



FirstService Residential Houston  
1330 Enclave Parkway, Suite 425  
Houston, TX 77077-2577  
(713) 932-1122 • Fax: (888) 569-1155



# Closing Instructions

# AMI-B17927

## Announcement

**Introducing our new online submission of HOA & Condo post-closing requirements!** Our new Post-Closing Module will simplify your day-to-day operations, provide you with full transparency and ensure the ownership has transferred with accuracy. Forget about the days of last-minute requirements gathering, costly overnight packages and delayed communications! Simply access your order via FirstService Residential Houston's resale and lending ordering site and upload the final payments and required closing documents.

- 1) Go to <https://secure.welcomelink.com/resale/mg/AMI>
- 2) Login and access order AMI-B17927 via the "My Orders" interface
- 3) Click the "Closing" tab and follow the instructions

## Closing Summary

Attached is the completed Certificate you recently requested from FirstService Residential. Please review it carefully. Immediately upon settlement, the following items must be returned via our online post-closing submission process:

### 1) REQUIRED PAYMENT

Upload an image of the following check(s) exactly as outlined below; no exceptions. A physical copy is not required. Payments will be returned to be re-issued if not issued accordingly.

**3525 Sage Council of Co-owners**  
**FirstService Residential**

**\$3,666.96 (Pay at Close)**  
**\$366.50 (Pay at Close)**

**When sending multiple fees to the HOA, please include the breakdown of the fees collected to ensure the payment is applied accordingly and specify which party submitted payment (seller or buyer).**

### 2) CLOSING DOCUMENTS

Upload a completed copy of the following documents. Documents will be returned to be re-issued if not completed properly. Ownership transfer will not occur until these documents are received.

- **Warranty Deed/Settlement Statement**
- **Completed Owner Information Form**
- **A Copy of the Certificate**

## Important

- This certificate is only valid for 60 days. If the closing does not occur by the last business day of the current month a new certificate must be obtained from FirstService Residential and any additional amounts due must be collected at closing.
- An update of this document is available within 60 days of the original request for a fee of \$75.00. Please log on to <https://secure.welcomelink.com/resale/mg/AMI> and access "My Orders" to request an update. If you request an update after 60 days, the entire processing fee will apply. PLEASE NOTE: Verbal updates will not be provided; please do not request them.
- This certificate is only valid for the Current Owner and Borrower listed. If the current owner listed is not correct, a copy of the warranty deed for the current owner along with any prior owners and/or relocation services is required. Additional amounts may be due.
- Issuance of this is contingent upon full payment of all processing fees associated with this transfer. If any payment submitted is not honored, the Certificate will be invalid.



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# Resale Certificate Disclosure

# AMI-B17927

Association: **3525 Sage Council of Co-owners**  
 Property Address: **3525 Sage Rd, Apt 711  
 Houston, TX 77056**  
 Current Owner(s): **Diana Hsiung**  
 Borrower(s): **Raquel G Davis and Ryan C Davis**  
 Certificate Preparation Date: **12/28/23**

## Certificate Preparation Information

The following is a statement including the disclosure fee charged for the preparation of this certificate and any subsequent documentation.

Service Requested: **Resale Processing Update**  
 Requested By: **Caryn Tran**  
 Company: **Chicago Title**  
 Amount Paid: **\$75.00**  
 Payment Method: **Credit or Debit Card**  
 Settlement Date: **12/28/23**

## Account Information

**SECTION 82.157 A.2 & A.3** of the Texas Property Code requires a statement regarding the unpaid common expenses or special assessments due and currently payable from the selling unit owner and other unpaid fees or amounts payable to 3525 Sage Council of Co-owners for account number SG669-SG669-0711-01.

