

MENU OF SERVICES

HERITAGE
PROPERTY MANAGEMENT

Step by Step Process



At Heritage, we understand that the process of selecting the right company and the most appropriate service level can be confusing. This booklet is designed to help give your board the tools it needs to easily understand the options and make the best decision for your community.

1

Review General Service Levels

Understanding the basic categories of service levels common within the industry, which are Accounting, Accounting & Covenant Enforcement, Portfolio and Part-Time/Full Time On-Site Management, is a great way to get started in determining your neighborhoods needs.

2

Review Our Company's List of Services

Heritage has a number of standard services, a number of optional services and a number of complimentary services. Every program is detailed in this booklet and the table of contents allows you to locate areas of particular interest with ease.

3

Review Our "Services-at-a-Glance" Spreadsheet

A separate document is available that allows the Board to quickly and easily identify what services are included at each basic level. This review, along with a budget analysis should help establish minimum requirements for the proper management of your community.

4

Select or Customize your Service Level

We understand that every neighborhood is unique and as a result custom contracts are available. Our goal is to meet your community's needs and use your management budget wisely.

5

Select Your Optional Services

Many optional services present industry-leading solutions to common problems or generate special unexpected benefits. Some are unique to Heritage and many programs have NO COST to the Association!

Levels of Service



Financial Services

Financial or “*Accounting*” Services are designed to relieve the Board of Directors of many day-to-day activities involving accounts payable, accounts receivable, budgets and collections.



Financial & Covenant Compliance Services

Financial and Covenant Compliance Services, often referred to as “*Accounting Plus*”, includes all the services in the financials package as well as board-initiated covenant enforcement communication.



Portfolio Services

Portfolio management includes all the services in the Accounting Plus package and adds visits to the property for site inspections, board or annual meeting attendance, and vendor management.



On-site Management Services

On-site Management includes all the services of Portfolio Management and adds a part-time or full-time presence on the property for associations requiring more individualized attention.



Optional Services

Heritage offers a number of ancillary services to simplify your operations, save your Association money or provide unique benefits. These programs may or may not have a cost to your Association.



Complimentary Service

Heritage offers a number educational services as well as value added services at NO-CHARGE to the Association.



Important Note

This booklet is an overview of Heritage’s available services. Please see your community’s proposal for details on the exact scope of the services provided, as well as pricing. Custom packages are available.

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Ask about our "Services-at-a-Glance" Spreadsheet

This comprehensive document allows the board to quickly reference which services are included at each level and make decision making easier!

Heritage Team

Corporate Structure

There are so many moving parts to each property and Heritage knows that the centralization of responsibility reduces errors and improves customer satisfaction.



All Associations have a community manager assigned as a central point of contact. The role's primary function is to act as a liaison between the board and a number of well-staffed departments, many of which function in the background. Your representative leads the team; however, he or she is only one part of the elaborate support system in place for your community.



As one of the largest privately-held management companies in the country, our clients also enjoy a strong corporate leadership team. This structure allows us to implement changes quickly and design industry-leading solutions that have gained national attention.

- Some of the lowest ratios of properties to managers in the industry
- Management teams include a Manager, a Division Manager and the Vice President of Property Management
- Management teams are able to leverage specialized departments
- Management department is supported by the corporate team
- All team members undergo background checks and drug screening



**All communities have a dedicated property manager.
All communities have access to specialty departments.**

Online Services

Transparent Web Portal



Heritage maximizes efficiency through Vantaca. Boards and homeowners can view real time account status, pay assessments through a variety of methods, and enjoy 24/7 access to virtually all association-related information.

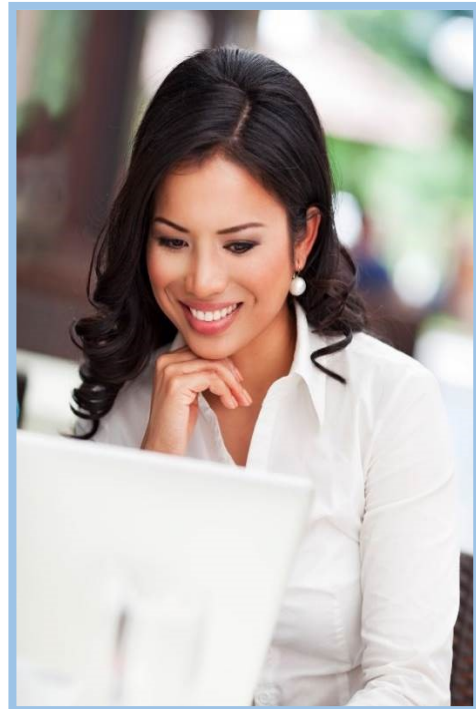
The Board of Directors sets the security levels on everything from financial records to community calendars protecting information and determining which documents and data the homeowners will be able to access!

