

## Provided Amenities

The following tables are provided to *summarize* HOA-provided amenities – including certain items of individual home maintenance – through our assessments.

***Refer to our governing documents (specifically the Declaration and the Architectural Rules & Regulations (AR&Rs) for more specifics of homeowner rights and responsibilities.***

### NOTES:

1. Heritage Grand, through operational decisions of its homeowner-elected Board of Directors, develops and implements budgets that links income (our dues) with expenses (operational costs which include amenities).

Because of this financial balance necessity (as well as other considerations such as striving to maintain HOA competitiveness with other 55+ communities or generational amenities expectation changes), **provided amenities may change**.

See the separate guideline entitled “Guideline for Board Actions Concerning Amenities Changes” for the routine *process* the Board presently utilizes to study/increase/reduce offered amenities.

2. Items shown in the chart as NOT provided by the homeowners association (HOA) are therefore individual homeowner expense components. If in doubt, the decision of the Board of Directors is controlling.
3. The following separate guidelines contain additional information associated with this information and might be found useful:
  - Association-Owned Fence Damage Repair Debited to Homeowners
  - Landscaping Services for Heritage Grand Residents
  - HGHOA Tree Management
  - House Painting
  - Homeowner Guidelines for Common (Cedar) Fences
  - Americanas (Individual) Property Insurance

*Disclaimer: If information in this document (or any other guideline) conflicts with what is found in our governing documents, the governing documents information prevails.*

This Board-owned guideline (revision) was ratified by a majority Board vote on 12/11/23 .

*Jim Ireland*

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Jim Ireland, Secretary

*(This is a rewrite of a 2/15/21 guideline having the same title.  
Document was updated 4/10/23 & 12/11/23 to reflect current Monthly Dues amounts.)*

## Amenities Furnished Through Heritage Grand Dues

**Housing Type:**

<b>Stand-Alone Housing</b>	<b>Duplexes (Americanas)</b>
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**2024 Monthly Dues Amount:**

<b>\$335</b>	<b>\$478</b>
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<b>Services Provided for <u>EACH</u> Heritage Grand Home:</b>		
House Exterior repainted, including painted doors (every 9 years per HOA schedule)	<b>Yes</b>	
Stained Front Door refinished (minimum 3 years, on request)		
Front Yard mowed, fertilized, mulched, insect-treated on a regular schedule		
Prune Shrubs ( <u>front</u> yard beds only) per a regular schedule		
Sprinkler System for routine repairs and limited adjustments for front and back yards (five zones maximum); backflow preventer valve (unless failure due to inadequate freeze protection) Exception: controller device <u>not</u> maintained or supported Note: System additions or modifications are not covered and must be approved by the HOA		
<b>Additional <u>DUPLEX-SPECIFIC</u> Considerations:</b>		
Property Insurance (building shell)	<b>No</b>	<b>Yes</b>
Maintenance and Repair specific to property insurance-covered items		
Roof Shingles and Decking Replacement as required (last done in 2020)		
Roof Leaks (specifically due to roof shingle failures, not penetrations)		
Gutter and Downspouts repair and replacement (cleaning is not included)		
James Hardie (cement board) exterior siding repair and replacement (not windows, doors, or window or door frames)		
Homeowner-requested roof penetrations (three years after installation)	Not Applicable	See R&Rs
<b>Heritage Grand Community-Wide Amenities (nonspecific to homes):</b>		
Clubhouse Use including Exercise Room and Recreational Spaces	<b>Yes</b>	
Recreational Facilities including Swimming Pool & Spa, Miniature Golf, Bocce Ball, Pickleball, Basketball (half court), Shuffleboard		
Routine Clubhouse Activities and Events Bingo, Trivia, Movie nights, Drama Presentations, Dances, Bridge, Canasta, Poker, Chess, Crafts, Line Dancing, Pingpong, Pool Tables, Ladies Lunch Group, Couples Dinner Group, etc.		
Common Area Trees, Tree Pruning, and Tree Canopy Management		
Common Area Fences and Perimeter Fences furnished and maintained		
Common Areas mowed, watered, fertilized on a regular schedule		
Common Area Shrubs & Trees maintained (trimmed, pruned, removed as needed)		
Seasonal Color Plantings (in various common areas)		