<b>Payable to: 3525 SAGE COUNCIL OF CO-OWNERS</b>		<b>\$3,666.96 (Pay at Close)</b>
<i>Please issue one check for the Total Due listed in this section, payable to 3525 Sage Council of Co-owners. Title payments will be returned to be reissued if not issued accordingly.</i>		
<u>Description</u>	<u>Amount</u>	<u>Due From</u>
Seller Account Balance <i>Monthly Assessment is due on the 1st of each month   Seller's Balance does not include January Monthly Assessment</i>	\$112.72	Seller
Advance Assessment <i>Equal to Two Months Assessment</i>	\$1,577.12	Buyer
Advance Utilities (Buyer) <i>Advanced Utilities - Estimated</i>	\$250.00	Buyer
Working Capital Fee <i>Equal to Two Months Assessment</i>	\$1,577.12	Buyer
Advance Utilities (Seller) <i>Advanced Utilities - Estimated</i>	\$150.00	Seller
<b>Total Due</b>	<b>\$3,666.96</b>	
<b>When sending multiple fees to the HOA, please include the breakdown of the fees collected to ensure the payment is applied accordingly and specify which party submitted payment (seller or buyer).</b>		

Please note that one-time fees such as Reserve Fund Contributions, Working Capital Contributions, Cap Fees, and Conveyance Fees are non-refundable.



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# Resale Certificate Disclosure (continued)

**AMI-B17927**

**Payable to: FIRSTSERVICE RESIDENTIAL** **\$366.50 (Pay at Close)**

Please issue one check for the Total Due listed in this section, payable to FIRSTSERVICE RESIDENTIAL. Title payments will be returned to be reissued if not issued accordingly.

<u>Description</u>	<u>Amount</u>	<u>Due From</u>
Welcome Disclosure Fee	\$26.50	Buyer
Transfer Fee	\$340.00	Buyer
<b>Total Due</b>	<b>\$366.50</b>	

**Immediately upon settlement, the following items must be returned along with the amounts listed above:**

1. Warranty Deed/Settlement Statement
2. Completed Owner Information Form
3. A Copy of the Certificate

**When sending multiple fees to FirstService Residential, please include the breakdown of the fees collected to ensure the payment is applied accordingly and specify which party submitted payment (seller or buyer).**

**Ownership transfer will not occur until these documents are received.**

Please note: Late fees, additional assessments and other charges will be added as they occur. The requester is responsible for obtaining an update for the account after the date above.

## Assessment Information

**SECTION 82.157 A.2** of the Texas Property Code requires the disclosure of the amount of the periodic common expense assessment.

2023 Monthly Assessment	<b>\$563.26 due monthly</b>
2024 Monthly Assessment:	<b>\$788.56 due monthly</b>
2023-1 Special Assessment (PAID):	<b>\$1,477.66</b>
2023-2 Special Assessment (PAID):	<b>\$1,477.66</b>
2023-3 Special Assessment:	<b>\$1,477.66</b>

Please see attached documents regarding the Special Assessment.

Late Charge(s):	<b>\$8.45 due monthly</b>
	1.50% per month will be attached to any assessment received 31 day(s) after due date.
Late Charge(s):	<b>\$25.00</b> will be attached to any assessment received 11 day(s) after due date.
Fiscal Year:	<b>January to December</b>

Note: Due to year end, adjustments may be required for assessment amounts.

**Make checks payable to:** 3525 Sage Council of Co-owners.



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## Resale Certificate Disclosure (continued)

AMI-B17927

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### Additional Information

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At the monthly November 2022 Board Meeting, the 3525 Sage Council of Co-Owners Board of Directors approved a \$500,000 Special Assessment. As discussed in the monthly November 2022 Board Meeting, it is time to advance the first Special Assessment for 2023 in order to fund the EIFS (Exterior Insulation Finishing System) project. The full amount for the 2023-1 Special assessment is due on or before April 30, 2023. The full amount for the 2023-2 Special assessment is due on or before October 31, 2023. The full amount for the 2023-3 Special assessment is due on or before April 30, 2024.

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### Violation Information

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**SECTION 82.157 A.9** of the Texas Property Code requires the disclosure of any alterations or improvements to the unit or to the limited common elements assigned to that unit known by the board that violate the declaration, bylaws or association rules.

**No known violations as of Thursday, December 28, 2023.**



## Resale Certificate Disclosure (continued)

AMI-B17927

### Other Disclosures

**SECTION 82.157 A** of the Texas Property Code requires that the unit owner must furnish to the purchaser a current copy of the declaration, bylaws, any association rules, and a resale certificate issued by the association that contains the current operating budget of the association.

