

October 2025 Issue LXXI
Carolina Preserve
HOA NEWS

INSIDE THIS MONTH'S ISSUE:

It's Fall Y'all 1
President's Comments 2
Committee Reports 3
Treasurer's Comments 6
Secretary's Comments 7
ARC Submissions 8
ARC Makes it Easy For You 9
Compliance Corner 10
2025 Committees 11
2025 Task Forces 12
Board Members 13
Mark Your Calendar 13

*it's
Fall
y'all*



President's Comments

Hi Neighbors,

Can you believe it's already October? Fall has officially arrived — and with it comes cooler weather and beautiful fall colors. Personally, it is my favorite time of the year.

Our community always shines at this time of year. The changing leaves, decorated porches, and smiling faces make it feel extra welcoming. It's a great time to slow down a bit, enjoy the fresh air, and catch up with friends — old and new. We just had the CP Pocket Park meetup and there were about 35 people enjoying a hot coffee or cocoa with some delicious donuts. I talked to people I have known for 15 years and others just here for only 3 months. The common denominator was that they all were smiling and enjoying the sun and the beautiful North Carolina blue sky.

I am sure by now you have heard that after eight years with our current management company, our Board of Directors has made the decision to move in a new direction to better serve the needs of our community. While we appreciate the years of service our previous management team provided, it's no secret that the last several years have brought growing challenges and concerns.

After a careful and thorough review process — which included evaluating multiple qualified firms including KMG — we are pleased to announce that **First Service Residential (FSR)** will begin managing our community effective **January 1, 2026**.

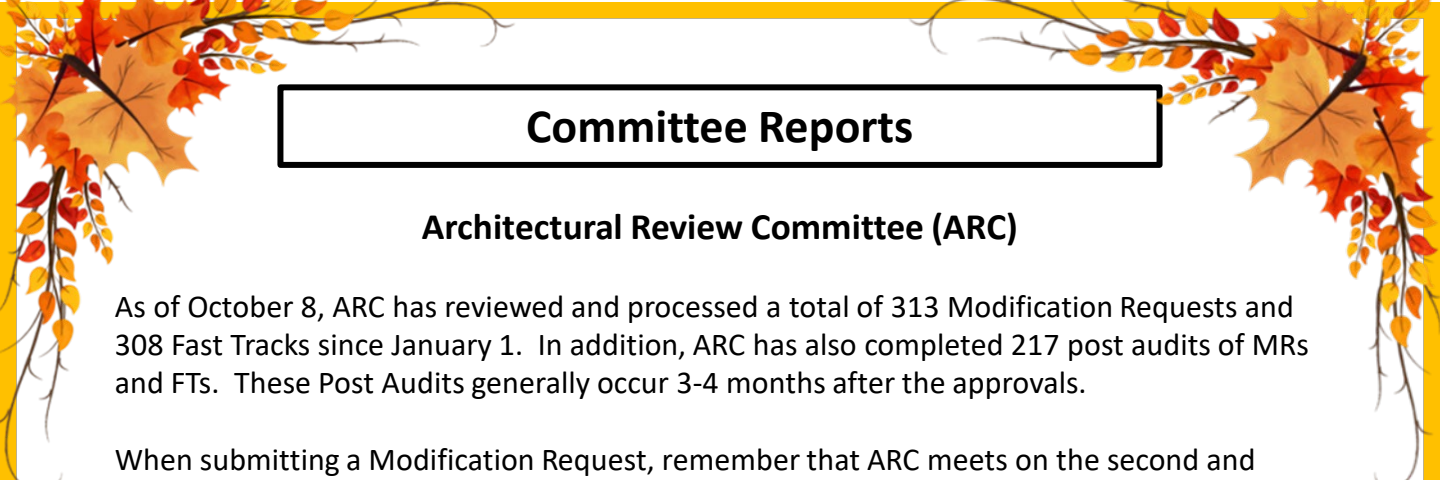
We're confident this transition will bring renewed energy and professionalism to our community. Thank you for your patience, input, and continued support as we take this important step forward together. Although you don't see it, the transition has started, FSR's HR. Department will be in this week or next to talk to the employees. As we get more information, we will share it with everyone.

