

THE LEGACY AT JORDAN LAKE

Monthly Secretary's Report



THANK YOU!

By Jen Cox, HOA Board of Directors, Secretary

As we approach the end of the year, I want to thank each of you for your patience and support during a period of significant improvements and transitions. Our community has faced challenges—from major infrastructure repairs to finalizing the requirements of the settlement agreement to locating and storing Association records—but together, we have made remarkable progress.

The waterfall restoration is nearly complete and will soon reclaim its place as a defining feature of Legacy. The clubhouse renovations are wrapping up, and we have implemented new policies to strengthen security, streamline access, and improve communication.

A special thank you to the volunteers who have put tremendous amounts of time into the Grounds, Golf, and the Social Events Committees! Your dedication to the Legacy is greatly appreciated. A special shout-out as well to

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!

As communicated last week, the HOA attorney has advised that until we receive confirmation from local Fire, EMS, and Police that an approved emergency access method beyond the existing Yelp system is in place, whether through a virtual guard system or another approved option such as a

our Property Manager, Sydney DeLaGarza, who has guided the Board and community through several milestones over the past year. And, to fellow Directors, both past and present, thank you for sharing your valuable time with the community.

Looking ahead, the annual meeting on **December 9** will mark an important transition as new board members step in. Continuity and collaboration will be key to maintaining momentum. Please consider volunteering or attending the meeting to stay engaged in shaping our neighborhood's future.

Thank you for being part of this community and for helping us make the Legacy a place we are all proud to call home.

I wish everyone a very Happy Thanksgiving! May the peace and joy of the holidays be with you today and throughout the new year.



designated lock box, the gates should remain open to ensure immediate emergency access and shield the HOA from liability.

The Board met with local fire and rescue officials as well as gate system vendors to determine the safest, most compliant, and most cost-effective solution moving forward. This information was provided to legal counsel for review.

Additional methods of entry for first responders – in addition to the current yelp siren method – are being installed this week. As soon as the installation is complete, an email notification will be sent to the community with further updates.

We kindly ask that homeowners refrain from posting on social media about the gates being open, so that non-residents are not made aware of the situation. Thank you for your cooperation.

ANNUAL MEETING

Please remember to join us at the Annual Meeting on Tuesday, December 9th at 6:30 PM (6:00 PM Check In) at the Chatham County Agriculture & Conference Center 1192 U.S. 64 West Business, Pittsboro, NC 27312. Please refer to the details in the Annual Meeting mailer sent through the United States Postal Service. The information was also emailed (and posted to the Resident Portal) on October 23, 2025. Any questions for the Annual Meeting should be emailed to legacyjl@casnc.com by Wednesday, December 3 at 5:00 PM. Questions will be consolidated, answered, and distributed to the community via email prior to the Annual Meeting on December 9th

HOLIDAY PARTY

Susan Perry and Donna Gorman are hosting the Social Event Committee's Holiday Party on December 14th from 1:00 PM to 4:00 PM. Train rides, music, crafts, and a visit from Santa are just some of the fun festivities to enjoy.

PRESIDENT'S UPDATE

By Kory McLellan

We are finally at the end of the settlement agreement. Last month, as previously communicated, the Association's legal counsel for the settlement agreement sent Freehold's counsel 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. Unfortunately, Freehold did not agree to pay for the repairs in full. They offered \$20,000 and stated that the terms of the settlement agreement were met. As the roads meet the minimum viable DOT standard, the decision was made to accept the \$20,000 and close out the settlement agreement.

Freehold recorded a deed on November 10, 2025, that conveyed the remaining common areas and all the streets to The Legacy at Jordan Lake HOA. That deed was signed on June 11th. The Association's legal counsel for the settlement agreement confirmed that the letter issued to Freehold in July 2025 communicated that the HOA was not accepting title to the roads until the outstanding issues were resolved. This means that Freehold's recording of this deed was ineffective to transfer title. Now that we have reached a resolution of the outstanding issues, the transfer of title to the streets is effective.

