

Heritage Pointe Master Association  
**Finance Committee**

**Meeting Agenda**

Thursday May 18, 2023

*Please note: This meeting begins at 9 AM . It is going to be available on TEAMS.  
Valerie will send each of us the link along with instructions.*

- 9:00 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. Mandatory building Inspections / HOA Insurance Review Chuck K.
    - B. Communications Allan F.
    - C. Investment Options Bob S. & Paul D.
  - V. Ian Follow Up Paul
    - A. Ian-specific tracking
    - B. Supplemental claims
    - C. Owners communication
  - VI. 2024 Budget Process Chuck K.
  - VII. Adjorn