As always, thank you to everyone who helps keep our community running smoothly — volunteers, my fellow board members, and all of you who make this such a great place to live.

Let's enjoy everything October has to offer. Take a walk, join a group, or just wave hello to someone new in the neighborhood.

Warmly,
Bob Muller





Committee Reports

Architectural Review Committee (ARC)

As of October 8, ARC has reviewed and processed a total of 313 Modification Requests and 308 Fast Tracks since January 1. In addition, ARC has also completed 217 post audits of MRs and FTs. These Post Audits generally occur 3-4 months after the approvals.

When submitting a Modification Request, remember that ARC meets on the second and fourth Wednesdays of each month. The Fridays prior to those Wednesdays are where ARC reviews and analyzes each submittal to be sure that there is a complete understanding of the project and that all the needed information is in hand.

All too often, a Plot Plan is missing with a MR submittal when homeowners are planning projects in their back or side yards. It is critical to know exactly where the property lines are located for most of these projects. If you don't have one, check with your neighbors on the sides and behind you to see if they have one. That can suffice in most cases.

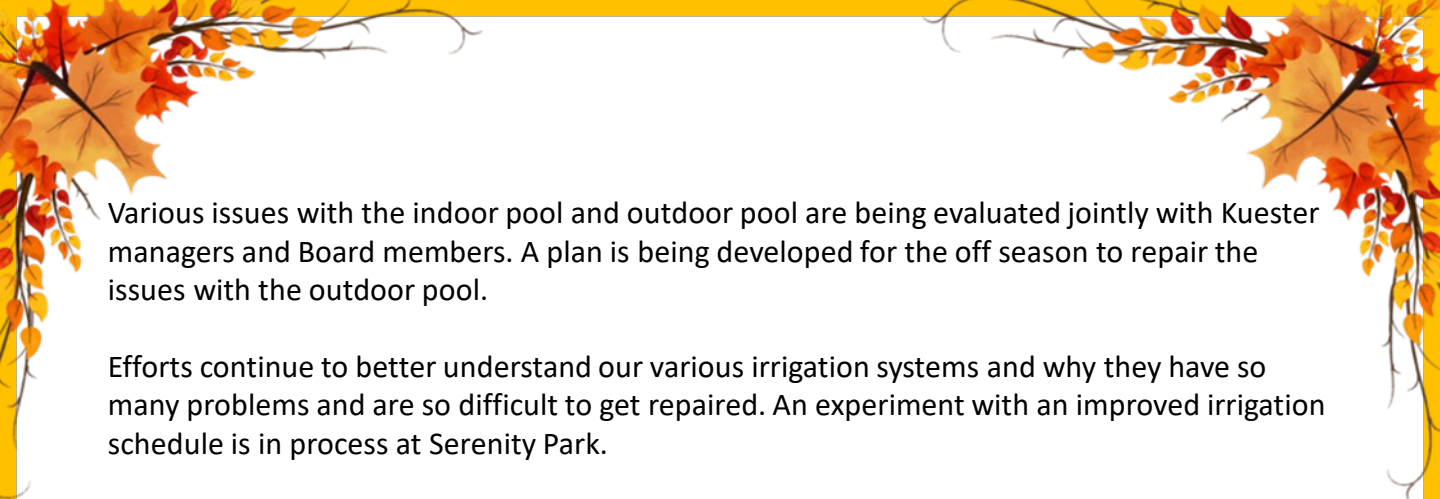
Facilities Committee(FC)

Did you know that Carolina Preserve is not very flat? There are at least 55 retaining walls to be maintained at CP. The FAC has reviewed the reported issues with these walls and prioritized those walls needing tree removal and additional stormwater repairs. Additional walls needing monitoring and further evaluation have been identified. Missing, cracked and dislodged blocks have been listed for repair.

