

## DuckHaven HOA - Transfer Meeting 1/07/2020 - 1300

Location: Clarke & Wyndham, Inc. Offices

Attended By:

- Micah Mogle - HOA
- Debbie
- Trish
- Victoria Kana - Administration / Payment
- Travis - Duckhaven / Developer / Been Since the beginning
- Christina - HOA Manager / Liaison / POC / Dues etc need help
- TBD

## Agenda

- Hear from Travis
- Q&A from HOA
  - How is the HOA currently formed as a business? (LLC, 401c3?) etc
  - Who are the on file "officers" of the HOA
  - What are plans on updating documentation?
  - Transfer Documentation
    - Bylaws (Current and Past)
    - Articles (Current and Past)
    - Covenants (Current and Past)
    - Contracts (Current and Past)
    - Other pertinent documentation
    - Accounting
      - P&L
      - Members and Account Histories etc etc
      - Funds and Transfer
  - Transfer of Web / Email / Social Media Properties
  - What accounting system is being used now?
    - Currently uses SAGE for all accounting
    - PAYHOA is something they have been looking at.
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## NOTES:

- Introductions
- Talked about needing to provide information
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