Online Record Access

- List of owners
- Association governing documents
- Compliance correspondence
- Financial reports & bank statements
- Images of all paid invoices
- ARC requests and status
- Archive of all broadcast messages
- Community calendars

Online Account Access

- Individualized log-in information
- Homeowner account status
- Multiple online payment options



Systems are backed up DAILY.

Call for access to the video presentation of Vantaca



Vantaca is required with every service level.
A small monthly fee is based on the option selected.

Educational Services

Understanding industry standards and best practices is critical to the success of any Board. Heritage University™ is a broad term used to describe the many educational opportunities offered by our company.

Resource Center

Information is only a click away 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 material on everything from water sub-metering to reserve studies. Our guidelines for new board members are a great place to start along with the general descriptions for each member's position.



All of these materials are offered at NO charge to the Association!

Monthly Board Updates



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 current articles and opportunities for feedback. In addition, we often host classes throughout the year. Board Updates are your opportunity to RSVP and many sessions will sell out!



Educational materials are always complimentary.

Educational Services

Board Training Sessions

In addition to our Resource Center and Board Updates, new and existing board members, committee members and EVEN homeowners can enjoy a wealth of information when they attend one of our Board Training Sessions LIVE at our corporate headquarters in our redesigned educational center!

The knowledge gained in these classes helps volunteers build a foundation of how associations work and how to use their time most effectively. Each complimentary session includes a training manual and allows you to interact with other community board members. Topics include best practices for new board members, reserve studies, budget analysis, board code of ethics and covenant enforcement, just to name a few.



Sessions are complimentary!



- Multiple classes are held annually
- Programs cover a variety of topics
- A delicious meal is always included
- Sessions include a training manual
- Sign up through your Board Updates
- Classes are taught by experienced professionals
- Evening and Saturday morning sessions available

Education Center Location

500 Sugar Mill Road, Building B, Atlanta, GA 30350



Educational classes are always complimentary.

Financial Services

Banking Administration

Heritage handles all our banking through BB&T. Our team manages the checking accounts and relieves the board of the day-to-day banking activities.



- Maintain operating accounts
- Record all transactions
- Reconcile bank statements
- Online access to bank statements
- Open interest-bearing accounts
- Handle all bank correspondence
- Dedicated financial management team

We offer 24/7 online access to financial reports, bank statements and invoices!

Financial Reporting

Timely and accurate reports disclose to the Board, and to the community, actions taken to make the Association cost-effective and financially secure. At Heritage, we utilize a CPA-led accounting team and have built our reputation on sound fiscal management.

- All customary financial reports
- Monthly balance sheets
- Monthly income/expense statements
- Archive financials online by the 15th
- Year-to-date expense statements
- Assist with year-end audits



**Banking Administration is included in all our packages.
Financial Reporting is included in all our packages.**

Financial Services

Accounts Receivable

Our accounts receivable is centralized in a lockbox system. Homeowners can access their personal balances 24/7 through our web-portal and are provided multiple payment options, and the board will have complete access to delinquency reports and account history.

- Multiple payment options
- Invoices and coupons books
- Invoices for special assessments
- Process all fees paid to the Association
- Maintain a per-unit accounting history
- Maintain online account balances
- Online portal for homeowner accounts



Accounts Payable

Our accounts payable is also centralized in a lock box system. Managers are able to quickly and easily approve invoices, and checks are processed every day. Scans of all paid invoices are easily accessible 24/7 through our online portal.

- Process vendor invoices
- Facilitate timely payments
- Manage all receipts/disbursements
- Records all cash disbursements
- Record retention of vendor insurance
- Record retention of W9 forms
- Labor/materials lien releases
- IRS 1099 and 1096 forms
- Checks processed daily
- Images of all paid invoices



Accounts Payable and Accounts Receivable services are included in all our packages.

