

Heritage Pointe Condo Association
Finance Committee

Meeting Agenda
Thursday March 16, 2023

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|---|----------------|
| I. Welcome | Paul |
| II. Approve Minutes | Consent Agenda |
| III. Finance Committee 2.0 | Paul / All |
| IV. Review Monthly Financials | |
| A. Topline Review | Valerie & Jack |
| B. Review Issues / Opportunities | All |
| C. Next Steps | All |
| V. Ian Follow Up | |
| A. Ian-specific tracking | Paul |
| B. How should we communicate
with owners ? | All |
| 1. Assessments / et al | |
| 2. Updates | |
| 3. Solicit their feedback | |
| VI. Ramp Up Next steps | |
| A. Contract review | Paul & ??? |
| B. Areas of Expertise | Members & Paul |
| C. Establish S.O.P. | All |
| VII. Adjorn | |

Thank you for lending your time and expertise in support of Heritage Pointe !