

**CCOA BOARD OF MANAGERS PORTFOLIO  
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## CCOA BOARD 101

The presentation/discussion today is primarily a number of suggestions based on what has worked well in the past.

1. Prioritize action items (Association comes before individual member's concerns)

Work **S.M.A.R.T.** SMART goals are

Specific  
Measurable  
Attainable  
Relevant  
Time-bound

2. Communications – Check/respond to emails at least every other day

**Share the load.** Assign a member to follow-through & communicate as needed.

Ask members to make requests in writing through the office (this can be email).

3. KNOW the Governing Documents – especially the Bylaws and Park Rules & Regulations

4. The Board is NOT the Police.

The Board only has authority over the affairs & common areas of the association. A good deal of the complaints received from owners are really legal affairs best dealt with by the authorities.

**Ex. 1** A dog bites a member. If **proven** that the dog is off leash and on community property the only thing the Board can do is fine the owner. The rest is a legal matter between the involved parties. (See page 15 of the Condo Dec for getting rid of unruly pets.)

**Ex. 2** Lot line disputes

**Ex. 3** Suspected drug use/dealing

5. Enforce Bylaws, Policies, etc. with objectivity and **consistency**.

If a member has a complaint, insist they report compliance issues in writing & sign the form. (Signed forms/complaints are confidential.)

If a member is not willing to sign a form, then it must not be that important.

Forms for owners to report violations are available in the Lodge and on the CCOA website.

Some Bylaws/Rules are nearly impossible to enforce

(Do you have a radar gun & know how to use it? Do you have a cancelled check made out to the owner of a unit occupied by a tenant showing it as rent?)

6. Rumors are exactly that and can divide the community. **Know the facts.** A handy phrase can be something like: "That has not been my experience." or "That has not been proven to me."

## CCOA BOARD OF MANAGERS CALENDAR

### JULY:

- General Membership Meeting Saturday closest to the 4<sup>th</sup> of July
- Organizational meeting to elect officers within 10 days following the election (Article III.4.E)
  - Also determine committee liaisons & authorize 2 Board members to communicate with lawyers
- File Bylaws at Chaffee County Courthouse within 30 days (only if amended) (Article I.4.C)
  - Check with the County Clerk for margin requirements
- Distribute amended Bylaws to all owners within 30 days of ratification of the vote (Article I.4.C)
- Finance Committee Liaison meet with committee chair early in the month to be sure the budget process has started
- Review Budget & Adjust if necessary (Late July or Early August)
- Post 2<sup>nd</sup> Quarter Balance Sheet and Profit & Loss Statements

### AUGUST:

- Board meeting
  - Announce at least 3 days prior with agenda (CCOA Conduct of Meetings Policy)
- Prepare for Labor Day weekend General Membership Meeting
  - Adopt the next year's budget
    - The Finance Committee will present their suggested budget
    - Discuss/modify (if needed)/vote
  - Prepare budget documents to be sent out with meeting notice
  - Prepare General Meeting agenda
  - Prepare PowerPoint presentation (if desired)
- Mail or hand deliver meeting notices no more than 50 or less than 10 days prior to the September General Membership Meeting (CCIOA pg 62)
  - Meeting notices must include time, place agenda items & any budget changes
    - This mailing must include the budget adopted/proposed by the Board
  - Post in conspicuous place & on website

### SEPTEMBER:

- General Membership Meeting Saturday closest to Labor Day
  - Budget vote at the meeting [CCIOA pg 51 (4)(a)(I) ]
  - Appoint/Fill committee vacancies (You may want to move this to May in 2021)
  - Vote on changes, if any, to the Schedule of Fines
- Read electric meters and send to Genesis no later than the 23<sup>rd</sup> of the month
- Notify company to return trash service to every-other-week starting October 1

## **MAY:**

- Board Meeting
- Finalize General Meeting Agenda
- Finish vetting amendment proposals & signatures (treasurer & elections liaison)
- Vet any additional Board Nominations (treasurer & elections liaison)
- Order roll-offs
- Mail or hand deliver May meeting notices no more than 50 or less than 10 days prior to the May General Membership Meeting (CCIOA pg 62)
  - Meeting notices must include time, place agenda items & any budget changes
  - Post in conspicuous place & on website
- May General Membership Meeting the Saturday closest to Memorial Day
  - Introduce Board candidates
  - Present any amendments to the Bylaws, Architectural Codes, Park Rules & Regulations
  - Appoint or ratify any committee changes

## **JUNE:**

- Board meeting or work session
  - Prepare for July General Membership Meeting
- Develop General Meeting Agenda
- Mail or hand deliver July meeting notices no more than 50 or less than **30** days prior to the May General Membership Meeting (CCIOA pg 62) [Because this mailing includes ballots, they need to go out at least 30 days prior to the date they are due.] (Article I.4.C)
  - Meeting notices must include time, place agenda items & any budget changes
  - Post in conspicuous place & on website
- 2nd quarter meter readings to Genesis by 20<sup>th</sup> of the month

## BOARD ORGANIZATION

### Excerpts from Article V: OFFICERS

1. DESIGNATION – The Officers of the Association shall be President, Vice-President, Secretary, and Treasurer, all of whom shall be elected by and from the Board of Managers. The remaining three (3) elected board members shall serve as Members at Large.
2. ELECTION OF OFFICERS – The Officers of the Association shall be elected annually by the Board of Managers at the organizational meeting of each new Board and shall hold office at the pleasure of the Board. One person may hold concurrently any two (2) offices, except that the offices of President and Secretary may not be occupied concurrently by the same individual.
4. PRESIDENT – The President shall be the Chief Executive Officer of the Association. He/She shall preside at all meetings of the Association and of the Board of Managers. She/He shall have all of the general powers and duties which are usually vested in the office of President of an Association.
5. VICE PRESIDENT – The Vice-President shall have all the powers and authority to perform all the functions and duties of the President in the absence of the President or his/her inability, for any reason, to exercise such functions or perform such duties.
6. SECRETARY - The Secretary shall keep all of the minutes of the meetings of the Board of Managers and the minutes of all meetings of the Association. He/She shall have charge of such books and papers as the Board of Managers may direct, and she/he shall, in general, perform all the duties\* incident to the office of Secretary.
7. TREASURER\*\* – The treasurer shall have responsibility for Association funds and shall be responsible for keeping full and accurate accounts of all receipts and disbursements in books belonging to the Association. He/She shall be responsible for the deposit of all monies and other valuable effects in the name and to the credit of the Association in such depositories as may from time to time be designated by the Board of Managers.
  - A. WITHDRAWAL OF FUNDS
    - i. Withdrawal of funds shall be made with checks or a credit/debit card approved by two (2) Officers, or
    - ii. Withdrawal of funds shall be made by the Treasurer with an invoice approved with a written signature by another Board Officer, or
    - iii. Immediate payment requests for invoices require written approval of the invoice by the Treasurer and one (1) other Board Officer, at which time the withdrawal by check can be made. Invoices may be e-mailed, faxed, or hand carried for second authorization.
  - B. PAYMENT OF BILLS - The Treasurer shall be responsible for paying all bills received by the Association from the Association's funds.
9. COMMITMENT - Board members are expected to attend at least six meetings per year. A Board member who misses more than three meetings in a year may be subject to removal from the Board and may be replaced as provided above.