Financial Services

Payment Options

Heritage offers many convenient payment options for your homeowners, regardless of how they prefer to handle their dues and assessments! All forms of payment have no cost with the exception of credit card payments which require a processing fee. Homeowner real-time account balances are available online.

- Check & Money Order
- Auto debit & E-check
- Credit Cards Accepted
- Pay at any BB&T Location
- Online payments



Delinquent Accounts

Heritage handles all actions associated with delinquent accounts from the initial late letters to payment plans and coordination with legal counsel.

- Apply late fees, charges and fines
- Process and handle delinquency notices
- Suspension of access letters
- Real time delinquency reports
- Administer payment plans
- Transfer files to legal counsel
- Interact with attorneys for collections
- Attend court proceedings upon request
- Coordinate appeals on behalf of homeowners



A COLLECTION POLICY establishes fair and consistent guidelines that give our accounting team direction and treats all homeowners equally.

A BOARD CODE OF ETHICS sets standards that protect private information.



Payment Options, Delinquent Accounts, and assistance with establishing Collection Policies and a Code of Ethics are included in all our packages.

Financial Services

Budgets & Taxes

Heritage has built its reputation on sound fiscal management.

At the heart of everything we do is balancing the annual budget, protecting reserves, and helping to maintain positive cash flow.

- Annual budget preparation
- Cost saving recommendations
- Reserve analysis and coaching
- Interact with year-end auditors

Save for a Rainy Day!



RESERVE STUDY ASSISTANCE

A key component in budget analysis is establishing proper reserves. The Reserve Study report must be prepared by an engineering firm. Heritage advocates and assists in the coordination of these reports when needed.

LOAN ORIGINATION

A balanced budget is a primary goal; however, on occasion capital improvements, maintenance or emergencies call for short or long-term loans. Heritage can assist in handling all the paperwork and facilitate preferred rates.

TAX RETURNS

Every association is a “Non-Profit” Corporation and as such has registration requirements and must file an annual tax return.

- Georgia Secretary of State annual filings
- Issue vendor related forms required for tax returns
- Prepare documents and assist accounting firm preparing return



Annual Budgets, Reserve Study, Tax Assistance and Loan Originations are included in all our packages.

Administrative Services

General Communication

A dedicated customer service team handles all correspondence via USPS, certified mail, UPS and Federal Express, as well as all phone calls and e-mails in a timely and efficient manner.

- Distribution of welcome letters
- Distribution of all general correspondence
- Online calendar of events/role-based security
- Online surveys and sign-up sheets



Broadcast Messaging

A reconciliation process will allow Heritage to identify which homeowners do not have an email address, generating printed mailings only when necessary, saving the association money!



- Community-wide broadcast messaging
- Emergency and non-emergency updates
- Selective messaging to specific groups

Record Maintenance

- Maintain an owner database, including all contact information
- Digitize and archive governing documents
- Prepare, distribute, and archive non-compliance letters
- Prepare, distribute, and archive broadcast messages
- Archive budgets and other financial data
- Archive paid invoices and vendor information
- Archive architectural requests and decisions
- Web portal set-up and physical record storage



General Correspondence, Broadcast Messaging and Record Maintenance are included with all our packages. There is a minimal monthly storage fee.

Administrative Services

Amenities Reservation

- Manage clubhouse, tennis court and other amenities reservations
- Collect and reimburse amenity rental deposits
- Maintain amenities reservation calendar with 24/7 online access
- Facilitate reservation agreements with homeowners
- Online access to calendar of reservation availability

Access Cards

- Facilitate audit of existing gate database for the Board of Directors
- Activate and deactivate access devices for delinquent homeowners
- Facilitate changes in devices and provide additional devices
- Issue key fobs and gate changes as needed for new owners

Dedicated Client Service Center

Our local Client Service Center handles numerous phone calls and emails relating to many different issues such as access cards, clubhouse rentals and much more, allowing immediate resolution to many homeowner questions.

This entire team functions as one unit. Although the managers do have dedicated assistants for each property, the majority of all information is available in our system, allowing any team member to assist any of our customers at any time.



Amenity Reservations are included in Accounting Plus and above. Access Card assistance is included in all our packages.

Closing Services

Mortgage Documents

To facilitate the consistent and timely delivery of closing-related information, Heritage Property Management has established a designated department that specializes in all the needs associated with a transfer of ownership.

