

Heritage Pointe Master Association

**Finance Committee**

**Meeting Agenda**

Thursday June 15, 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 communication
      - 1 First-floor approach
      - 2 Floors 2 - 4 approach
  - VI. Adjorn