\* Please refer to the Secretary Duty Guidelines outlined in a separate document. Keep in mind this is an outline of specific things that need to be done. It is, of course, up to the Board to assist with these duties or delegate them to other members if so desired.

\*\* Collegiate Peaks Bank, now operating under Glacier Bank, in Buena Vista holds the CCOA Accounts.

Since the Board voted to hire a Treasurer/Portfolio, the Board member appointed to the Treasurer position primarily acts as the liaison to the treasurer and approves invoices and purchases. The Treasurer/Portfolio signs all checks, which are subject to the fore mentioned approval before being sent out. The President generally provides the second signature for approval of bills, etc. Genesis Tax & Accounting is the firm engaged by CCOA to maintain the financial records.

The President & Treasurer/Portfolio are currently the designated signatures on all CCOA bank accounts and each have limited credit/debit cards (\$2,000.00) to enable necessary day to day and online purchases for general supplies. It has been past practice that purchases over \$250.00 must be **preapproved** by two (2) Board members.

Derek Dietrich, Sewer Plant Technician, has a credit/debit card with a \$250.00 limit to purchase chemicals, general supplies and shipping of water samples related to the maintenance of the facility.

Any signature card changes must be designated in the Board minutes and accompany the request to the bank. Signees should be easily available if needed.

Please refer to the Treasurer Job Description outlined in a separate document.

2. POWERS AND DUTIES – The Board of Managers shall have the powers and duties necessary for the administration of the affairs of the Association, and for the operation and maintenance of Chateau Chaparral. The Board of Managers shall operate and execute their duties within the scope and limits of the Association's Governing Documents.

3. SPECIFIC POWERS AND DUTIES – The Board of Managers shall be empowered by the Association, and shall have the duties as follows:

A. To enforce the covenants, conditions, restrictions, easements, uses, limitations, obligations, and all other provisions set forth in the Condominium Declaration submitting the property to the provisions of the Condominium Ownership Act of the State of Colorado.

B. To enforce compliance with the Association's Governing Documents as may be necessary for the operation, use, and occupancy of Chateau Chaparral.

C. To keep in good order, condition and repair, all of the general and limited common elements used in the enjoyment of the entire premises.

D. To determine and collect, pursuant to the Condominium Declaration, the assessments to be paid by each of the owners toward the gross expenses of the entire premises and, as determined by majority of the votes cast by the Owners as provided in Article II, Section 1, to adjust, decrease or increase, the amount of the assessments. To remit or return, upon discretion, any excess of assessments over expenses and cash reserves to the owners at the end of each operating year. To levy and collect special assessments whenever deficits of the expenses over income arise in the operating or maintenance expenses or costs, or additional capital expenses, or because of emergencies. All assessments shall be in statement form and shall set forth the detail of the various expenses for which the assessments are being made.

E. To collect delinquent assessments by suit or otherwise, and to enjoin or seek damages from an owner as provided in the Governing Documents of the Association.

F. To protect and defend the entire premises from loss and damage by suit and otherwise.

G. To enter into contracts within the scope of their powers and duties.

H. To establish a bank account for the common treasury and for all separate funds which are required or may be deemed advisable by the Board of Managers. CCOA Bylaws Adopted 8/20/17 Amended 21 July 2018 Page 8 of 22

I. To keep and maintain full and accurate books and records showing all of the receipts, expenses and disbursements of the condominium property, and to permit examination thereof at any reasonable time by each of the owners, and to cause a complete audit of the books and accounts by a competent professional accountant every three years or as provided by law. The professional accountant will be selected/renewed by the Board following a bidding process.

J. To prepare and deliver quarterly, to each owner, a statement showing all receipts, expenses and/or disbursements since the last such statement.

K. Education i. Owner Education: The Association shall provide, or cause to be provided, education to owners at no cost on at least an annual basis as to the general operations of the Association and the Rights and Responsibilities of Owners, the Association and its Board of Managers under Colorado law. The criteria for

compliance with this section shall be determined by the Board of Managers.10 ii. Board of Manager Education: The Board may authorize, and account for as a common expense, reimbursement of board members for their actual and necessary expenses incurred in attending educational meetings and seminars on responsible governance of unit owners associations.

L. In general, to carry on the administration of this Association and to do all of those things necessary and reasonable in order to carry out the governing and operation of Chateau Chaparral.

M. If deemed necessary by the Board of Managers, to employ for the Association, a caretaker, and/or an office clerk, at a compensation established by the Board, to perform such duties and services as the Board shall authorize.

N. To obtain approval of the general membership for any capital expenditure for equipment or improvements of the Association, of two thousand five hundred dollars (\$2,500.00) or more. A simple majority of the votes cast is needed for approval. Expenditures for normal operation, replacement or repair of existing equipment or other routine expenditures may be approved by the Board.



## CCOA COMMITTEE DESCRIPTIONS/PURPOSES

The CCOA Bylaws provides for committees as follows:

**COMMITTEES** - In order to assist the Board of Managers, one or more committees of volunteers may be created as needed. The members of the committees must be in good standing with the Association. Committees will be composed of an odd number of members with no less than three (3) and no more than five (5). Committees may be revised on an annual basis. Committees must be approved by and report to the Board of Managers. The Architectural Committee shall be fully staffed (3 – 5 members) at all times. The Board shall have the authority to appoint members as needed. An Association member may be on no more than two committees at one time. Committee members shall meet the requirements in Article IV, Item 4, (Conflict of Interest and Nepotism).

i. The following committees shall be standing committees of the Association:

- a. Architectural
- b. Elections (must have three members at all times)
- c. Finance
- d. Capital Expenditures/Building & Grounds
- e. Bylaws

The CCOA Board of Managers (Board) has designated the following guidelines and purpose for the various committees:

### **GUIDELINES FOR ALL COMMITTEES**

- Each committee shall designate a chair-person or co-chairpersons to organize and direct committee meetings.
- Notes will be taken at each meeting and committee reports submitted when deemed appropriate. Reports will be posted to the Association website.
- A majority of the committee members must be present when decisions/recommendations to the Board are being finalized.
- Committees will meet a minimum of three (3) times a year.
- Meetings may be in person, conference call, via ZOOM or other such means.