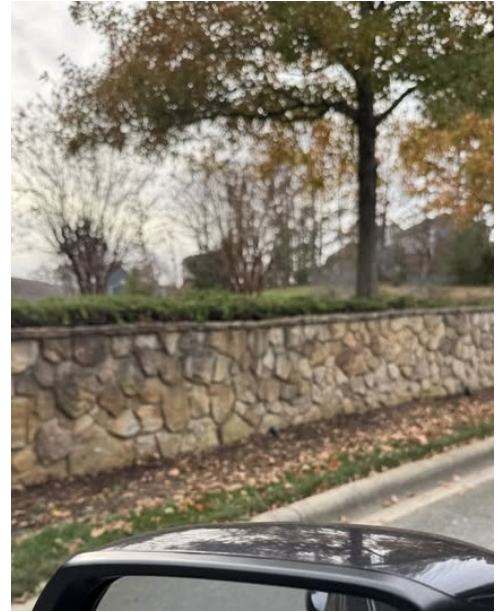
Please note that the transfer of title does not extinguish any of Freehold's contractual obligations under the Settlement Agreement. It simply means that the HOA now owns the roads and other common areas.

Stream Bed Conservation

Recently, I met with a private company that deals with entering creeks and stream beds into conservation easements for mitigation credits. We will most likely receive an official offer in the first or second quarter of the new year. We have roughly 33 acres that can be entered into the conservation easement via mitigation credits. Since most of our creeks are in great shape, they are considered preservation. For preservation, the estimate is \$2,000 - \$3,000 per acre versus \$10,000 per acre for restoration. The rough estimate for mitigation credits is approximately \$150,000 to enter our creeks into a conservation easement. The County is pleased with this plan and noted that we are probably one of the better HOAs to do this, given our location and topography. Once we get the finalized offer, we will bring it to the community. The vendor will come and talk to homeowners about this process - what it means, what it entails - before the Board will vote on it.

GROUNDS COMMITTEE

By Kory McLellan, Board Liaison



Volunteers began removing the invasive ivy along the stone wall at the entrance. The ivy was growing over landscape lights and into the stone wall. Per the October inspection report for the SCMs, all the ponds and SCMs are in functioning condition. The sink hole identified last month in the pond behind High Woods Ridge was remediated by the original builder after lengthy discussions with the County and builder. The work was done at no charge to the HOA, saving \$12,000. Fall and winter, deer-resistant plants were installed at the front entrance.

During the November 19th Board Meeting, the Board approved the following proposals:

Trail Bridge: The washed-out bridge on Covered Bridge Trail will be replaced with a wooden bridge in a less flood-prone location. The proposal will be submitted to the County for review. The project is necessary for maintaining trail access and has been included in 2026 reserve-funded projects.



Calling for volunteer Legacy elves

Golf Course Bridge: A wooden bridge will be installed on hole number two of the golf course to improve the walking path for golfers moving between holes.

French Drain: Per the recommendation of the Association's civil engineer, a French drain will be installed on Legacy Falls Drive South to alleviate the water seepage issues. This installation is necessary to prevent further deterioration of the road near the trailhead stairs on Legacy Falls Drive South.

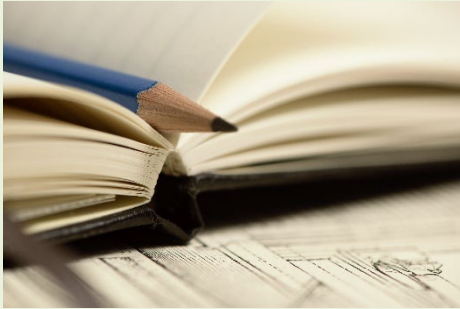
SCM Remediation: A proposal was accepted to remediate seven stormwater control measures (SCMs) throughout the community. The need for maintenance was emphasized due to previous neglect, which could lead to costly repairs if not addressed.

Tree Risk Assessment: A motion was made to remove 11 trees identified in the previous risk assessment study. The trees pose a risk of falling on properties, and their removal is part of ongoing maintenance efforts to ensure community safety.

ARCHITECTURAL REVIEW BOARD (ARB)

The Board of Directors ratified the unanimous appointment of Ron Kurtz to the Architectural Review Board. Congratulations, Ron! Thank you for volunteering!

POLICIES & PROCEDURES



The Board approved **five new policies and procedures**:

- Amenity Access
- Gate Access
- Email & Communication
- Surveillance Camera
- New Homeowner Onboarding

These policies will be posted to the Resident Portal (aka Frontsteps) upon the approval of the November 19th Meeting Minutes. A notification will be sent to the community when they are posted.

CONSTRUCTION UPDATES

CLUBHOUSE

We have positive news to report regarding the clubhouse construction.