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<b>Heritage Grand Community-Wide Amenities (cont'd):</b>	
Streets, Curbs, and Community Sidewalks maintenance	<b>Yes</b>
Water Features -- Two Ponds & Two Fountains	
Subdivision Gates maintained (primary gate closed at night only)	
Weekly neighborhood Mosquito Spraying (during a defined season)	
Cinco Ranch Recreation The Cinco amenities include the use of six pools, the Cinco Beach Club, the boat docks, fishing lakes, sand volleyball courts, tennis courts, soccer nets, baseball backstops, covered pavillions, BBQ grills and hiking/biking trails.	
Home Cable TV & Internet A 2023 through 2029 contract between Comcast and Heritage Grand delivers the following "X-1 System" services for each of our 650 homes: (a) a DVR plus two companion boxes (all with voice-activated remotes) allowing for three TV connections; (b) "Digital Preferred" TV Channel package; (c) Comcast modem/router for home computer and wi-fi service, supplying 150Mbps download speed. Note: The home's inside-the-wall wiring is owned and maintained by the property owner. If desired, residents procure additional services from Comcast and pay for those services through direct billing.	
Home Security Monitoring In-house security wiring is owned and maintained by the property owner. The HOA pays for the monitoring fees of homes utilizing Modern Systems (the company Heritage Grand has a contract with). It is the sole responsibility of each resident to confirm that their specific system is correctly being monitored. With many homes no longer utilizing the hard-wired "land line" anticipated when the contract was negotiated, extra fees may be required to connect via a cell service.	
<b>Funding Plan for Future Large Infrastructure Needs:</b>	
<b>As of 11/27/2023 the Reserve Fund totals approximately \$3.1 million.</b> Funding Goal: The Funding Goal of "reserves" is to have adequate but not excessive monies available when significant expenditures could be logically anticipated during the study's 30-year target period. We contract with Reserve Advisors, Inc, Milwaukee WI (RA) to define necessary funding for this future infrastructure spending. Our current study is dated 7/27/20, revised 3/25/21.	<b>Yes</b>

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<b>Funding Plan for Future Large Infrastructure Needs (cont'd):</b>	
<p>A Cash Flow Method is used by RA to compute the plan. Their method offsets future variable expenditures with existing and future stable levels of reserve funding. Heritage Grand’s application considers:</p> <ul style="list-style-type: none"> <li>• current and future local costs of replacement</li> <li>• 2% annual rate of return on invested reserves</li> <li>• 2% future Inflation Rate for estimating Future Replacement Costs</li> </ul> <p>Sources for <i>Local Costs</i> of Replacement: RA’s proprietary database, historical costs and published sources, i.e., R.S. Means, Incorporated.</p> <p>Certification: This <i>Full Reserve Study</i> exceeds the Community Associations Institute (CAI) and the Association of Professional Reserve Analysts (APRA) standards fulfilling the requirements of a “Level I Full Reserve Study.”</p> <p>Current practice is to update the study every 5 years (2025 is next revision year).</p>	<p><b>Yes</b></p>
<b>Services <u>NOT</u> Provided for ANY Heritage Grand Homes:</b>	
Grass, Front Yard (replacement need caused by overwatering or underwatering; or failure due to excessive shade caused by tree canopy management failure)	<p><b>NOT paid through Dues</b></p>
Dead Plants Replacement (front or back yards)	
Tree Pruning and Canopy Management in Residential Yards (Exception: A six foot clearance is HOA-maintained under front yard trees for yard crew access)	
Patios, Decks, Pergolas, Pools, Sheds, etc. (regardless of whether installed by current or previous homeowner)	
Heating, Ventilation, & Air Conditioning Systems (HVAC) including drains, pans; Auxiliary Generators	
Exterior Lighting (fixtures, bulbs, etc.)	
Garage Doors	
Pest Control (vermin, termites, ants, etc.) inside or outside (except mosquitos)	
HOA-owned property if damaged by homeowner non-compliance with R&Rs	
Items considered a “house construction defect” (there is no HOA-warranty)	
James Hardie (cement board) exterior siding repair and replacement if damage is due to homeowner negligence	
Roof Leaks at roof penetrations	
Driveways, sidewalks on residential property	

Note 1. For specifics of these amenities, see Heritage Grand's governing documents.

Note 2. Back yard maintenance is the responsibility of the homeowner. This can be homeowner-contracted with the front yard crew for an additional fee.