### **ARCHITECTURAL COMMITTEE** (as stated in the Architectural Codes document)

The Architectural Committee shall manage building at Chateau Chaparral and is authorized to:

- Verify the location of Recreational Vehicles to determine if proper utilities are in place.
- Verify information on building permits, determine if proposed structures conform to building codes and issue building permits.
- Certify compliance and completion of the project.
- Refer to the Board of Managers for a ruling on requests for variances.
- Issue building Permits and CCOA Residency Permits which must be signed by two members of the Architectural Committee and a Board Member that is assigned as the liaison to the committee.

### **ELECTIONS COMMITTEE**

The Elections Committee shall oversee any matters to be put before the membership in a mail-out ballot and perform the functions outlined below:

- Recruit members to submit nominations for the Board of Managers
  - Submit nominees to the Treasurer to be vetted for good standing
  - Introduce nominees to the members at the Memorial Day General Membership Meeting
- Align mailing of ballots with time requirements as designated in the Bylaws
- Prepare the solicitation document that accompanies all ballots; submit it to the Board for approval
- Prepare the ballot document; submit to the Board for approval
- Coordinate printing of all needed copies, address labels, and envelopes with office staff
- Verify good standing status of members with the Treasurer prior to mailing
- Prepare and mail the ballot "packets"
- Count votes at the designated time keeping accurate tallies; calculate percentages; prepare a final report to be presented to the Board for certification. **(See Ballot/Voting Check List for details)**

## FINANCE COMMITTEE

The finance committee, in conjunction with the Treasurer, shall:

Research and prepare a proposed zero based budget looking at historical community needs and consideration for future requirements. (The final budget must be approved by the Board prior to presenting it to the membership at the Labor Day General Membership Meeting.)

Review quarterly financial reports, reevaluate line items and present suggested adjustments, if any, to the Board.

To aid in budget calculations, the following documents may be

- requested from CCOA's accounting firm through the Treasurer
  - Year to date Expense Detail
  - 3 year Profit & Loss comparison
- Found on line at <http://www.chateauchaparral.com/Reports.html>
  - Previous years' budgets
  - Current and past balance sheets; profit & loss statements
- Needed to determine possible carry-over
  - Current account balances (from Treasurer)
  - Cash flow chart
  - Determine projected income & expenses to the end of the year

## CAPITAL EXPENDITURES/BUILDING & GROUNDS

The Capital Expenditures/Building & Grounds Committee shall determine and submit recommendations for maintenance and/or improvements of the Common Areas and Buildings to the Board concerning:

- Landscaping
- Road Maintenance
- Drainage
- Lodge, Bathhouses, and Maintenance Shop

The committee, at the Board's direction, may also be asked to procure bids and develop a Reserve Study.

## BYLAWS

The Bylaws Committee shall:

- Review petitions which have been submitted proposing changes to the Bylaws, Architectural Codes and CCOA Rules and Regulations documents. The review must be done in a timely fashion to allow time for vetting of signatures prior to the Memorial Day Meeting.
- The review shall:
  - Check that the petition has been properly filled out and turned in prior to the deadline
  - Petitions cannot be altered once they have been submitted
  - Check that there is only one signature per lot
  - Assure alignment with the existing Condominium Declaration, Water Decree, and Bylaws (ie. a change in one section may require a change in another section)
  - Cross check petitions for similar changes that may conflict if both were voted on (ie. One might change the shed height to 13' and another to 14' ...can't do both.)
    - Possible solutions:
      - Submit to Elections Committee as a "vote for one", however one or the other would have to receive a 67% majority in the affirmative of the votes cast (ie. 100 votes cast; one would have to receive at least 67 votes or neither passes.)
      - See if one or the other is willing to withdraw their petition
  - Submit petitions to the Treasurer to vet signatures for good standing and ownership (the name must be on the deed; ie. wife cannot sign for husband or visa-versa if their name is not on the deed). The committee may want to request a copy for their record. The Treasurer will then pass them on to the Elections Committee to place on the ballot.
  - Present the proposed amendments to the Membership for discussion at the Memorial Day General Membership Meeting.

## E-VOTE WORDING

Please respond with a vote for the action, against the action or as abstaining by \_\_\_(date)\_\_\_\_. Failure to respond by the specific date has the same effect as abstaining in writing (e-mail) or failing to demand that action not be taken outside of a meeting by that date. Affirmative votes in writing must equal or exceed the minimum number of votes that would be necessary to take such action at a meeting.

ACTION:

Footnote:

While voting by e-mail is not the recommended form of voting, it may be used when a quick vote is needed and provides written documentation. So, do not delete the original email or the responses as they are subject to inspection by members if asked.

[ Taken from CCOA Procedures for Records Management Policy (In addition to any records specifically defined in the Association's Governing Documents, the Association must maintain the following, all of which shall be deemed to be the sole records of the Association for the purposes of document retention and production to owners: ...iv. Written communications among and the votes cast by the Board of Managers members that are: a. Directly related to an action taken by the Board without a meeting, or: b. Directly related to an action taken by the Board without a meeting pursuant to the Association's Bylaws.)]

After the vote is complete, if it is on a contract or legal document you will still need **two** to officers to sign the document. (Article XI)

**Be sure to ratify EACH vote at whenever the next official Board meeting might be.**



# Chateau Chaparral Owners Association

10795 CR 197-A  
Nathrop, CO 81236  
(719) 395-8282



## Board Members

President – Laurie Bechert #78  
Vice President – Debbie Railey #141/142  
Secretary - Jerri Munson #214  
Treasurer w/o Portfolio – Joanie McCord #143

## Board Members

At Large – Jim McGannon #38/39  
At Large – Gene Theilig #120/220  
At Large – Jody Juneau #96, 119, 228  
229

**Be sure the correct letterhead is used.**

Our Maxim: Each owner should endeavor to promote the common good and strive to assist CCOA towards improvement.