- Dedicated closing department
- Record changes in ownership
- Account balance invoices
- Final balance reconciliation
- Update and prorate accounts
- Administer final account balances
- Customized closing letters
- Mortgage questionnaires
- Foreclosure paperwork
- Supporting documents

HOMEOWNER RECORDS: As homes are sold, Heritage will receive confirmation of the successful closing. The change of ownership initiates a step-by-step process wherein all documentation is recorded in Vantaca ensuring that the board has accurate homeowner records at all times.

Welcome Packages

As new owners enter the community a welcome package is generated introducing them to their management company and their community. These packages can be customized by the board. Homeowners can request closing letters or mortgage lender questionnaires directly on the Heritage website.



**Closing Services are required in all our packages.
There is never a cost to the Association for this service.**

Insurance

Insurance Procurement

Adequate insurance is crucial for any association and is a requirement for all our properties. At Heritage, we can help determine whether your community has proper coverage. A review of your community's property and liability insurance is handled during the transition process. In addition, our team checks for current Director's and Officer's Insurance, a separate policy that protects the board members in the event of a lawsuit. At any time, Heritage can procure insurance quotes for any of our communities upon board request.

Insurance Claim Administration

The administration of an insurance claim requires specialized expertise. Recognizing this, Heritage has established a dedicated insurance claim administration team that has years of experience dealing with adjusters and knows how to investigate and administer a loss, giving the board peace of mind that your association will be taken care of properly. When a loss occurs, our first step is to determine if the damage even merits involving the carrier. We have saved our associations thousands in increased premiums by correctly assessing the situation, estimating the repairs and recommending the appropriate action.

- Insurance claim coverage analysis
- Insurance claim consulting
- Loss reporting
- Estimates from preferred vendor
- Liaising with the insurance carrier
- Settlement negotiation



Insurance procurement and claim administration is included in all our packages.

Property Services

Property Inspections

Our team can perform common area inspections and covenant compliance inspections ensuring homeowners and vendors are maintaining the community properly. Architectural requests are also handled through our office.

- Perform regular on-site property inspections
- Perform covenant enforcement inspection
- Issue non-compliance letters
- Apply fines for non-compliance
- Online access to all non-compliance letters
- Handle all homeowner communication regarding non-compliance issues
- Common area and vendor work inspections
- Coordinate with city and county authorities on maintenance items



Architectural Requests

- Handle modification requests by homeowners
- Online standards, application, and status of all requests
- Provide responses to requests as directed by the board
- Online board access to all homeowner correspondence



THANK YOU NOTES: A note of appreciation goes a long way in helping the homeowners view the board and the management company as their partner. Thank you cards can be sent those homeowners who consistently maintain their property beautifully.



Inspections are included at portfolio level or above.
Architectural Control is included in Acc. Plus or above.

Property Services

Annual & Board Meetings

All communities conduct annual meetings and Heritage is involved in much of the process for all of our Associations. From preparing and distributing the budget in a timely manner to distributing and collecting proxies.

- Meeting scheduling
- Meeting location booking
- Annual meeting notifications
- Ballots and proxies
- Absentee voting mechanisms
- Post meeting minutes online
- Preparation of meeting agendas
- Present annual management reports
- Present annual financial reports and budgets



IS MEETING ATTENDANCE INCLUDED?

Although a number of responsibilities for board and annual meetings are included at all levels of service, traditionally meeting attendance is found in portfolio level and above; however, this is an area many associations choose to customize. Board meetings can occur quarterly or monthly for example, and some associations with accounting only packages request a Heritage representative for their annual meeting.

Emergency Services

Our emergency call center is available **24/7**

*Although all associations have access to this number, some packages have limited services when the call arrives.



Meeting attendance is included at the Portfolio level and above and frequency is customized.

Vendor Management

Vendor Bids and Contracts

Heritage holds our vendors to the highest standards through the **HERITAGE VENDOR NETWORK**, a preferred vendor program that evaluates company performance, pricing and reliability. Our team can handle the process of soliciting bids, awarding contracts and monitoring the quality of the work for everything from pool service to reserve studies.