In addition, 5 stormwater projects have been designated HOA responsibility and high priority for corrective actions. At least one is now completed, and contracts for the other 4 are expected soon. Up next: 5 more reported stormwater issues, designated medium priority, are being evaluated for responsibility before being cleared for bids and contracts.

The windows and outside walls at Bradford Hall need resealing, and a plan to best accomplish this in a long-term manner is being developed.

The HVAC systems at Bradford Hall have become a major concern, especially after our HVAC maintenance contract was abruptly cancelled 2 months ago. We then discovered various significant problem conditions that had not been reported by that contractor. We have contracted for a thorough assessment of the performance and condition of all of the 10+ HVAC systems. A well-qualified contractor has been selected to provide this assessment. Once completed, we will plan further needed repairs and/or equipment replacement.



Various issues with the indoor pool and outdoor pool are being evaluated jointly with Kuester managers and Board members. A plan is being developed for the off season to repair the issues with the outdoor pool.

Efforts continue to better understand our various irrigation systems and why they have so many problems and are so difficult to get repaired. An experiment with an improved irrigation schedule is in process at Serenity Park.

Finance Committee (FC)

The Finance Committee met on September 24. Members reviewed variances to the accounts assigned to them, with none being overly large, with the exception of landscaping, which was again under budget by \$15,000, due mainly to lower than budgeted slope stabilization and tree/shrub maintenance costs.

The Finance Committee also continued to refine the budget, including the reserve replacement expenditures.

Information Technology Committee (ITC)

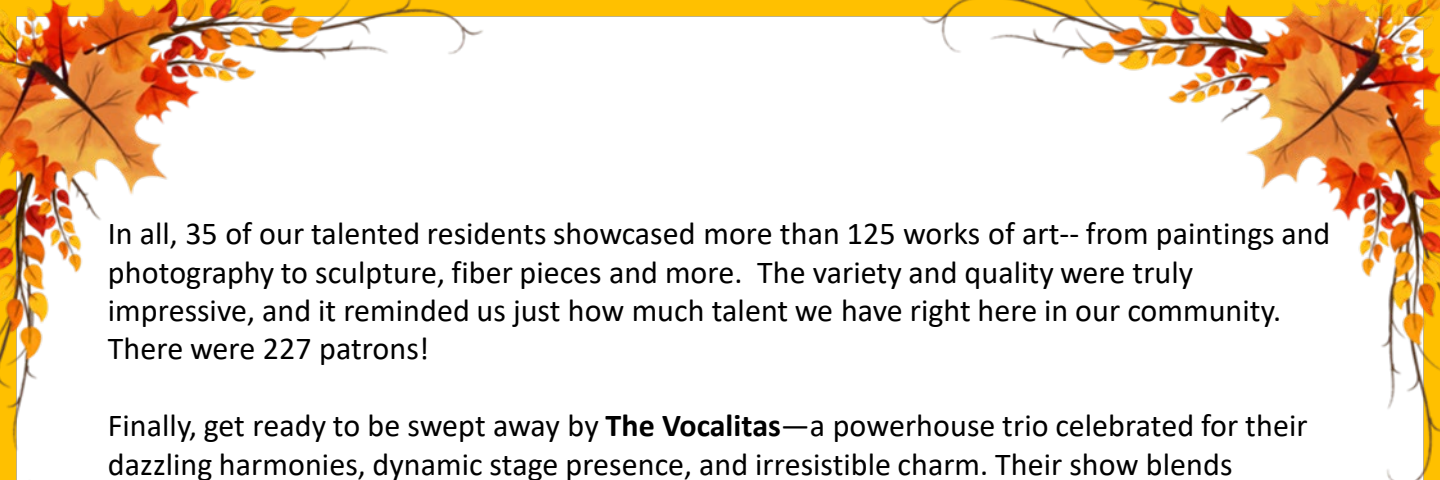
The FINAL ITC walk-in help sessions in Bradford Hall for 2025 will be on Thursdays, October 16, 23 and 30 from 12:30 pm till 2:00 pm. After that, your hard-working ITC members will be taking a break until 2026, so bring your technology hardware (smart phones, tablets, laptop/notebook computers) to the Wall Street Room this month to get answers to your technology questions.