## **Board of Managers Meeting**

(Date) (Time) (Location)

## **Roll Call:**

## **Approval of Minutes from (date) Board Meeting**

## **Treasurer's report:**

## **Old Business:**

## **New Business:**

## **Other:**

## **Next Meeting:**

**Executive Session:** Legal, Compliance Issues, Liens

**Return to general session for executive vote**

## **Adjournment:**



# Chateau Chaparral Owners Association

10795 CR 197-A  
Nathrop, CO 81236  
(719) 395-8282



## Board Members

President: Laurie Bechert Lot 78  
Vice President: Debbie Railey Lots 27, 141, 142  
Secretary: Mike Koenig Lot 128  
Treasurer w/o Portfolio: Joanie McCord, Lot 143

## Board Members

At Large: Jim McGannon, Lots 38 & 39  
At Large: Chris Adkins, Lot 31  
At Large: Gene Theilig, Lots 120 & 220

**Be sure the correct Board letterhead is used.**

Our Maxim: Each owner should endeavor to promote the common good and strive to assist CCOA towards improvement.

## **General Membership Meeting**

Date Time Location

**Call to Order**

**Appoint Sergeant at Arms**

**Pledge of Allegiance**

**Moment of Remembrance**

**Roll Call**

**Verify Quorum**

**New Member Recognition**

**Approval of August (Date) General Membership Meeting Minutes**

**President's Message**

**Treasurer's Report**

**Old Business:**

**New Business:**

**Committee Reports**

Finance

Architectural

Nominations

Capital Expenditures

Building & Grounds

Bylaws

Social

**Questions, Comments, Concerns**

**Adjournment**



# Chateau Chaparral Owners Association

10795 CR 197-A  
Nathrop, CO 81236  
(719) 395-8282



## RESOLUTION OF THE CHATEAU CHAPARRAL ASSOCIATION REGARDING POLICY AND PROCEDURES FOR CONDUCT OF MEETINGS

AS ADOPTED JUNE 25, 2017, Revised November 12, 2021

### A. PLACE OF MEETINGS

Meetings of the Association shall be held at such place as the Board of Managers may determine.

### B. NOTICE OF MEETINGS

- 1.) Notice of General Membership Meetings shall be mailed or hand delivered at least 10 days but not more than 50 days prior to the date of the meeting.
- 2.) Electronic notice of a Board of Managers' meeting shall be given as soon as possible but at least twenty-four hours before the meeting.

### C. ALL ASSOCIATION AND BOARD MEETINGS ARE TO BE CONDUCTED BY ROBERTS RULES OF ORDER.

### D. OPEN MEETINGS

All regular and special meetings of the Association, the Board of Managers or any Committee thereof, shall be open to attendance by all members of the Association or their representatives. Agendas for all meetings shall be made reasonably available for examination by all members of the Association or their representatives.

### E. MEMBERS RIGHT TO SPEAK

At an appropriate time determined by the Board, but before a vote is taken on an issue under discussion, owners or their designated representatives shall be permitted to speak regarding that issue. The Board may place reasonable time restrictions, not to exceed three (3) minutes, on persons speaking during the meeting. If more than one person desires to address an issue and there are opposing views, the Board shall provide for a reasonable number of persons to speak on each side of the issue.

### F. APPROPRIATE BEHAVIOR AT A MEETING:

- 1.) Members must be recognized by the President or chairperson conducting discussion before speaking.
- 2.) Only one member in good standing will be allowed to speak at a time. Such member will identify him/her self by name and lot number.
- 3.) Beligerant or disrespectful comments will not be allowed and the offender will be subject to ejection from the meeting.

## G. EXECUTIVE CLOSED DOOR SESSIONS

Members of the Board or any committee may hold an executive or closed door session only with respect to discussion of the following matters:

- 1.) Matters pertaining to employees of the association or involving the promotion, discipline or dismissal of an officer, agent, or employee of the association;
- 2.) Consultation with legal counsel concerning disputes that are the subject of pending or imminent court proceedings or matters that are privileged or confidential between attorney and client;
- 3.) Investigative proceedings concerning possible or actual criminal conduct;
- 4.) Matters subject to specific legal requirements protecting matters from public disclosure;
- 5.) Any matter the disclosure of which would constitute an unwarranted invasion of individual privacy;
- 6.) Review of or discussion relating to any communication from legal counsel.

Prior to convening in executive session the chair shall announce the general matter of discussion as enumerated above. No rule or regulation of the Board or any decision shall be adopted during an executive session.

## H. BOARD MEMBERS' PARTICIPATION IN BOARD MEETINGS

Board members may participate in the meetings by any method of communication, provided that all participants in the meeting may hear each other throughout the meeting.

## I. PROXIES

Proxies must on file with the Secretary of the Association prior to any vote taken.

## J. VOTING AT MEETINGS

Votes may be cast in person or by proxy. Voting shall be based upon one vote per unit. A member must be in good standing as stated in the Association's Bylaws to be eligible to vote. Members in good standing or properly designated proxies will receive a voting card with their lot(s) number(s) when signing into the meeting to be used on issues brought before the membership.

A vote on any matter affecting the common interest of the Association on which all unit owners are entitled to vote shall be by secret ballot. A secret ballot may include, but is not limited to mail out ballots or ballots sent on a secure electronic voting site.

## J. BOARD DECISIONS OUTSIDE OF A MEETING

To ensure a timely response to issues arising prior to a scheduled Board meeting, the Board may take action through electronic communication (phone or internet). Any action taken in such manner shall be documented and available for inspection as outlined in the Bylaws of the Association.

## K. MINUTES

Minutes of all meetings will be posted on the CCOA website as soon as they are available.

**PRESIDENT'S OR VICE PRESIDENT'S CERTIFICATION:** The undersigned, being the President, or in his/her absence, the Vice President of the Chateau Chaparral Owners Association a Colorado nonprofit corporation, certifies that the foregoing Resolution was adopted by the Board of Managers of the Association, at a duly called and held meeting of the Board of Managers on June 25, 2017; revised November 12, 2021 and in witness thereof, the undersigned has subscribed his/her name.

CHATEAU CHAPARRAL OWNERS ASSOCIATION,  
A Colorado non-profit corporation

By: \_\_\_\_\_  
Its: President or Vice President



**CCOA SECRETARY DUTY GUIDELINES**  
(much of this can be coordinated with office staff)

Write, sign & submit meeting minutes

- Place signed document in the appropriate file (file cabinet 3; top drawer)
- Post to website in PDF format

Meeting preparation

- Prepare agenda with the president
- Print the current agenda & minutes of the last Board or General Meeting
- Notify members of Board meetings via e-mail blast with agenda attached
- Print & post notifications of meetings & agenda in the Lodge & on bulletin boards outside the Lodge and at the entrance to the park.
- PowerPoint presentations & post to website in PDF format following the meeting

Prepare & mail General Meeting notices

- General Meeting notices must be sent by regular mail no more than 50 and no less than 10 days prior to the meeting date. Coordinate with treasurer & office staff to be sure postage and needed materials are on hand ahead of time.
  - ~ There is a post card format on the office computer that can be edited for the May meeting. Double click on desktop folder labeled Print for Mailing, then open and edit May Meeting postcard.
  - ~ There is a label format that can be edited to place on the outside of the envelopes for the July and September meetings. Double click the desktop file labeled Office Forms > then double click on Mail Labels & Postcard formats > double click on 2019 Meeting Announcement Labels and edit

\* Coordinate these notices with the elections committee for the July meeting. Ballots must be mailed at least 30 days prior to the date they are due.

