

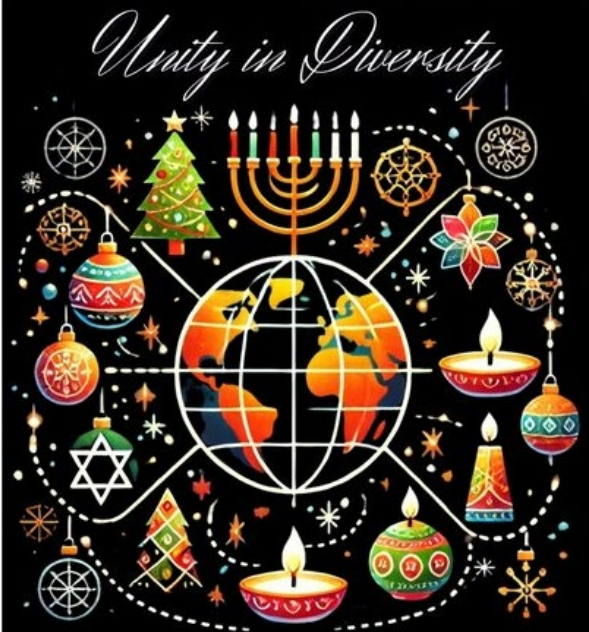
December 2025 Issue LXXIII

# Carolina Preserve

## HOA NEWS

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*Happy Holidays!*



## President's Comments

As we close out the year, I want to express my sincere gratitude to the residents of Carolina Preserve for your engagement, support, and trust throughout my term as President of the HOA Board. It has been a privilege to serve this remarkable 55-and-better community, that we are fortunate to call home, and I'm proud to report that 2025 has been one of meaningful progress. We have been fortunate also to have hired a very competent General Mgr. Judy Mann has made the end of the year that much easier. We will continue our efforts in the New Year with Judy as First Service Residential takes the reins in 2026.

At the beginning of the year, our Board committed to two clear priorities: **greater transparency** and **strong, accountable financial stewardship**. I'm pleased to say we have made substantial strides in both areas.

We increased transparency by improving communication. The board offered more frequent updates on Board activity ensuring that the residents have a voice to communicate their thoughts and ideas. This included more accessible meeting summaries, enhanced engagement at Board and committee meetings, more Townhall meetings and an open-door approach that encouraged dialogue and feedback.

We strengthened fiduciary responsibility through careful budget management, improved forecasting, and a disciplined approach to long-term planning. These efforts helped us maintain financial stability while continuing to invest in the amenities, maintenance, and enhancements that make Carolina Preserve such a special place to live.

None of this would have been possible without the dedication of our committees, counselors, volunteers, and the countless residents who contribute their time, expertise, and passion to our community life. Your involvement is what keeps Carolina Preserve vibrant, welcoming, and active.

As we look ahead to the new year, we remain committed to building on this foundation—continuing to **listen, communicate, and plan responsibly** for the long-term wellbeing of our neighborhood.

Thank you again for your support.

I wish all of you a Merry Christmas and Happy Holidays.

**Bob Muller**

## General Manager's Report

Dear Carolina Preserve Residents,

As we approach the holiday season and the close of 2025, I look forward to the start of 2026 with excitement for what we have planned for the community.

I am in weekly meetings with the First Service Residential Executive team, and the staff is busy working to organize and prepare for the transition. In coming weeks, we will start training on the FSR systems, and we aim to become proficient to assist all of you during this process.

In an email that I sent on December 2<sup>nd</sup>, it stated to expect a mailed letter from FSR. We were notified that those letters were delayed and mailed on Monday, December 8<sup>th</sup>. In the mailing, you should receive a statement for January 2026, and further information about your account. Thank you for your patience during this process.

It's been five months since I started as your General Manager, and I truly have enjoyed meeting the community, working with the staff, the committees, and the Board. I'm looking forward to several projects in 2026 that will improve the Carolina Preserve amenities. We are planning a resurfacing of the outdoor pool and pool deck, indoor pool deck, and spa. We will be pruning several trees around Bradford Hall, and painting the pergolas located near the Bocce Courts and Pool.

We have established a cadence with our landscapers, Yardnique and Brightview. Several dead shrubs and trees in the community were removed by Yardnique, and larger dead trees were taken down by Monster Tree Service this fall. We have been working with NC Drainage and Stormworx on drainage projects and SCM maintenance that will be ongoing throughout 2026.