- The fire assistant captain from station 1 and new fire marshal both confirmed code-wise that the windows in the bathrooms don't need to be operable. They noted that while the previous fire marshal recommended operable windows, it's not mandated.
- The vendor uncovered that the gas lines for the fireplace and grill were improperly installed and twisted during the original construction. These issues have been resolved. The grill has been replaced, and the gas logs for the fireplace are scheduled to be installed on 11/28.
- All the canned lights were changed along with the wiring to them. The wiring was fried due to moisture intrusion.
- The drywall repairs/painting and security closet vent installation were scheduled for this week but will be rescheduled due to personnel scheduling difficulties.
- There were a few issues with how the HVAC was originally installed that caused excessive moisture in the gym and within the ductwork. First, there is a bulkhead along the perimeter of the gym ceiling. The bottom face of the bulkhead holds the registers. Originally, the registers blew cool air directly on the windows, which created a higher-than-normal moisture level inside the gym. The other issue identified that the unit outside was installed with a skirt built from duct board that failed and let moisture in through the unit which built up inside the ductwork resulting in mold and mildew issues. These issues were corrected by relocating the registers to the vertical side of the bulkhead so that the air is directed towards the center of the room versus hitting the windows. This will help the efficiency of the unit, allowing the room to cool more efficiently. The faulty skirt was replaced, and all mold/mildew was remediated.

- We have received a couple of questions regarding the clubhouse roof. The June Secretary's report and prior meetings discussed the findings from the 2024 Transition study with regards to the clubhouse roof. The Transition Study states: "The shingles at the clubhouse building roofs were noted to be woven at valleys. Most major shingle manufacturers do not recommend woven valleys when using architectural-grade shingles. We recommend the shingled roof surfaces be modified to be either open-cut or closed-cut at the valleys per the manufacturer's installation recommendations. Some small sections of standing seam metal roofing were noted on the building roof surfaces. The asphalt shingles immediately adjacent to the metal roofing were noted to be lifted in multiple locations due to an improper angle of the metal flashing along the perimeter of the metal roofing. The current configuration may lead to premature damage to the shingles during high wind events and/or wind-driven rain events. We recommend modification of the metal flashing to ensure that the asphalt shingles are properly installed. Some minor damage was noted to the shingles above the clubhouse buildings. The damage to the shingles appears to be from handling during the original installation or a material defect. Mechanical damage was noted on the shingles which resulted in a loss of granules and exposed fiberglass layers in the shingles. Additionally, several shingles were noted to be missing from the hip roof above the fitness center." The initial inspection for the Transition Study was conducted in February 2024. The number of shingles that were missing or damaged over the gym area, along with lifting of the shingles along the metal flashing, resulted in minor leaks. Patching these areas would not have come with a warranty. As for the valleys, the contractor consulted the shingle company and received the following in a signed letter from Timberline: "This is to confirm that installing Timberline® shingles with woven valleys will not void the GAF Shingle & Accessory Limited Warranty." As such, the woven valleys will remain as installed.

GATEHOUSE

The vendor is working with the County to secure permits. As noted in previous communications, upon receipt of the permits the damage caused by the Spectrum truck to the exterior overhang will be repaired. Additional information regarding the gatehouse construction will be provided as soon as it becomes available.

WATERFALL

The project is on track. Significant progress has been made on the waterfall restoration project, including the completion of trapezoid footings and addressing structural issues. There were no footings with the original installation. One of the biggest issues uncovered last week was the left-facing wall. The hole was so deep that when pouring the cement it just ran down the into the pond below; so, the vendor had to hand trowel it all in. In addition, there was no rebar. The vendor drilled and installed rebar. The two walls atop were not tied together; that was corrected with rebar and cement. The vendor hand built walls on the left-hand side to prevent the slope from eroding anymore. The pump room has been cleaned and updated; waiting for the motors to arrive to complete the mechanicals. The RicoRock staining will begin soon. The waterfall will have flow meters on all the lines coming in so the HOA can know how much water is flowing through through each line. It will be monitored 24-7 through an app that will record critical functions at the waterfall. The vendor will be online as well. So if something goes wrong, they'll be actually calling us before we call them.



It's a wrap! Thank you for your trust in me to represent the community on the HOA Board of Directors. It has been a unique experience at every turn. The next Board will pick up the communications from here. All the best!

Jennifer Cox, HOA Board of Directors, Secretary