\* Coordinate notices with the finance committee and/or treasurer for the September meeting as the proposed budget must be sent out.

Prepare & file changes to governing documents (Red notebook)

- Be sure documents/policies are properly signed & dated
- Be sure office staff updates what is on the shelf
- Post documents to website
  - ~ Most document/policy buttons are already there, but need to be linked to the new document
- Mail copies of amended Bylaws to members within 30 days (check CCIOA & Bylaws)
- There are files for the Bylaws in file cabinet #3

Info for Documents that may need to be filed with Chaffee County:

~ Cost of filing (check or cash): First page is \$11 and \$5 each additional page; this of course is subject to change

~ Format for recording: Title required on first page only; top margin minimum of 1.5 inches

File annual report with USDA-RD [lori.schroyer@usda.gov](mailto:lori.schroyer@usda.gov) (coordinate with treasurer)

File annual report with DORA and CO Secretary of State (Altitude Law does under current retainer)

Miscellaneous items that may arise from time to time

- Manage required confidentiality agreements
- Track liability waivers for contractors connected to common property jobs (file cabinet #3, 2<sup>nd</sup> drawer)
- Monitor Insurance Policies (most auto renew around March 4<sup>th</sup>)

## ATTORNEY & LEGAL INFORMATION

CCOA is represented by:

David Firmin

[www.altitude.law](http://www.altitude.law)

[dfirmin@altitude.law](mailto:dfirmin@altitude.law)

Direct 303.991.2028 :: Main 970.259.4107 :: Fax 303.991.2047

Communications: (The CCOA Manager may assist with written communications)

- **ALL** communications between attorney and client are privileged/confidential
  - If a Board member thinks certain information should be shared with the Membership, it must be put to a vote of the Board.
- **Appoint two (2) Board members as the points of contact**
- E-mail Communications
  - Cc all Board members and the Association email
- Phone Communications
  - Should be initiated by a point of contact and at least two (2) Board members should be in on the call
  - May ask Firmin's office to set up a conference call if more Board members wish to participate
  - May be recorded with participants' permission and transferred to an audio file to store on a CCOA device.
    - Recorder is available in the office
- All written communications should be copied & filed in the office.
- NO privileged documents are to be stored on any personal devices.

General Terms of Service:

CCOA has the \$250 retainer plan. Please see the Plan for specific details.

- Reduced hourly rates
- Free phone consultation (see Phone Calls for specific limitations)
- 30 minutes of email consultation/month with designated Board member or Association manager
- Free in office consultation (30 minutes or less)
- Attendance at a regular Board Meeting per 12 month period for up to an hour
- One free SB100 Policy Update (9 policies require under CCIOA)
- Prepare Periodic Report & file with CO Secretary of State (fees apply)
- Prepare and file DORA report (fees apply)

## LEGISLATIVE UPDATE

Altitude Law has been asked to update these policies as well as the Conduct of Meetings Policy to be in accordance with the new legislation. The firm will also provide templates for notification letters.

Policies affected by **HB22-1137**:

PROCEDURES FOR COLLECTION OF UNPAID ASSESSMENTS AND FINES AS ASSESSED ACCORDING TO THE SCHEDULE OF FINES ADOPTED BY THE ASSOCIATION

POLICY AND PROCEDURES FOR ENFORCEMENT OF GOVERNING DOCUMENTS

**Brief** summary of CCOA changes required by **HB22-1137** effective August 9, 2022:

- Additional method of late notifications
- Notification in preferred language as requested by owner (consultation with a professional translator might be required)
- Owner may request notification of Designated Contact in addition to notification of the unit owner
- Records of contact must now also include date, **time** & method of contact
- Requires a hearing be held before referring matter for collection; allows affected owner to receive the results of any such vote
- Interest on any unpaid association assessments, fees, or fines cannot be greater than 8% per year
- Violations
  - Written notice of violations shall be delivered by certified mail, return receipt requested (\$7.38)
  - Adjust time frames for followup
  - Send written notice of cure
  - The Association may not pursue foreclosure based on fines owed
- Schedule of Fines and Fees must be updated
  - Cannot assess fines on a daily basis
  - Fines cannot exceed \$500.00 in total for any one violation

Document affected by **SB22-059**:

- Bylaws Article II, Section 4 (Owner Proxy)

The nine mandatory policies required by the Colorado Common Interest Ownership Act (CCIOA) include:

- (1) the adoption and amendment of policies, procedures and rules;
- (2) collection of unpaid assessments;
- (3) handling board member conflicts of interest;
- (4) conduct of meetings;
- (5) enforcement of covenants and rules, including notice and hearing procedures;
- (6) owners' right to inspect and copy records;
- (7) investment of reserves;
- (8) dispute resolution; and
- (9) a reserve study policy.

## SHHHHHH. . . DON'T TELL ANYONE—DO YOUR DIRECTOR COMMUNICATIONS VIOLATE THE LAW?

FILED UNDER

[Rules, Manager Resources](#)

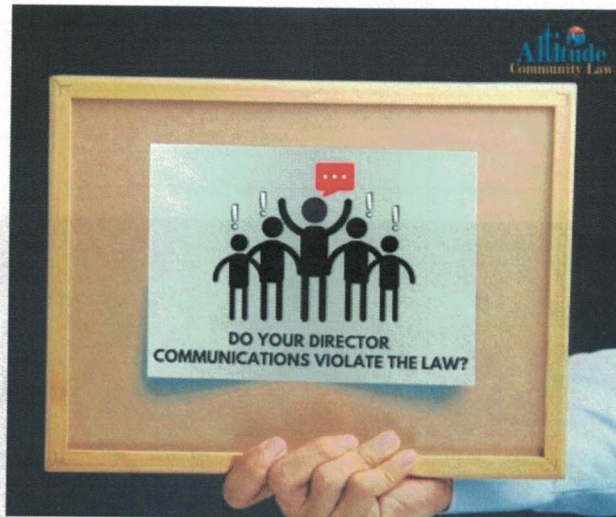
POSTED

March 1, 2022

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Let's face it, being a board member is no easy task, especially if there is discord among directors on the board. When there is distrust among directors, communication becomes funnelled, selective, and exclusionary. But is this type of communication really in the best interests of the community? And even more so, is it legal? Oftentimes, it is not.