We will be striving to improve upon our services, response times and communications moving forward. The staff is committed, and happy to serve the community. We all thank you and wish you Happy Holidays!

Sincerely,  
**Judy Mann**







# Amberly Report

By Dawn Schildhorn

Happy Holidays!

The Amberly Master President recently sent out a “letter to the community” that was filled with misinformation.

For example:

- CP’s legal counsel *disagrees* that the way the Master is operating is consistent with the Amberly governing documents and NC Law.
- The Bylaws amendment that was driven by the Board President, which would have only allowed homeowners to attend a small portion of Board meeting once every six months, *did not have “broad support”* of the membership, and was therefore not approved.
- *CP requested collaboration* from all Master Board members, all sub association Board members, and all homeowners for its proposed Bylaw amendment, which includes suggestions from two other sub associations who did collaborate on the document.
- *The Board President refuses to share the proposed Bylaws amendment with the Master HOA attorney for review*, after solely authorizing close to \$100,000 in legal fees this year alone, seemingly to limit transparency and your participation in the Master Association, including your attendance at meetings.
- *The CP proposed Bylaw amendment is consistent with the governing documents and NC Law, and would not have any “detrimental unintentional legal consequences.”*
- *NC Law and the Amberly governing documents do permit members with at least 10% of the total vote of the Association to call for a special meeting.* CP has over 40% of the total vote. CP has properly called for and requested a special meeting to be scheduled to vote on the CP proposed Bylaw amendment three separate times, but the Board President refuses to recognize the meeting or any action taken, despite her promises to schedule a meeting in her letter, which was not sent from the entire Master Board.
- The Master Board has still not provided bank statements for millions of dollars to be shared with me or the CP Board, despite numerous requests, as required by NC Law and the Amberly Governing documents.
- The Master Board President has called for a meeting for December 16<sup>th</sup> 2025 and made a motion to remove me from the Master Board on that date, despite that applicable NC Law does not permit Board members of non-profit corporations to remove fellow Board members.

If you have questions or concerns about any of the above, I urge you to write to the CP Board to let them know: [Community@amberlymaster.com](mailto:Community@amberlymaster.com)



## Committee Reports



### Architectural Review Committee (ARC)

For the year 2025, ARC has reviewed and processed a total of 359 Modification Requests and 353 Fast Tracks.

ARC needs help. For 2026, ARC is looking for two new volunteers. **If you have any interest in serving on ARC, please read below.**

ARC meets on the second and fourth Wednesdays of each month to vote on submitted Modification Requests, usually for about an hour, but only once a month in Nov. and Dec.

We also meet on the prior Fridays to review the submitted MRs and typically assign members to contact homeowners that submitted incomplete MRs. This is done by email or sometimes with a visit to the homeowner for additional clarification. The Friday meetings are about an hour with the possibility of some additional time committed to follow up assignments. On Thursdays prior to our Friday meetings, the Compliance Manager emails copies of all the submitted MRs and Fast Tracks for ARC members to read/review and make notes for the Friday discussions.

In addition, ARC members are assigned quarterly “post audits”, maybe a dozen each quarter where we drive around to view or possibly visit homeowners (usually backyard projects) to inspect completed MRs. Plus, ARC members typically have three or four 2-week On-Call assignments over the course of the year. The On-Call person responds to emails that are submitted to ARC when homeowners are looking for information and guidance.

If you are interested in being a member of ARC, please email:  
[architectural.committee@cpamberly.net](mailto:architectural.committee@cpamberly.net)

### Club Advisory Committee (CAC)

The Club Advisory Committee would like to extend our deep appreciation to Terrie Murray, Glenda Hunter, Oscar Esperanza and Brian Kelly for going “over and above” their duties to help our committee carry out our goals to serve the CP clubs. Thank you so much.

## Lifestyle Advisory Committee (LAC)

It's been another outstanding year of activities and learning at Carolina Preserve (CP.) The Lifestyle Advisory Committee (LAC) mission is to offer residents opportunities to connect, learn, and celebrate life together — and 2025 certainly delivered!

CP University continued to flourish, offering 43 lectures across 26 fascinating topics — from history and technology to art and current affairs. The impressive lineup of resident and guest speakers made CP University a true hub for lifelong learning.

Residents also enjoyed outdoor and nature-based programs, including a well-attended Audubon Bird Walk and a hands-on Gardening Seminar that helped both new and seasoned gardeners make the most of North Carolina's growing season.