**See attached restrictions, bylaws, association rules, operating budget, and resale certificate.**

**SECTION 82.157 A.1** of the Texas Property Code requires a statement of any right of first refusal or other restraint contained in the declaration that restricts the right to transfer a unit.

**There is no right of first refusal or other restrictions limiting the owner's right to transfer.**

**SECTION 82.157 A.4** of the Texas Property Code requires a statement of capital expenditures, if any, approved by the association for the next 12 months.

**Statement of capital expenditures with be provided by 2/28/22.**

**SECTION 82.157 A.5** of the Texas Property Code requires a statement of the amount of reserves, if any, for capital expenditures and the portions of those reserves designated by the association for a specified project.

**\$712,110.20**

**SECTION 82.157 A.6** of the Texas Property Code requires a statement of any unsatisfied judgments against the association.

**There are no unsatisfied judgments owed.**

**SECTION 82.157 A.7** of the Texas Property Code requires a statement of the nature of any pending suits against the association.

**Harris County Civil Procedure Case 2023-08963 Court 11**

**SECTION 82.157 A.8** of the Texas Property Code requires a statement that insurance coverage is provided for the benefit of the unit owners.

**See attached insurance certificate.**

**SECTION 82.157 A.10** of the Texas Property Code requires a summary or copy of notices received by the board from any governmental authority concerning violations of health or building codes with respect to the unit, the limited common elements assigned to that unit, or any other portion of the condominium.

**3525 Sage Council of Co-owners has not received any notices from any governmental authority regarding health or housing code violations.**

**SECTION 82.157 A.11** of the Texas Property Code requires a statement of the remaining term of any leasehold estate that affects the condominium and the provisions governing an extension or renewal of the lease.

**There is no leasehold estate affecting the condominium.**



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## Resale Certificate Disclosure (continued)

AMI-B17927

**SECTION 82.157 A.12** of the Texas Property Code requires the disclosure of the name, mailing address, and telephone number of the association's managing agent.

**The following is the principal contact for the Association:**

Managing Agent: **FirstService Residential**  
 Association: **3525 Sage Council of Co-owners**  
 Address: **1330 Enclave Parkway, Suite 425**  
**Houston, TX 77077-2577**  
 Telephone: **(713) 932-1122**

## Certification

This resale certificate disclosure is prepared as true and correct to the best ability of FirstService Residential. An update of this document is available within 60 days of the original request for a fee of \$75.00.

\*This certificate is only valid for 60 days. If the closing does not occur by the last business day of the current month a new certificate must be obtained from FirstService Residential and any additional amounts due must be collected at closing.

\*This certificate is only valid for the Current Owner and Borrower listed above. If the current owner listed is not correct, a copy of the warranty deed for the current owner along with any prior owners and/or relocation services is required. Additional amounts may be due.

### *Resale Documentation Department*

FirstService Residential  
 Resale Documentation Department

*Transfer of ownership will not take place until all requested items are received.*

**\*Please remember to include the top portion of your HUD Statement AND the Owner Information Form when sending FirstService Residential any closing documents.**

**\*FirstService Residential does not track the number of second homes, or offsite addresses for this property. If you require additional information, please obtain the tax rolls for this property.**

**\*The Association is not a party to the above-referenced transaction and is providing the information contained in the certificate at the specific request of the owner(s). The Association believes the information contained on the certificate is accurate. However, in the event of an inadvertent error, no such information shall ever be used to the detriment of the Association or be construed as an admission or waiver on the part of the Association.**

**\*The Association is not and shall not in any way be considered an insurer or guarantor of security within the subdivision of the property of owner.**



January 30, 2023

Please note that today, all owners received a Metertex statement with a printed error stating the full amount (monthly assessment + special assessment) is due February 13<sup>th</sup>. The full amount for your 2023-1 Special assessment is due on or before April 30, 2023.

