

Hello Scott:

Date: October 6, 2024

Re: Questions from Scott Steinmentz 311 Stonegate Circle, Plymouth Place HOA, Billings MT

From : Inger Tognetti, HOA President

Here is the information as complete and to the best of my ability to answer your questions:

Inger, reaching out to you with several questions on the homes association.

1.) Can you confirm the monthly HOA fees is \$225? Also can you confirm what is covered?

I've made a copy of the page in the Bylaws pg. 11 under ASSESSMENTS FOR COMMON EXPENSES that direct the Board of Directors to set the monthly assessments. Included is a copy of the Annual Meeting Minutes for June 2, 2018 with the information when the \$225.00 per month was to begin (August 2018).

On the back of the copy of Bylaws pg. 11 is pg. 12 under MAINTENANCE OF UNITS AND COMMON ELEMENTS: (a) Association Responsibilities:

Also, I've included a copy of pg. 7 of the Declaration of Unit Ownership which lists on (d) the insurance that the HOA provides. Insurance is further explained in the Bylaws on pages 8, 9, and 10. Hope pg. 7 confirms what the HOA covers.

2.) Can you share recent financial statements?

I've emailed copies of the Profit and Loss and Balance Sheets from June 2024 through August 2024. The September financials will be coming shortly. I always send them out with the next month's board meeting because the BOD goes over them. The next board meeting, date to be determined, is in October.

3.) Can you share minutes from recent meeting?

I've emailed copies of the Regular Board Meeting Minutes from June 2024 through September 2024 including the Annual Meeting Minutes from June 1, 2024.

4.) Can you confirm if there is any pending litigation against the homes association?

I am not aware of any pending litigation against Plymouth Place HOA. I can say with absolute certainty that myself and/or the BOD would have been notified if there was litigation. In my time here from 2007 through 2024, there has never been litigation against Plymouth Place HOA.

5.) Lastly, can you confirm how many units are in the homes association?

I've included a hard copy of the FIRST AMENDMENT TO the DECLARATION OF UNIT OWNERSHIP FOR PLYMOUTH PLACE TOWNHOMES and underlined "36 units".

I sincerely hope the emails, hard copies, and answers to your questions satisfies the answers you are seeking.

Inger Tognette, 2024 President of Plymouth Place HOA



10. ASSESSMENTS FOR COMMON EXPENSES.

(a) When Assessments Begin. The owner of each completed unit shall be obligated to pay monthly and special assessments for common expenses beginning on the 1st day of the month following completion.

(b) Amount. Prior to the annual meeting, the Board of Directors shall prepare an Association budget for the coming year. A copy of that budget, together with a statement of the amount of each monthly assessment for the coming year, shall be delivered to each unit owner at least one week before the annual meeting. Each monthly assessment for a unit shall be equal to the total estimated common expenses for the coming year, plus a reasonable reserve allowance for replacement of improvements, divided by twelve, divided by the total number of completed units/multiplied by the percentage of undivided interest in the common elements for the assessed unit. Assessments shall be due and payable on the first day of each month. If an annual budget is not prepared as required, the monthly assessment due shall be equal to the amount of the monthly assessment for the previous year until changed by the Board of Directors. The regular monthly assessments may be changed by the Board at any time it determines that the change is necessary or advisable. Written notice of the amount of any changed monthly assessment shall be given, by mail or otherwise, to each unit owner at least thirty (30) days in advance of the first payment due date for the assessment. Except for changes in the amount of the monthly assessments, no bills or other notices that monthly assessments are due need be given by the Association. Assessments must be based upon and computed by using the percentile interest that each unit owner has in the common elements.

(c) Record Keeping. All assessments collected by the Association may be commingled in a single fund from which shall be paid the expenses for which the assessments are made. Separate records of payments received shall be kept for each unit.

(d) Interest and Late Fees. Assessments paid more than 10 days after the date when due shall bear interest at the rate of ten percent (10.0%) per annum from the date when due until paid; in addition, late paying owners shall be obligated to pay a late fee if a schedule of late payment fees has been adopted by the Board of Directors. All payments upon assessments shall be applied first to late fees, then to interest, and then to the earliest assessment due.

incur a late payment fee as determined by the BOD in accordance with a late payment fee schedule

(e) Special Assessments. Special assessments may be made by the Board of Directors for capital improvements only upon an affirmative vote of all of the

Annual Plymouth Place HOA Meeting
June 2, 2018 – 1000 am
Residence Inn by Marriott –
956 S 25th Street
Billings, MT 59102

6/2/18

Meeting called to order by Greg Szudera, HOA President/Board Member at 1000.

