

Heritage Pointe Master Association, Inc.  
Financial Committee

Adopted May 18, 2023

## **Procedure for owners to request financial reports**

### Purpose:

To provide a clear, open process for Heritage Pointe Association unit owners to request financial information

### Procedure:

1. Financial information will continue to be posted on the Heritage Pointe website monthly
2. An owner may request additional financial information on a bi-monthly basis up to 6 times per year
3. Requests must be in writing and sent to the Heritage Pointe Treasurer (pauldifuccia@heritagepointefl.com) and Sentry Management (Valerie Hoover vhoover@sentrymgt.com)
4. Information will be provided to the owner within 30 days of receiving the written request.
5. Information is limited to financial reports only. No copies of invoices, etc. will be made available.

*NB: This procedure complies with Florida State Law 718.71, and the Heritage Pointe By Laws and has been reviewed by Heritage Pointe Master Association legal team for compliance.*