- Provide vendor recommendations
- Procure bids and award contract
- Collect W-9s & vendor insurance
- Assist in evaluation of bid quality and alternative solution
- Maintain records of bids, invoices and payments made to vendors
- Monitor quality of workmanship

BULK NEGOTIATION: On occasion, Heritage will use economies of scale to facilitate a bulk negotiation with popular vendors. We will alert your community if they qualify and participation is 100% optional.

Project Management

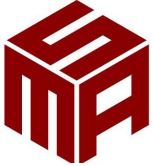
Although we coordinate all the traditional needs of a community, there are some projects that require the coordination of multiple trades and may be beyond the scope of the agreement. In those cases, a project manager with experience in the construction industry may need to be selected by the board.



**Vendor Management is included at the Portfolio level.
Vendor Management is available for Accounting Plus.**

Collection Agency

Magnum Association Services, Inc.



Magnum provides a **NO COST** and **NO RISK** solution as the association's first line of defense against delinquent accounts.

WHY IS USING A COLLECTION AGENCY IMPORTANT?

Magnum reports to all three credit bureaus which often motivates payment from homeowners who would otherwise remain delinquent. The service can also be used on smaller amounts, often eliminating the need for attorneys.



DOES THE ASSOCIATION RECEIVE ALL OF THE MONEY OWED?

YES! All the costs associated with the collection efforts are placed on the delinquent homeowner's account. The association is never responsible for any fees even in the event of a bankruptcy!

WHAT IS THE HERITAGE A.C.T. PROGRAM?

The Heritage **A**ssessment **C**ollection **T**ransfer Program allows the entire process to be turn-key for the boards. Collection policies are completed and delinquent files can automatically transfer to Magnum.

- **NO COST** and **NO RISK** to the association
- All fees are placed on the delinquent homeowner's account
- Ability to report to the credit bureaus
- Collection efforts continue for 100 days
- Association can ACT when balances are small
- Association receives entire amount due



Collection Example

<i>Amount due Association:</i>	<i>\$1,000</i>
Transfer Fee	\$96.00
Collection fee (25%) (\$1,096x 25%)	<u>\$274.00</u>
Total	\$1,370.00
Homeowner is billed	\$1,370.00
<i>Association Receives</i>	<i>\$1,000</i>
Magnum Receives	\$370.00



Collection agency services are available to all our clients at **NO** charge and **NO** risk to the association.

Construction

Heritage Construction & Maintenance

Heritage Construction and Maintenance Company (HCMC) is a full service, in-house construction and maintenance organization. Currently, HCMC boasts a staff of more than twenty-four W-2 full-time employees and a fleet of a dozen vehicles. By utilizing GPS and cutting-edge dispatching technology, HCMC is able to respond to service requests quickly and reliably.



HCMC is a State of Georgia Licensed Contractor.

Our team includes a trained architect and experienced project managers with over \$300 million dollars in completed projects. Our staff receives on-going OSHA safety training as well as trade-specific education.

- Fleet of marked vehicles and uniformed technicians
- Dedicated dispatch office with GPS tracking system
- All team members have background checks and drug screenings

General Contracting & Project Supervision

- Design/Build Projects
- Clubhouse Design/Remodel
- Retaining Walls
- Drainage Projects
- Roofing Projects
- Monument Signs/Fences
- Amenities Design/Repair
- Pool Design/Repair



Heritage Construction and Maintenance (HCMC) is an optional service.

Maintenance

Preventative Maintenance

Designing and implementing a preventative maintenance program can save the association thousands over time, handling smaller items while they are still small! This is a very popular choice for condominiums and aging buildings and helps to create a more predictable annual budget.

- Turn-key process for all of property maintenance needs
- Stay in compliance with building codes & safety regulations
- Custom plans designed to fit your needs and your budget

Winterization



Winterizing property is not just for swimming pools. A comprehensive plan will help preserve equipment and lessens the likelihood of serious damage to property. Ice melt deliveries are also available.

Janitorial Services

Jobs can be small or large, occasional or contracted.
Custom plans are created to suit your needs!

- Floor Care Services
- Carpet Cleaning
- Stone and Marble Care
- Window Cleaning
- Amenities Cleaning
- Pressure Washing



HCMC is also available for Emergency Services.



Heritage Construction and Maintenance (HCMC)
is an optional service.

Right of Entry

Broadband Planning

Heritage uses economies of scale whenever possible to assist our associations. Through our long-time partner, Broadband Planning, we have successfully bulk negotiated numerous advantageous right-of-entry agreements.