The Colorado Common Interest Ownership Act ("CCIOA") was amended in 2009 to address communication between directors and essentially prohibits secret communications between directors, as well as hoarding information. Specifically, Section 303(1)(b) of CCIOA provides as follows:

- Notwithstanding any provision of the declaration or bylaws to the contrary, all members of the executive board shall have available to them all information related to the responsibilities and operation of the association obtained any other member of the executive board. This information shall include, but is not necessarily limited to, reports of detailed monthly expenditures, contracts to which the association is a party, and copies of communications, reports, and opinions to and from any member of the executive board or managing agent, attorney, or accountant . . . [emphasis added].

When violations of the above statutory provision occur, oftentimes, board members don't even realize they are doing anything wrong. In other situations, directors are blatantly violating the law. Below are several examples of communications (or lack thereof) that violate Section 303(1)(b) of CCIOA.

1. Board member A is disliked by the remaining directors who believe it would be in the best interests of the community if board member A is removed from the board. As a result, this group of directors reaches out to the association's attorney, at the exclusion of board member A, to seek advice on how board member A may be removed. This conversation with the attorney is never communicated to board member A.
2. Board member A and board member B do not get along. Most board meetings are continually disrupted by bickering between these directors. The three remaining directors do not know what to do, so they reach out to the community manager and the association's attorney for advice. Although the advice is used, these communications are not disclosed to board members A or B.
3. Board appoints director A to oversee the community painting project. During the project, painting contractor advises director A there may be structural problems with one of the buildings and recommends a structural engineer be retained. Director A contacts the community manager and instructs her to obtain bids. Neither the conversation with the contractor, nor the request for bids was communicated to the remaining directors.

4. Board member A believes the board is not properly exercising its maintenance obligations, so she contacts the association's attorney. Attorney advises that everything is being performed correctly. Board member A does not communicate this information to the rest of the directors believing no harm, no foul.
5. Board member A and board member B believe that board member C is disclosing board information to owners in the community, and they don't trust him. As a result, board members A and B discuss association business outside of meetings between themselves and leave board member C out to ensure confidential information does not get leaked.

In some of the above examples, directors believed they were acting in the best interests of their communities by excluding certain directors from communications; but in reality, these directors were exposing themselves and their associations to liability by violating the requirements of the law.

This is not to say that board members can never communicate unless everyone is on the email or on the call, but it is saying that whatever information is obtained by a board member, or group of board members, concerning the association, must be shared with all other directors on the board.

For more information concerning communications between board members, please contact an Altitude attorney at 303.432.9999 or at [hoalaw@altitude.law](mailto:hoalaw@altitude.law)

POSTED

Tuesday, March 1st, 2022

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## 2020-2021 LEGAL SERVICES AND FEE SUMMARY AGREEMENT

The following is a summary of the fees and charges for the various legal services offered by Altitude Community Law.

Our retainer programs reduce your association's legal expenditures and simplify the budgeting process by establishing a **fixed monthly fee**. This fee purchases the essential legal services your association requires, making us available to you as needed. We now offer three retainer packages to better fit your needs.

### RETAINER SERVICES AND BENEFITS

For a yearly fee of \$2,400, payable monthly at **\$200 per month**, retainer clients receive the following legal services and benefits without further charges:

**Phone Calls.** We will engage in unlimited telephone consultations with a designated board member or association manager regarding legal and other questions and status of ongoing work we are performing for you, exclusive of litigation, foreclosure, covenant enforcement, and document amendments. Written consultations/communications such as emails, written correspondence, and calls with multiple Board members at the same time will be billed at our reduced hourly rates, as will our time to review governing documents, correspondence, etc., if necessary to answer a question.

**Reduced Hourly Rates.** For legal services billed hourly beyond what is included in the retainer, we will provide those services at \$20 per hour less than our non-retainer rates for attorneys and \$10 per hour less than our non-retainer rates for paralegals.

**In-Office Consultation.** We will meet with a designated board member and/or the association's manager in our office for 30 minutes on any new matter. If the meeting extends beyond the 30 minutes, you will be billed at our reduced hourly rates.

**Attendance at Board Meeting.** At your request, we will attend one board meeting per twelve month period for up to one hour. As a retainer client, we will prioritize attending the board meeting of your choosing. If our attendance exceeds one hour, you will be billed at our reduced hourly rates.

**Audit Response Letter.** We will prepare a letter to your financial auditor in connection with your annual audit indicating pending or threatened litigation. We will also review your annual financial audit upon completion.

**Periodic Report.** We will prepare and file your periodic report with the Secretary of State if you have designated us as your registered agent.

**DORA Renewal:** We will prepare and file your renewal report with DORA if requested.

### RETAINER PLUS SERVICES AND BENEFITS

For a yearly fee of \$3,000, payable monthly at **\$250 per month**, we will provide the following legal services and benefits without further charges:

In addition to the services provided to Retainer clients, **Retainer Plus** clients will receive the following additional services:

**Email Consultations.** We will engage in 30 (thirty) minutes of email consultations with a designated board member and the association's manager regarding legal and other questions and the status of ongoing work that we are performing on your behalf, exclusive of litigation, foreclosure, covenant enforcement, and document amendment matters. Additional written consultations and communications will be billed at our reduced hourly rates. If it is necessary to review governing documents, correspondence, etc. to answer a question, you will be billed at our reduced hourly rates.

**SB100 Policy Update.** We will provide one free SB100 Policy update for your association.

**Credit Card Payments.** For Retainer Plus clients, we will accept homeowner payments via credit card.

#### PREMIUM RETAINER SERVICES AND BENEFITS

For a yearly fee of \$6,000, payable monthly at \$500 per month, we will provide the following legal services and benefits without further charges:

In addition to the services provided to Retainer and Retainer Plus clients, Premium Retainer clients will receive the following additional services:

**Email Exchanges.** We will communicate with your delegated board member and the association's manager via email up to 60 (sixty) additional minutes every month which includes minor research.

**Attendance at one additional Board Meeting per year.** At your request, we will attend a total of two board meetings per twelve month period for up to one hour each. If our attendance exceeds one hour, you will be billed at our reduced hourly rates.

Other needed revisions to SB100 Policies required by new legislation reduced by \$100.

#### RETAINER SERVICES GENERALLY

We will send notices of renewal of retainers annually. Upon expiration, the retainer will automatically be renewed on a monthly basis until we receive a notice to terminate.