Lifestyle Advisory Committee (LAC)

The Lifestyle Advisory Committee had some wonderful events in September and early October.

The last two Pocket Park Coffees of the year were very well attended. There are always lots of neighbors enjoying old and new friends. CP University sessions on Medicare, Leonardo da Vinci and The South China Sea were very interesting and well attended.

The Magnolia String Quartet was fabulous. Many, many popular tunes were enjoyed. We had such a fantastic time at our very first Resident Art Expo! It was a day filled with creativity, connection, and plenty of smiles as neighbors, friends and family came together to celebrate the arts.



In all, 35 of our talented residents showcased more than 125 works of art-- from paintings and photography to sculpture, fiber pieces and more. The variety and quality were truly impressive, and it reminded us just how much talent we have right here in our community. There were 227 patrons!

Finally, get ready to be swept away by **The Vocalitas**—a powerhouse trio celebrated for their dazzling harmonies, dynamic stage presence, and irresistible charm. Their show blends timeless classics, fresh new favorites, and a touch of holiday sparkle to create a one-of-a-kind musical experience that lifts your spirits and leaves you smiling. Whether you love smooth jazz, soulful ballads, or upbeat swing, **The Vocalitas** will take you on a joyful journey through song. Don't miss *Harmony in Motion* featuring **The Vocalitas**, coming to **Bradford Hall on Tuesday, November 25 at 7 PM**—an unforgettable night of music and magic!

Treasurer's Report

By Ron Lepionka, HOA Treasurer

Net income was \$49,000 for the month of August, compared to budgeted net income for the month of \$27,000, a favorable variance of \$22,000. Landscaping was under budget by \$16,000 due mainly to lower slope stabilization and tree/shrub maintenance costs. Maintenance expense was also under budget by \$4,000.

Year to date through August, income was \$186,000, compared to a budgeted loss of \$(49,000), a favorable variance of \$235,000. Resale Fees were favorable to budget by \$26,000 in the first 8 months. Interest income is \$8,000 higher than budget. Year-to-Date Landscaping costs were favorable to budget by \$130,000. We also have favorable variances of \$10,000 in service contracts, \$9,000 in payroll costs, \$14,000 in Master Association assessments, \$12,000 in Villas Services, and \$8,000 in expense for utilities.

Our Capital Reserves (made up of Replacement, IIF, Villa, SCM and Painting) total \$2.3 million at August 31, 2025. That includes our newly formed SCM Maintenance reserve fund of \$114,000.

We have \$1.6 million in CD's at a weighted average interest rate of 4.11%, and also had \$ 1.8 million in money market funds.

Our forecast for net income for the year now stands at about \$300,000, compared to the budget of \$66,000, which gives us some flexibility in how we allocated funds in 2026.

Also, our 2024 Financial Statement Audit and Tax Returns have been finalized and have been posted to the CP website.

Complete financial statements have been posted to the website.



Secretary's Report

By Stan Levine, HOA Secretary

There is an ongoing effort to review and update our Policies and Procedures:

The Board reviewed comments on the By-Laws in an ADHOC Working Session on September 24 from 10-12. Residents were able to watch but not participate. Not all comments were addressed and the Board will have to go through the remaining changes once the Secretary has provided an updated version. The attorney will also review the proposed changes and provide recommendations once the Board is finished.

The Compliance Policy that was renamed the Violations Resolution Policy was approved and reviewed by the attorney. The Covenants Committee is fully active.