WHAT IS A RIGHT-OF-ENTRY AGREEMENT? The cable companies will pay associations for the ability to access their property and have advertising *priority* (not exclusivity); however, boards are often not aware of their rights, and settlements are far larger when negotiated in a group of communities.

- Over \$2,000,000 has already been delivered!
- Agreements are **NON-EXCLUSIVE**, homeowners can select any provider
- Agreements do not affect what homeowners pay for service
- Funds can be used for much-needed capital improvements or reserves
- Individual checks often exceed tens of thousands of dollars

Millions of Dollars in Found Money!

WHO QUALIFIES FOR PAYMENTS?

Common structural elements found in townhomes, condominiums or single family homes with private streets are a requirement. In addition when an Association can qualify for this benefit varies. Heritage monitors opportunities annually for all our properties and presents offers to the board.



All service levels automatically receive offers if the property qualifies. Participation is 100% optional.

Lease Monitoring

Heritage Effective Leasing Program

Maintaining control of the leasing activity within a community is a crucial component of protecting and enhancing property values. An overabundance of leasing can damage the value of a given community and diminish the overall success of an association as well. It is for this reason that Heritage is proud to offer the Heritage Effective Leasing Program (H.E.L.P.).



H.E.L.P offers a completely robust and unique approach to handling this growing problem. Enrollment is always separate and optional and the program can be implemented in a variety of ways.

- Administration and monitoring of the leasing activity within the community
- Maintain an accurate database reflecting owners leasing their unit(s)
- Maintain a database reflecting tenant names and contact information
- Monitor lease expiration dates
- Generate, distribute and archive monthly leasing reports
- Create and maintain leasing waiting lists
- Assistance with establishing a community-wide leasing policy
- Create a distribution list aimed specifically at tenants

WHO PAYS FOR THIS SERVICE? Although the cost is billed to the Association, some governing documents can allow the modest fee to be passed through specifically to the homeowners who are actually leasing out their home.

This approach can result in **NO COST to the Association.**



This is an optional service regardless of the package selected and often has NO COST to the Association.

Sub-Meters

Apex Billing Integration
Is your
WATER FLOW
hurting your
CASH FLOW?



WHAT IS WATER SUB-METERING?

In many townhomes and condominiums, the Association is responsible for the total water bill and those expenses are shared equally among the residents, often causing some homeowners to subsidize their neighbor's utilities and hurting the community's overall financial position. Installing individual meters that monitor and bill for usage solves many problems.



- Reduces waste by 30%
- Easily identifies leaks
- Equitable distribution of costs
- Increases cash flow

WHAT IS BILLING INTEGRATION?

Once meters are in place, or for those communities that already use the Apex system, we offer yet another benefit to help our customers. Instead of the association relying on reimbursement from Apex, homeowner payments for water usage can now be applied immediately and deposited directly into the association's account through Heritage, creating an even greater positive effect on the community's cash flow position. Boards can also track all accounts receivable, both water and assessments, in one ledger!



Water sub-metering and billing integration is optional and is offered at **NO CHARGE** to the Association.

Heritage Team

Transitions

HOW IS THE TRANSITION HANDLED?

The transition process is handled by a dedicated team who works in conjunction with the prior management company or the board in the case of self-management. Heritage normally requests approximately thirty days to facilitate a smooth transition. A detailed agenda of the process is available.



HOW IS THE MANAGER SELECTED? Together with the Executive Team, a Manager is carefully selected. The community needs, action item list, board personality and workload are all considered during this process in an effort to achieve a successful and long-lasting relationship with your new representative.

Satisfaction Guarantee

Although we make every effort to be sure the manager we have selected is the best fit possible for your community, ultimately the board's satisfaction is our #1 concern. If for any reason the Board is unhappy with the manager chosen, we will do all that is needed to ensure your total satisfaction, up to and including reassigning your property to a new Heritage representative.

We have enjoyed **95% client retention** for many years. Our philosophy is quite simply “to do the right thing”. Our priority is to secure a long-term partnership with your community through systems and accountability that will lead to consistent and exceptional service.



All communities require a transition. There is a charge equal to one month's management fee for the process.



Schedule a complimentary presentation today!



HERITAGE
PROPERTY MANAGEMENT

Heritage Property Management

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