lake HOA New Homeowner Information & Onboarding Process

Effective Date: November 19, 2025

Approved by: Kory McLellan, President; Frank Perez, Treasurer; Jennifer Cox, Secretary; Rich St. Pierre, Member-At-Large/Assistant Treasurer

Administered by: Property Management Company (i.e., CAS)

1. Purpose

To ensure every new homeowner in the Legacy at Jordan Lake receives timely, accurate, and complete information about the community, its governing documents, rules, fees, and points of contact.

This process promotes homeowner understanding, smoother transitions, and consistent communication between the HOA, the property management company, and the new resident.

2. Responsibility

- The ****Property Management Company (PMC)**** is responsible for administering the onboarding process.
- The ****HOA Board of Directors**** oversees the process to ensure it aligns with community standards and governing documents.
- The ****new homeowner**** is responsible for reviewing all materials and providing any required forms or contact information.

3. Timeline Overview

- ****Notification of Sale****
 - Responsible Party: Title company / Realtor
 - When: Upon closing notification
 - What: Title company provides contact info for buyer and closing date to the Property Management Company.
- ****Initial Outreach****
 - Responsible Party: Property Management Company
 - When: Within 5 business days of notification
 - What: Property Management Company sends a “Welcome Email/Packet” with HOA and community information.
 - ****Account Setup****
 - Responsible Party: Property Management Company
 - When: Within 7–10 business days
 - What: Property Management Company sets up homeowner in HOA database, billing, and communication systems.

- ****Follow-Up****
 - Responsible Party: Property Management Company
 - When: Within 30 days
 - What: Property Management Company confirms receipt of materials and answers questions.

4. Information Provided to New Homeowners

The ****Welcome Packet**** (digital and/or printed) should include the following materials:

- Association Overview
 - Welcome letter from the Board or Property Management Company
 - Overview of the HOA's purpose, structure, and management contact information
 - Summary of amenities and common areas
 - Office hours, contact phone number, and email for management
- Governing Documents
 - HOA Declaration of Covenants, Conditions & Restrictions (CC&Rs)
 - Bylaws and Rules & Regulations
 - Architectural Review or Design Guidelines
- Financial & Administrative Information
 - Annual assessment amount and due dates
 - Payment options (online portal, check, auto-debit, etc.)
 - Late fee and collection policies
 - Budget summary and reserve fund explanation (optional for transparency)
- Communication Channels
 - Instructions for registering on the HOA's online portal or management platform
 - How to sign up for community emails or text alerts
 - Social media or HOA website links (if applicable)
 - Emergency contact information and after-hours procedures
 - Link to Frequently Asked Questions
- Architectural & Maintenance Information
 - Procedures for submitting an Architectural Change Request (ARC form)
 - Summary of maintenance responsibilities (HOA vs. homeowner)
 - Landscaping, trash collection, parking, and pet policies
- Security & Safety
 - Overview of any access systems (gates, fobs, parking permits)
 - Community security contact (if applicable)
 - Information about surveillance camera policy

5. Communication & Follow-Up

- Welcome Call or Email: The Property Manager or Assistant Manager contacts the new homeowner within the first two weeks to confirm receipt of materials and answer questions. This could be deferred to the Welcoming Committee.
- Database Update: The homeowner's contact info (email, phone, mailing address) is verified and entered into the HOA's communication and billing systems.
- Board Notification: The Property Manager provides a list of new homeowners to the Board in the monthly management report.
- Ongoing Engagement: New homeowners are added to all relevant communication lists and invited to upcoming community events or meetings.

6. Optional: Welcome Orientation

If the community finds value in this, the HOA or management company may hold **quarterly or semi-annual orientation meetings** to:

- * Introduce the HOA Board and management staff
- * Review governing documents and community expectations
- * Answer questions from new residents
- * Provide updates on current projects or neighborhood initiatives

The welcoming committee could assist with these orientations.

7. Recordkeeping:

The Property Management Company shall maintain records of:

- * Date of welcome packet delivery
- * Confirmation of homeowner contact information
- * Any follow-up communication
- * Copies of signed acknowledgment forms, if required by the HOA

These records should be securely stored and available for Board review upon request.

8. Policy Review

This process should be reviewed annually by the Board and management company to ensure compliance with evolving laws, technology, and best practices in homeowner communication. Regarding the above policy/procedure per the motion carried on November 19, 2025, this policy is carried indefinitely until amended by current or future boards with a carried motion.