The committee also focused on health and wellness, organizing a Health Screening Fair with testing stations for balance, grip strength, endurance, and vision. The event promoted awareness and proactive wellness among residents.

Art and volunteerism took center stage with the Resident Art Expo, showcasing the extraordinary creativity within our community, and the Volunteer Expo, which connected residents with the Board and various committees — helping new and longtime neighbors find ways to contribute their time and talents.

Community spirit thrived at the Annual Picnic, where laughter and friendly conversation filled the day. The committee also hosted Pocket Park Coffees, informal neighborhood gatherings held in four different CP parks, bringing neighbors together in relaxed outdoor settings.

Evenings were lively too! The LAC hosted four diverse evening entertainment events, offering something for everyone — from music to comedy.

Finally, the year concluded with a comprehensive Lifestyle Survey, giving every resident a voice in shaping the future of community programs and events.

Through all of these initiatives, the Lifestyle Advisory Committee continues to strengthen the sense of connection that makes Carolina Preserve such a special place to live. A big thank-you to the Board, Kuester, volunteers, and the 2025 Lifestyle Advisory Committee — and to every resident who participates, learns, and celebrates along the way!



## **Treasurer's Report**

**By Ron Lepionka, HOA Treasurer**



Net income was \$52,000 for the month of October, compared to budgeted net income for the month of \$23,000, a favorable variance of \$29,000. Landscaping was under budget by \$29,000 due mainly to lower perimeter, slope stabilization and tree/shrub maintenance costs. In addition, lower, maintenance, G&A, utilities and management costs offset and increase of \$17,000 in income taxes as our 2024 return was filed.

Year to date through October, income was \$288,000, compared to budgeted income of \$1,000, a favorable variance of \$258,000. Revenues were up by \$49,000 due mainly to resale fees, interest income, seminar revenue, vendor fair revenue and other income being higher than budgeted. Year-to-Date Landscaping costs were favorable to budget by \$175,000. We also have favorable variances of \$14,000 in service contracts, \$4,000 in payroll costs, \$17,000 in Master Association assessments, \$16,000 in Villas Services, and \$15,000 in expense for utilities. These favorable variances were offset by higher than budgeted income tax of \$15,000.

Our Capital Reserves (made up of Replacement, IIF, Villa, SCM and Painting) total \$2.4 million at October 31, 2025.

At October 31, we had \$1.6 million in CD's at a weighted average interest rate of 4.08%, and also had \$1.9 million in money market funds.

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 has received comments from the attorney on the latest version of the By-Laws. The Board will finalize it, approve/sign it at the December Meeting, and then post it to the community.

The Facilities Use Policy is in the process of a major update and review. The final draft has been completed and reviewed by the Board. It will be sent out to the community for comment.

An updated draft committee charter template is being drafted and will be sent to the committees to fill out.

The next Board Working Meeting is scheduled for December 23. The agenda and supporting documents are located where they always are: [CURRENT WORKING MEETING DOCUMENTS](#). Residents should provide any suggested topics or changes.



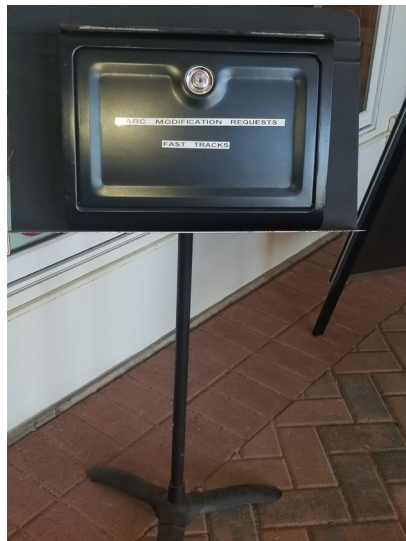


# Architectural Submissions

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 2<sup>nd</sup> & 4<sup>th</sup> 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](mailto:Architectural.Committee@cpamberly.net)**

or

Patrick Dzimiri, Compliance Coordinator: **[compliance@cpamberly.net](mailto: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.



# 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

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

## Facilities Advisory Committee (FAC)

Doug Brugler *Chair* | Eric Haake *Vice chair* | Stephen Bowers *Secretary*  
Ron Alexander | Dave Bangasser | John Bowser | 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

### 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

**Board Open Working Meeting**

**December 23 | 12pm**

**In person & virtual**