Metertex will be issuing new statements this week. Please contact Rachel Carnahan if you do not receive an updated statement by Wednesday, February 1<sup>st</sup>. [rachel.carnahan@fsresidential.com](mailto:rachel.carnahan@fsresidential.com)

- Why do we have a special assessment?
  - At the monthly November 2022 Board Meeting, the 3525 Sage Council of Co-Owners Board of Directors approved a \$500,000 Special Assessment. We would first like to thank the Owners here at 3525 Sage for your patience and understanding while we continue to complete all of the ongoing projects in order to improve your property values. The Board of Directors continue to improve the structural integrity and curb appeal of our building, thereby enhancing all of our overall property values. As discussed in the monthly November 2022 Board Meeting, it is time to advance the first Special Assessment for 2023 in order to fund the EIFS (Exterior Insulation Finishing System) project.
  
- What does this mean for you?
  - If you have your ClickPay account set to “auto pay,” please adjust from “full amount” to “fixed amount” so that you have control of what you pay, when you pay. You may also temporarily remove the auto pay feature and pay by check. A **red lockbox** for special assessment checks will be located at the lobby level concierge desk. Please ensure that your checks are made out to 3525 Sage Council of Co-Owners, specifying your unit number.
  - If you wish to remove auto pay, please contact ClickPay at 1.888.354.0135 as the management office is not able to do so.
  
- How can you make your payments?
  - We understand that the decision to assess is never a pleasant one, however, this funding is both necessary and appropriate to protect all present and future interests of our building and individual residences. You may make a one-time payment in full or split your payments as you wish over Feb/Mar/April 2023.

We apologize for all confusion caused by the system error however we are working diligently to provide updated statements. The Special Assessment is available for payment via ClickPay beginning February 1<sup>st</sup>. If your payment is received after April 30<sup>th</sup>, you will be charged a finance charge of 1.5% + an additional \$25 late fee each month until paid in full. The 3525 Sage Board of Directors is committed to ensuring resident funds are used in an economical manner and is confident that owners will clearly see the positive impact of their investments.

# 3525 Sage Council of Co-Owners

WEEKLY NEWSLETTER

## 2023 Special Assessment

As you know, the Board of Directors and FirstService Residential are committed to improving the overall integrity and appeal of 3525 Sage Co-Owners Condominiums. In accordance with the Texas Uniform Condominium Act, Tex. Prop. Code §§ 82.001 (TUCA) and the governing documents of 3525 Sage Council of Co-Owners, the Board of Directors has a responsibility to protect, improve and/or maintain the asset of the building in compliance with the Reserve Study. Working with other high-rise communities to identify the most suitable and most cost-efficient options for 3525 Sage, details of the EIFS (Exterior Insulations Finishing System) Project were shared with all co-owners at the November 2022 Board Meeting. A vote of the Board of Directors was held and with unanimous approval the Board passed a Special Assessment of \$1.5 million to fund the necessary structural integrity and overall appeal of our building.

The EIFS Project will be performed by CRX, Inc., and will be completed in three phases, each estimated at \$500,000. This restoration and waterproofing project will involve a full building elastomeric coating for waterproofing as well as sealing of the windows and stucco with DOWSIL 123. The project will be implemented on one side of the building at a time (or three phases), beginning with the East side which has already commenced. Weather permitting, it is anticipated that each phase will take approximately six-eight (6-8) months per side.

There are three (3) scheduled installments of the 2023 Special Assessment:

- The first (2023-1) installment was issued February 1, 2023, due by April 30, 2023;
- The second (2023-2) will be issued September 1, 2023, due November 31, 2023;
- The third (2023-3) will be issued February 1, 2024, due April 30, 2024

For each phase, every homeowner may choose a one-time lump sum payment or a 3-month installment plan. The installment plan will be Feb/Mar/Apr or Sept/Oct/Nov in the calendar year of 2023 respectively. Either is due in full by the due dates noted above. ClickPay is the preferred way of accepting payments. If your payment is received after the due date, a finance charge of 1.5% plus an additional \$25 late fee will be assessed each month until paid in full.