#### FIXED FEE SERVICES

Altitude Community Law offers fixed fee services. The association will pay Altitude Community Law (the Firm) for performance of the services as outlined in a proposal for services, plus costs. The association understands that it is not entering into an hourly fee agreement for that specified service, except as otherwise set forth. This means the Firm will devote such time to the matter as is necessary, but the Firm's fee will not be increased or decreased based upon the number of hours spent.

#### NON-RETAINER SERVICES AND BILLING TERMS

If you desire representation on a non-retainer basis, you will be billed hourly for all work performed unless a fixed fee (such as collection matters or amendment of documents) has been agreed to in advance. Our hourly rates for 2020 non-retainer clients are \$95 - \$120 for paralegals/legal assistants, \$300 - \$330 for attorneys. Non-retainer clients are billed hourly for all phone calls.

#### TERMINATION OF REPRESENTATION

You may terminate our representation at any time by notifying us in writing and we may resign from representation by notifying you in writing. In either case, you understand that court or administrative rules may require us to obtain a judicial or administrative order to permit our withdrawal. We agree that upon receipt of your termination notice, we will take such action as is necessary to withdraw from representing



you, including requesting any necessary judicial or administrative order for withdrawal. However, whether you terminate our representation, we cease performing further work and/or withdraw from representing you, as allowed under the Colorado Rules of Professional Conduct or for your failure to comply with the terms of this Agreement, you understand and agree that you continue to be responsible to us for the payment of all fees and expenses due and owing and incurred in withdrawing from representing you, including any fees and expenses we incur to obtain, and/or during the time we are seeking to obtain, any necessary judicial or administrative order to approve our withdrawal.

If you so request, we will send to you your files as soon as a particular matter is concluded. If you do not request your files, the firm will keep the files for a minimum of ten (10) years, after which it may retain, destroy or otherwise dispose of them.

#### PRIVACY POLICY

Attorneys, like other professionals who provide certain financial services, are now required by federal and state laws to inform their clients of their policies regarding privacy of client information. Attorneys have been and continue to be bound by professional standards of confidentiality that are even more stringent than those required by this new law. Thus we have always protected the privacy of your confidential information.

In the course of providing legal services, we sometimes receive significant nonpublic personal information from our clients. As a client of Altitude Community Law you should know that all such information we receive from you is held in confidence. We do not disclose such information to anyone outside the firm except when required or authorized by applicable law or the applicable rules of professional conduct governing lawyers, or when authorized by you in writing.

We retain records relating to professional services that we provide so that we are better able to assist you with your professional needs and, in some cases, to comply with professional guidelines. In order to guard your nonpublic personal information we maintain, physical, electronic and procedural safeguards that comply with our professional standards.

If you have any questions or would like more information about our privacy policies and practices, please let us know.

#### GENERAL TERMS FOR ALL CLIENTS

We represent the association as a corporate entity. We will take our direction for work as instructed by the manager or the board. We do not represent any individual board members or homeowners.

Clients are required to reimburse us for cost advances and other out-of-pocket expenses. Reimbursement is made at actual cost for outside charges such as court recording fees, filing fees, service of process charges, computerized legal research, expert witness fees, title searches, deposition reporting and transcription fees, outside photocopying, etc. Typically, we do not charge for internal photocopies, faxes, postage and long distance telephone calls unless these charges are extraordinary. We provide monthly statements for services and expenses incurred. Unless other arrangements are made and agreed upon in writing, all charges are due and payable upon your receipt of the statement. A finance charge of 12% per annum may be imposed upon any amount not paid within 30 days of becoming due. Fees may be modified upon 30 days prior written notice. If it becomes necessary to file suit to recover unpaid attorney fees, the prevailing party shall be entitled to receive its attorney fees.

In the event we have not been provided with, or our files do not contain, all of the recorded documents of the association, we retain the right to obtain any such recorded documents to supplement our file without association approval and at the association's cost. The association's cost will include, but not be limited to, hourly charges for procuring the documents and copying costs. In order to provide you with the most efficient and effective service we will, at all times, unless otherwise directed, work through your manager if appropriate.

Should you have any questions, please do not hesitate to call any of our attorneys. We are happy to answer any of your questions or meet with you at no charge to discuss our services and fees in greater detail.

**RESPONSE REQUIRED**

If you desire to engage our services, please indicate below which type of service you prefer by checking the appropriate box, execute the acceptance and return it to us via mail, e-mail or fax.

**Legal Services:** (select one)

- Retainer Services
- Retainer Plus Services**
- Premium Retainer Services
- Custom Retainer Option
- Non-Retainer

**Collection Services:**

Please see attached Fee Structure

**Billing Preference:** (select one)

- Paper and Mailed
- Electronic and Emailed**

Email address: ccoatreasurer@gmail.com  
(please note, only one email address per management company or self-managed association will be used)

Agreed to and accepted this 1<sup>st</sup> day of December 2020

Chateau Chaparral Owners Association  
Print Association Name

By: Laurie A. Bechert Laurie A. Bechert  
President/Manager

By: \_\_\_\_\_  
CCO Officer



EXHIBIT A TO FEE SUMMARY AGREEMENT FOR  
2020-2021 LEGAL COLLECTION SERVICES

Fee Structure

This is a flat fee agreement for collection services. The Association will pay Altitude Community Law (the Firm) for performance of the services described below, plus costs. The Association understands that it is not entering into an hourly fee agreement for collection services, except as otherwise set forth below. This means the Firm will devote such time to the representation as is necessary, but the Firm's fee will not be increased or decreased based upon the number of hours spent.

The Association has the right to terminate the representation at any time and for any reason, and the Firm may terminate the representation in accordance with Rule 1.16 of the Colorado Rules of Professional Conduct. In the event that the Association terminates the representation without wrongful conduct by the Firm that would cause the Firm to forfeit any fee, or the Firm justifiably withdraws in accordance with Rule 1.16 from representing the Association, the Association shall pay, and the Firm shall be entitled to, the fee or part of the fee earned by the Firm as described in paragraph 1 above, up to the time of termination. If the representation is terminated between the completion of increments (if any), the Association shall pay a fee based on our standard hourly rate set forth in our standard fee agreement. However, such fees shall not exceed the amount that would have been earned had the representation continued until the completion of the increment, and in any event all fees shall be reasonable. Once the work is performed, the Fee will be deemed earned and is due upon receipt of an invoice.

**Case Intake, Review and Assessment - No charge**

We do not charge you to review new collection cases and make recommendations. However, if we receive open collection files from another attorney, there will be a \$25 set-up and review fee per file. This fee will be waived if you are a retainer client.

