

Heritage Pointe Condo Association
Finance Committee

Meeting Agenda

Thursday April 20, 2023

- 9:00 AM**
- I. Welcome Paul
 - II. Approve Minutes Consent Agenda
 - III. Review Monthly Financials
 - A. Topline Review Valerie & Jack
 - B. Review Issues / Opportunities All
 - C. Improvement Recommendations Valerie
for tracking
 - D. Assessment # 2 -payment status Valerie
 - E. Delinquencies / past due status Valerie
 - IV. Progress Updates
 - A. Mandatory building Inspections / HOA Insurance Review Chuck K.
 - B. Communications Allan F.
 - C. Investment / LOC Options Bob S. & Paul D.
Investment Policy All
 - V. Ian Follow Up
 - A. Ian-specific tracking Paul
 - B. Owners communication Paul
Insight into current approach
 - C. Reco's All
 - VI. Adjorn

Please note: This meeting begins at 9 AM in the clubhouse. For those offsite, it is going to be available on TEAMS. Valerie will send each of us the link along with instructions.