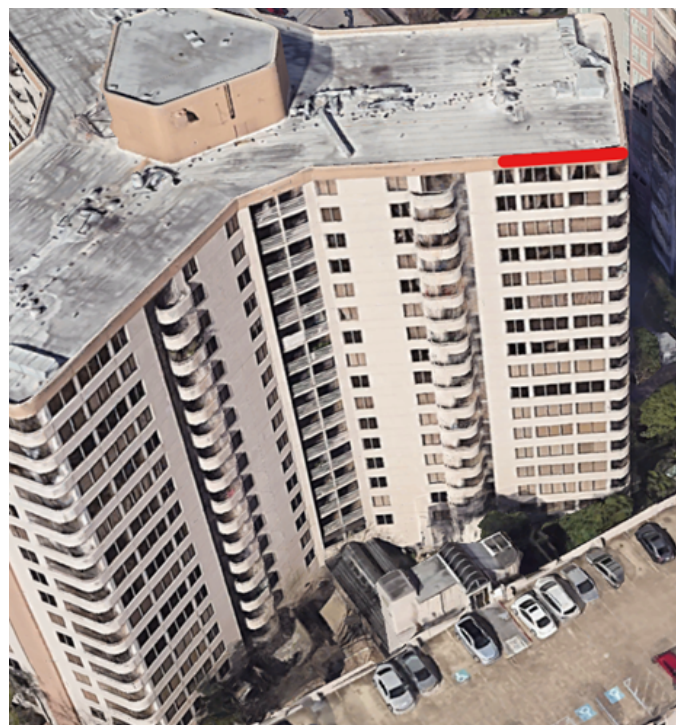


# 3525 Sage Council of Co-Owners

WEEKLY NEWSLETTER



The 10th stack has been power washed, CRX, Inc. will begin painting Monday 2/6/23



CRX Inc. will begin the silicone elastomeric coating to waterproof the EFIS Façade.



<- Early next week, CRX Inc. will install an additional swing stage at the 04' stack to begin work on each end.



RESIDENT INFORMATION – EMERGENCY & SECURITY

DATE: \_\_\_\_\_ UNIT# \_\_\_\_\_

Resident Name: \_\_\_\_\_ Home Phone: \_\_\_\_\_

Work Phone: \_\_\_\_\_

Cell Phone: \_\_\_\_\_

Resident Name: \_\_\_\_\_ Home Phone: \_\_\_\_\_

Work Phone: \_\_\_\_\_

Cell Phone: \_\_\_\_\_

LIST ALL PERSONS RESIDING IN CONDOMINIUM: \_\_\_\_\_

PROVIDE NAMES OF NON-RESIDENT WITH KEYS TO RESIDENCE: \_\_\_\_\_

TYPE OF LOCK ON CONDOMINIUM (CHECK ONE)

- Pass-key main lock only, Pass-key & deadbolt, Other (explain), Changed main lock only, Changed main lock & deadbolt

HAS A COPY OF ALL KEYS BEEN FURNISHED TO THE PROPERTY MANAGER IN CASE OF FIRE? YES NO

WHO DO YOU WANT US TO LET INTO YOUR RESIDENCE? \_\_\_\_\_

WHO DO YOU NOT WANT US TO LET INTO YOUR RESIDENCE? \_\_\_\_\_

THE ABOVE-NAMED RESIDENT(S) CAN DESCEND THE STAIRS: Unassisted by walking, if assisted only if carried other: \_\_\_\_\_

PERSONAL PHYSICAL CONDITION WHICH MAY CAUSE NEED FOR SPECIAL ASSISTANCE: \_\_\_\_\_

IN CASE OF EMERGENCY, THE FOLLOWING SHOULD BE NOTIFIED:

PRIMARY PHYSICIAN NAME PHONE
RELATIVE #1 NAME PHONE
ADDRESS ALT PHONE
RELATIVE #2 NAME PHONE
ADDRESS ALT PHONE

DESIRED HOSPITAL SHOULD AN EMERGENCY ARISE: \_\_\_\_\_

EXECUTOR OF ESTATE OR POWER OF ATTORNEY: \_\_\_\_\_

The undersigned acknowledges that the above information is submitted as a means to only aid 3525 Sage in cases of emergency. The Board of Directors and all others concerned with safety, disclaim any responsibility for injury or damage to those involve by either the use or nonuse of this information.

SIGNATURE \_\_\_\_\_

SIGNATURE \_\_\_\_\_

EMAIL \_\_\_\_\_

EMAIL \_\_\_\_\_

Please return all completed forms to Property Management via email
Lynnette.Hicks@fsresidential.com and Kyle.Gartman@fsresidential.com