The Facilities Use Policy is in the process of a major update and review. The draft will take at least another month to complete.

The next Board working Meeting is scheduled for October 28. The agenda and supporting documents are located where they always are: [CURRENT WORKING MEETING DOCUMENTS](#).* Residents should provide any suggested topics or changes through the Contact Us Form ([Contact Us Form](#))* and select the topic of "Comment/Question/Input on Board or Resident Meetings".

*Link requires Club Express login



Architectural Submissions

Everything you need to know for Architectural Submissions

A box labeled ARC Modification Request and Fast Tracks is beside the front entrance at Bradford Hall.



Note: All Modification Requests to be placed on the agenda for consideration MUST be turned in at Bradford Hall by Wednesday 12 noon, seven days before the scheduled meeting.

Meetings are held twice a month on the 2nd & 4th Wednesdays

Please note the box is for architectural requests only – no other forms of communication will be accepted through this box.

Email inquiries to
Architectural.Committee@cpamberly.net

or

Patrick Dzimiri, Compliance Coordinator: **compliance@cpamberly.net**



ARC Makes It Easy For You

If you are a new homeowner or are considering a change to the exterior of your home or yard for the first time, please pay close attention.

All the information you need to submit a Modification Request for ARC's approval can be found in the Design Guidelines, which are on the CP website. Start with "Governance", then "CP Documents", then "ARC Design Guidelines". The Guidelines can be a bit overwhelming at times, but please take the time to search for the applicable information for your project. If questions remain after your investigation, that's the time to email ARC for additional help. ARC is more than willing to assist but doing your homework first will expedite the processing of your request.

All too often, ARC is frustrated by the number of Modification Requests that are submitted that are missing essential information. Before ARC votes to approve MRs on the second and fourth Wednesdays of each month, we also meet on the preceding Fridays to identify MR shortcomings and assign ARC members to follow up with homeowners that have incomplete information. Actually, ARC receives the list of MRs from Patrick Dzimiri, Compliance Manager two days before the Friday meetings, so that each member of ARC can read through the MRs looking for problems.

We understand that some of the requirements may be difficult to achieve (photos and plot plans, etc.), but ARC would appreciate your best efforts. Occasionally, we make exceptions, but in some cases, there is no way to approve an MR without the required information. Paying close attention to the "MR Requirements" in red at the bottom of each Guideline is essential.

ARC makes every effort to gather the missing information between our Friday and Wednesday meetings so that the homeowner does not have to wait another two weeks or more for the next review cycle. One option for ARC is to return the deficient MR to the homeowner and simply state that it is missing some of the requirements, and for the homeowner to resubmit the MR for the next review cycle, which will delay the project.

ARC appreciates your cooperation in this matter.



Compliance Corner

*By Patrick Dzimiri, Compliance
compliance@cpamberly.net*

Hello All,

October is here!

We'll be looking at the overall appearance of the community to make sure that the standards set in the Carolina Preserve Declaration of Covenants and Architectural Design Guidelines are being adhered to. Additionally, we'll be making sure that everyone is following the rules as it pertains to political signs. Political signs you ask? Yes, Wake and Chatham Counties are holding a elections on November 4, 2025.

Per the Carolina Preserve Declaration of Covenants, Section C, Item J, elections signs must be removed within **7 days after the close of polls on Election Day.**

As a refresher, here are the links for the Declaration of Covenants as well as the Architectural Guidelines.

- Declaration of Covenants: [CPHOA Public Documents Center - 20231018 Restated Declaration of Covenants, Conditions, and Restrictions- Wake County.pdf - All Documents](#)
- ARC Guidelines: [ARC Guidelines](#)

Please note that I will be out of the office from October 31 - November 16th. In my absence, please contact the following for the appropriate concerns:

- ARC items: architectural.committee@cpamberly.net
- Compliance items: GM@cpamberly.net

Wishing you all a wonderful October!