At the rates set here in, upon receiving a new turnover, we will perform the following work for due diligence and to put the Association in the best possible collection position: Assessment Lien Package (if a lien has not already been recorded), Demand Letter, Public Trustee Search, and Bankruptcy Search. Next steps after this work depends on the homeowner's response, balance due, history, information acquired, and other factors.

**Demand Letter - \$155**

Preparation of a demand letter includes reviewing the ledger or equivalent record to ascertain the amounts owed including interest, late charges, fines and charge backs, if relevant, and review prior notice given to owner to meet statutory requirements; drafting and mailing the demand letter to the homeowner; follow-up, including telephone calls with the management company and homeowner, negotiation of an acceptable payment plan; follow-up letter (as needed) to confirm payment arrangements. All correspondence other than the initial demand and payment plan letter is \$50 per letter (e.g., follow up demand letter, breach of payment plan letter).

**Super Lien Demand Letter - \$110**

Preparation of a demand letter post foreclosure includes reviewing ledger to ascertain amounts owed; verifying party to whom demand should be sent; drafting and mailing demand letter; or if request is received from a lender for the super lien amount, drafting a response. All discussions with the owner or lender after the letter are billed hourly.

**Assessment Lien Package - \$110**

This charge includes preparing both the lien and the lien release. It also includes verification of ownership with either the assessor's office or title company.

**Lawsuit - \$455 plus costs**

This charge includes preparing the summons and complaint, filing these papers with the court, appearing at the return date and obtaining default judgment. It also includes all negotiations and telephone conferences with the owners prior to an answer being filed with the court.

**Lawsuit: Trial - Hourly rates apply**

All preparation for trial and appearances in court are billed on an hourly basis. If the association prevails at trial, it can recover its attorney fees and costs from the delinquent owner.

**Interrogatories - \$130**

We prepare and file a motion with the court to request the court to order an owner to answer a series of questions from us about the owner's assets. We will use the answer to help satisfy any judgment obtained by the association. We will also arrange for service of the order on the client and monitor and evaluate answers received from the owner.

**Contempt Citation - \$155**

If an owner fails to answer the interrogatories as ordered by the court, we will prepare and file all the necessary paperwork to require the owner to appear before the judge to explain why the questions were not answered. Our fee also includes our appearance at court, subsequent appearance if the owner fails to appear initially and review and evaluation of the answers once received from the owner.

**Garnishments - \$155 (each)**

We will identify entities (usually banks, employers or tenants) which owe or have money of the owner and prepare documentation to be filed with the court to order the entity to release all or a portion of the money they hold for or are obligated to pay the owner to the association. We will arrange for service of the necessary documentation and will monitor for responses.

**Payment Plans - \$125- \$225 (each)**

In the event an owner wishes to pay their balance due over time exceeding 6 months, we will charge a fee depending upon the length of the payment plan to prepare the necessary documentation, monitor and process payments and close the file. Unless we are instructed otherwise, we may agree to payment plans of up to 24 months with any homeowner.

**Motions - \$150- \$200**

Occasionally, certain motions may be necessary in a case in order to get the court to issue a ruling without further legal action. These will be prepared, filed, monitored and argued before the court, if necessary.

**Outbound Phone Calls - \$55**

Once we obtain a phone number for an owner, we will make up to 3 outbound calls to an owner to secure payment. All other calls with an owner will be at no charge.

**Payoff Calculations - \$130**

It is important for your management company or treasurer to confirm all payoff amounts with us prior to issuing status letters or advising owners of balances so that all legal costs and fees can be included. We will also insure that all fees necessary to close or dismiss a file are included. Rush charges do apply.

**Monitoring Lender Foreclosure - \$220 (one-time charge)**

It is important to monitor lender foreclosure through the sale and redemption period. We obtain periodic ownership and encumbrance reports, if needed, and routinely verify the status of the foreclosure action. We advise you of the association's rights and options throughout the process. Once a sale is completed, we advise the association of the new owner and the association's rights.

**Monitoring Bankruptcy - \$230 Chapter 7; \$360 Chapter 13 (one-time charge)**

We prepare and file a Proof of Claim, if necessary, monitoring the bankruptcy through discharge. Our services include reviewing the plan (if Chapter 13) to make sure it includes provisions for payment of pre- and post-petition assessments, and checking with the trustee and debtor's attorney to determine if property has been abandoned. If it becomes necessary to file any motion with the court, we charge fixed fees as follows:

Motion to Dismiss: \$595

Motion for Relief from Stay: \$795

Objection to Plan: \$395

All preparation for and appearances in court are charged on an hourly basis.

**Assessment Increase Notice - \$395**

We prepare notice to the bankruptcy court of any increase in the ongoing debt owed to the association upon receipt of notice from you, including filing a proof of claim and letter to the bankruptcy attorney or debtor.

**Public Trustee/Bankruptcy Search - \$30 (each)**

Verifying whether a property is in foreclosure or subject to a bankruptcy before filing a lawsuit can save the association hundreds of dollars. So, we will search both the public trustee and bankruptcy records and then advise the association if different action is necessary.

**Receiverships (County Court) - \$450 initial, then hourly. Costs are approximately \$250**

We will prepare pleadings and appear in court to obtain appointment of a receiver to collect rents where the property is abandoned or being rented by the owner. Once appointed, we supervise disbursement of the monies collected by the receiver at an hourly rate.

**Lien/Judicial Foreclosures (District Court) - Hourly rates apply**

We recommend that foreclosure be considered as a viable collection remedy in all problem cases. Our fee is based on the complexity of your circumstances and should reflect the value you will receive from the monetary result of the foreclosure.

**Lien Sales - \$500**

We list all liens that are potentially available for sale on our website at <https://AltitudeLaw/general-topics/liens-for-sale/> at no cost. In the event a lien is sold we collect our fee from the purchaser of the lien. In order to handle quickly, within the legal time limits, we reserve the right to sell liens, without prior approval if the purchase price is equal to or more than the balance due.

**Status Report - \$75/month (if not accessed electronically)**

We provide online access to each association's collection status report. For more information please contact us. If your association chooses to have us prepare your status report, there will be a monthly fee.

**Asset/Person Locations - \$25-\$100**

From time to time we must locate debtors and/or their assets in order to secure payment for you. We will use various databases for which there is a cost to us, to secure possible leads. This information is then reviewed and analyzed to develop the best strategy for quickly and efficiently securing payments.

Jerri Munson  
117 S. Reed St.  
Lakewood, CO 80226

(719) 201-2266  
craatlarge3@gmail.com