

**CONGRATULATIONS!**

*From all of us!*



**WELCOME TO THE BOARD**

**HERITAGE**  

---

**PROPERTY MANAGEMENT**

# New Board Member Frequently Asked Questions

## *Overview*

Congratulations on your position with the Board of Directors! We appreciate your desire to serve your community and know that your time as a volunteer is valuable. As your proud partner, we are excited to help make this the most productive year possible!



Although you may have already interacted with Heritage as a homeowner, many new board members are not aware of all the resources we have available for the community leaders. This document is designed to orient you with our structure and some of our most important tools. Our support system is vast and includes industry experts, dedicated departments and a wealth of knowledge. Our goal is to help your community thrive, while making board work easier!

## *Where can I find information and best practices?*

Communication has never been easier with our new online resource center. Articles, manuals, and hyperlinks to useful websites or educational videos are all categorized by subject. Here you will find information on everything from water sub-metering to reserve studies. Reading our “Guidelines for New Board Members” and “Code of Ethics” articles make a great first step.

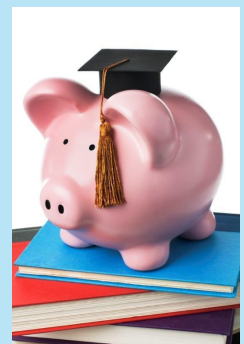


## *How do board members stay informed?*

In addition to our Resource Center, Heritage proactively sends a Board Update via email once a month. Please be sure we have the correct address on file and open each communication as soon as possible. Here you will find educational materials and opportunities to give us feedback, so that we can improve our service to you. In addition, we often host special events throughout the year. Board Updates are your opportunity to RSVP and many sessions will sell out!

## *Are there FREE Educational Opportunities?*

We offer complimentary Board Training Classes LIVE at our Corporate Headquarters: 500 Sugar Mill Road, Building B, Atlanta, Georgia 30350. This is one of the best ways to make the most of your partnership with Heritage. Topics include new board member training, budget analysis, covenant violations and reserve fund investment. All programs are taught by experienced professionals and include a manual and a delicious meal! Look for these announcements and sign-up sheets throughout the year!



# Support *Systems* & Suite of *Services*

Transparent Web Portals  
Education and Training

## *How are the financials handled?*

**BB&T**

Heritage posts all financials by the 15th of the following month. As a Board Member you will have access to bank statements, paid invoices, income statements and balance sheets. Heritage also works closely with the board on the budget, identifying opportunities for income and savings!

## *How is Heritage structured?*

The Board has one point of contact in their community manager; however, they are supported by a Division Manager, and a Vice President of Property Management, and several specialty teams standing by to assist our customers! Our departments include Client Services, Leasing, Closing, Insurance Negotiation, Project Management and Maintenance, just to name a few. A wide variety of experts provide accuracy and piece of mind.



## *What is our Service Level?*

The service level each Association enjoys is the community's personal choice as selected by the Board of Directors and ranges from accounting only to an on-site staff. Utilizing all the resources available is often key in the success of our partnership. We have a number of optional programs that can enhance your community's financial position, improve the appearance of the neighborhood and make board work easier. Everything from lease monitoring to construction is available and participation is 100% optional. **Some of these programs have NO COST to the Association!**



## *How does the web portal view change?*

We house our work flow in a comprehensive web portal called “**Heritage EDGE**”, allowing our boards access to most information 24/7. This transparency lowers the amount of phone calls and emails, making day to day activities easier for both the Board Members and our team.

**Although you may have already used EDGE in the past to pay your assessments, as a Board Member it is important to understand that your view and security level will be changing, instantly allowing access to the all community's archived information.**





# New Board Members

## *Five Steps to Success*

*Your satisfaction is our #1 concern.*

*The steps below should help set the stage for a great start!*

### Step #1

Take a moment to learn about the history of your property management company, and our full line of products, while considering your current service level and community needs.

[Click HERE to view the Heritage Brochure and our Menu of Services.](http://www.heritageproperty.com/heritage-brochure-and-menu-of-services/)

Go to: <http://www.heritageproperty.com/heritage-brochure-and-menu-of-services/>

### Step #2

Check out our online library with articles on a variety of topics including best practices for new board members, board code of ethics and traditional descriptions of elected positions.

[Click HERE to be connected to our complete Resource Center.](http://www.heritageproperty.com/resource-center/)

Go to: <http://www.heritageproperty.com/resource-center/>

### Step #3

Open your monthly Board Updates as soon as possible for educational materials. Sign up via available links throughout the year for educational classes that interest your Board of Directors.

[Click HERE to see samples of prior Board Updates.](http://www.heritageproperty.com/board-updates-archived-2/)

Go to: <http://www.heritageproperty.com/board-updates-archived-2/>

### Step #4

Understand what community information is available on Heritage EDGE and be sure you have a working log-in and password. Training videos are also available.

[Click HERE for Heritage EDGE & Advanced EDGE Training Videos](http://www.heritageproperty.com/heritage-edge-information-and-training-videos/)

Go to: <http://www.heritageproperty.com/heritage-edge-information-and-training-videos/>

### Step #5

Contact your property manager with any questions or concerns regarding your Association.

Office hours are 8:30A.M. - 5:00P.M. For assistance with log-in information, passwords or orientation materials you may contact our client service department directly at 770-200-8263.

Reach our team via email: at [ClientSvc@heritageproperty.com](mailto:ClientSvc@heritageproperty.com)



#### **Heritage Property Management**

**Corporate Office:**

500 Sugar Mill Road, Bldg. B, #200 Atlanta, GA 30350

**Contact Us: (770) 451-8171**

**South Metro Office:**

805 East Lanier Avenue, Suite C, Fayetteville, GA 30214

**[www.heritageproperty.com](http://www.heritageproperty.com)**