

Heritage Pointe Master Association

Finance Committee

Meeting Agenda

Thursday August 17, 2023

Please note: This meeting begins at 10:30 AM.

- 10:30 AM**
- I. Welcome Paul
 - II. Approve Minutes Consent Agenda
 - III. Review Monthly Financials
 - A. Topline Review Valerie & Jack
 - B. Delinquencies / past due status Valerie
 - C. Assessment # 2 -payment status Valerie
 - D. Review Issues / Opportunities All
 - IV. Updates
 - A. Investment Status Paul
 - B. 2024 Budget planning process Chuck K.
 - V. Ian Follow Up Paul
 - A. Ian-specific tracking
 - B. Supplemental claims
 - C. Owners communications
 - 1 First-floor approach
 - 2 Floors 2 - 4 approach
 - VI. Adjorn