Quorum of members in attendance was established by Greg Szudera, Board Member. Members not in attendance were: Inger Tognetti, Lila Buen, Rosalind Bulger, Anna Mae Wright Larry McClellan, Todd Appel, Susan London, Debra Vanderhoof, Lil Anderson, Bill Adolph. Frank Borman, Tom Strouf.

Greg confirmed a quorum to the members present so the Annual meeting could continue.

Greg thanked Linda Lentz for bringing cookies and told the members he would give the members a couple of minutes to help their self to coffee and cookies prior to the reading of the minutes from last year.

Greg asked Tina to read the Annual HOA Meeting minutes from June 3, 2017. Greg asked the members for any corrections or additions to the minutes read and if there were none, asked for a motion for approval. No discussion or changes were submitted. A motion for approval of last year's meeting minutes was received by Linda Lentz and seconded by Dale Ebersviller.

Greg asked Linda Larson to review the financial report with the members. Linda provided a hard copy to each member and reviewed

Annual income from HOA dues total: \$ 75,600.00

Altana Bank Ending Balance as of May 31, 2018:

Checking Acct:	\$161,959.90	(Balance from Country Mutual Insurance)
Membership Share:	26.15	
18 Mo Certificate:	2,039.96	(Certificate will mature on 11/3/2018)

First Interstate Bank Ending Balance as of May 31, 2018:

Checking Acct:	\$ 24,800.93
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Expenses Incurred From June 1, 2017 – May 31, 2018 – Total: \$72,585.00

Declaration of Unit Ownerships 7



3382088
Page: 7 of 25
06/21/2006 10:20A

8. USE.

The primary use for which each unit is intended is that of a residential dwelling.

9. COMMON EXPENSES.

All the following Association expenses shall be charged to the unit owners as a common expense, according to each unit owner's percentage of undivided interest in the common elements:

- (a) Administrative expenses of the Association;
- (b) The cost of maintenance, repair and replacement of general and limited common elements, including landscaping care and snow removal, and the cost of maintenance and repair of the exterior surfaces of all buildings, except for replacement of glass and garage doors;
- (c) All utility bills for common areas and water to all units;
- (d) Casualty, liability and fidelity insurance premiums for the units and common areas, as provided in paragraph 8 of the Bylaws of Plymouth Place Homeowners Association;
- (e) The cost of keeping common water and sewer lines and secondary service lines in good repair and condition;
- (f) The cost of capital improvements, if such capital improvements are made with the express written consent of 90% of the unit owners and until completion of construction of all townhomes, with the consent of Developer.
- (g) Any other expense designated as common in this Declaration or in the Bylaws of the Association.

Expenses for maintenance or repairs due to the misuse or neglect of a unit owner shall be payable by such unit owner.

10. MEMBERSHIP IN PLYMOUTH PLACE HOMEOWNERS ASSOCIATION.

Each unit owner shall be a member of Plymouth Place Homeowners Association. Membership shall be appurtenant to and may not be separated from ownership of a unit. Owners shall be entitled to one vote in Plymouth Place Homeowners Association for each Unit owned. Developer shall have one vote for each uncompleted unit owned by it. When more than one person holds an interest in any unit, all such persons shall be members; the vote for such unit shall be exercised as the owners determine, but in no event shall more than one vote be cast with respect to any unit.

Number of Units



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Page: 1 of 3
10/03/2006 08:13A

Return To:
Pedersen & Hardy
1001 South 24th Street West, Suite 110
Billings MT 59102
File No. 32049

FIRST AMENDMENT TO DECLARATION OF UNIT OWNERSHIP
FOR PLYMOUTH PLACE TOWNHOMES

The undersigned being all of the owners of Plymouth Place Townhomes, do hereby amend the Declaration of Unit Ownership for Plymouth Place Townhomes, recorded June 21, 2006, under Document No. 3382088, records of Yellowstone County, Montana, as follows, to correct an error in that Declaration:

1. Section 6, Ownership, is hereby deleted in its entirety and replaced with the following:

1. OWNERSHIP.

Each unit, an appurtenant undivided interest in the common elements, the use of limited common elements reserved for that unit, membership in Plymouth Place Homeowners Association, and the assessment account for that unit shall be inseparable, and may be conveyed, devised or encumbered only as a whole. Any conveyance, encumbrance, judicial sale or other voluntary or involuntary transfer of an individual unit owner's interest in the common elements shall be void unless the unit to which that interest is attached is also included in the transfer.

Each unit owner shall be a fee simple owner of such unit and of an undivided interest in the common elements, subject to the provisions of this Declaration and the Bylaws of the Plymouth Place Homeowners Association. During construction of the project, each unit shall have an undivided 1/36 interest in the general and limited common elements. In the event of termination of the entire project prior to construction of 36 townhomes, the percentage of undivided interest in the common elements for each unit shall be adjusted by Developer, according to the formula set forth in the plan of development above.