Your Friendly ARC & Compliance Manager,

Patrick

compliance@cpamberly.net

2025 Committees

Architectural Review Committee (ARC)

John Bongino *Co-Chair* | Ken Merten *Co-Chair* | Ed Benfold
Bill Gurecki | Claire Hammitt | Kent Kjellgren
Board Liaison: Ron Madl | Staff Liaison: Patrick Dzimiri

Board Election Committee (BEC)

Darren Chesin *Chair* | Colleen Ferner *Vice-Chair* | Margaret Horst *Secretary*
Sharon Adamo | Michael Schwartz
Board Liaison: Bob Williams | Staff Liaison: Glenda Hunter

Club Advisory Committee (CAC)

Cynthia Jackson *Co-Chair* | Sandra Stein *Co-Chair* | Wanda Abel | Yvonne Gardner
Joel Glassman | Ed Hammitt | Ian Jagoda | Cara Lehman | Francine McElhinney
Board Liaison: Steve Rich | Interim Staff Liaison: Brian Kelly

Covenants Committee (CC)

Richard Martin *Chair* | Stephen Bowers *Vice-Chair*
Herb Blum | Bob Lamar | Eldon Pearce

Facilities Advisory Committee (FAC)

Doug Brugler *Chair* | Eric Haake *Vice chair* | Stephen Bowers *Secretary*
Ron Alexander | Dave Bangasser | John Bowser | Don Gallagher
Kent Kjellgren | Sue Lowery | Ken Merten | Dick Perkins
Susan Rezai | Rodger Shamblin | Ted Steinwender | Carl Wrublewski
Board Liaisons: John Kasarda | Staff Liaison: Josh Hughes

Finance Committee (FC)

Rahul Parikh *Chair* | John Adamo *Vice Chair* | Dennis Curtin
Colleen Ferner | Paul Wolf | Ted Young
Board Liaison: Ron Lepionka | Staff Liaison: Judy Mann

Information Technology Committee (ITC)

Alan DeCrane *Chair* | Bob Willenberg *Vice Chair* | Dennis Curtin
Jean Curtin | Brian Dos Santos | Jeff Hirsch | Margaret Horst
Board Liaison: Stan Levine | Staff Liaison: Glenda Hunter

Landscape Advisory Committee (LC)

Seeking volunteers

Board Liaison: Ron Madl | Staff Liaison: Judy Mann | Staff Rep: Patrick Dzimiri

Lifestyle Advisory Committee (LAC)

Christopher Reinhold *Chair* | Robert Azar | Harlean Botha | Alora Burton | Nadine Dunn
Jackie King | Genie Lazcano | | Alice Stenstrom | Betsy Stevens
Board Liaison: Steve Rich | Staff Liaison: Terrie Murray

2025 Task Forces

Energy Efficiency (EETF)

Kent Kjellgren *Chair* | Doug Brugler | Todd David
Board Liaison: Ron Madl | Staff Liaison: Josh Hughes

Software Assessment (SATF)

Dennis Curtin *Chair* | Margaret Horst | Bob Willenberg
Board Liaison: Stan Levine | FC Liaison: John Adamo
Staff Liaison: Glenda Hunter

2025 Board

Bob Muller

President,
Management Company & Attorney Liaison

Bob Williams

Vice President,
Assistant Secretary

Stan Levine

Secretary, ITC Liaison, SATF Liaison

Ron Lepionka

Treasurer, FC Liaison

John Kasarda

Member at Large, FAC Liaison

Ron Madl

Member at Large, ARC Liaison, LC Liaison,
EETF Liaison

Steve Rich

Member at Large, CAC Liaison, LAC Liaison

Mark Your Calendar

2026 Budget Review

October 16 | 10am

In person & virtual

Board Open Working Meeting

October 28 | 12pm

In person & virtual

HOA Annual Meeting

November 18 | 6:30pm

In person & virtual

Board Open Working Meeting

December 16 | 12pm

In person & virtual