

SOUTH COAST HOMEOWNERS ASSOCIATION

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Newsletter Professional Sponsors

In late 1988, several association professionals met in Goleta to explore the feasibility of providing education to Association board members in the Santa Barbara community. Attorney Jim Smith drafted a letter to area homeowner associations discussing current issues pertinent to the operations and management of associations in our community. A post card was included with the letter to be returned if the association's board was interested in attending a meeting. 38(!) post cards were returned and our first meeting was held January 26, 1989 at the Goleta Public Library.

A lot has happened in the past 25 years but board members still need current information to help make informed decisions. Membership is at 200 associations, individuals and professionals. **Don't miss our 25th anniversary program on February 3 – details follow on page 2.**

2014 CONDOMINIUM BLUEBOOKS ARE IN STOCK

\$19/EACH POSTPAID

Checks may be sent to the address at the top of the page

The 2014 edition contains the new Davis-Stirling Act provisions including the new code section numbers as well as references to the old section numbers for cross-referencing. Books are being sent to renewing members as payments are received. This year would be a good year to obtain extra copies for each board member or for members to share.

**SOUTH COAST HOMEOWNERS ASSOCIATION INVITES YOU TO OUR
SPECIAL 25TH ANNIVERSARY CELEBRATION AND LAW AND LEGISLATIVE
UPDATE**

Our 2014 California law and legislative update has been scheduled with attorneys James Smith of Grokenberger and Smith and David Loewenthal of Loewenthal, Hillshafer & Carter. This popular program will feature legislative changes including the Davis-Stirling rewrite along with important case law decided in 2013. Don't miss it!

DATE – MONDAY – FEBRUARY 3, 2014

CHECK IN TIME – 6:15 PM

LEGAL UPDATE PROGRAM START – 7:15 PM

**PLACE – FROG BAR AND GRILL AT THE GLEN ANNIE GOLF COURSE
300 N. GLEN ANNIE ROAD, GOLETA (101 EXIT 108 NORTH).**

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Santa Barbara Painting

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Each sponsor will have a table with information and staff to answer your questions

Enjoy a complimentary glass of champagne and hors d'oeuvres served by the restaurant staff while you mingle and network with your peers and sponsors

No host bar also available

Numerous door prizes donated by professional members will be offered.

Member Cost - \$20 per person if paid before January 27

Nonmember Cost - \$35 per person

After January 27 - \$35 per person (subject to availability)

Checks only payable to South Coast Homeowners Association

Mail to - P. O. Box 1052, Goleta, CA 93116

Include Names of all attendees with your payment

Information:

Sandra Foehl – 805-968-3435 or sfoehl@msn.com

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SO YOU HAVE A LISTING IN A COMMON INTEREST DEVELOPMENT (CID) NOW WHAT?

**By: Sandra G. Foehl, CCAM
Coast Community Property Management, Goleta, CA**

Editor's Note: This article arose from the issues that Mrs. Foehl and other managers have in dealing with property sales, transfers and refinances. Sandie is a founding member of South Coast HOA and has provided HOA management services since the mid-1980s to area associations.

Santa Barbara County is full of them! Condominium Associations and Planned Developments. There are as many as 700 associations in the county ranging from 2 units to over 1,000 homes. All are managed by a volunteer Board of Directors and many are assisted by Professional CID (common interest development) Managers. Here is some information to be of assistance to you:

When you have your listing meeting with the seller, always get your preliminary association information from the owner. Today, owners should be well informed regarding most information that you will need including number of units, type of amenities, amount of the monthly assessment, what the assessment covers, rules, pets, age or rental restrictions, special assessments or pending litigation, name of insurance company and agent, parking spaces assigned or not. Thirty days before the start of the new fiscal year, each owner receives detailed disclosures on these matters as required by the California Civil Code. Ask your seller for a copy. It is not the responsibility of the Board or Management to provide this information to you so spend some time with your seller to gather the relevant information.

What information the owner(s) cannot supply, contact Management. Some examples of that kind of information would be the Owner Occupancy ratio and where you can place your sale and open house signs. ALWAYS check with Management before installing or placing any sign.

Gated or restricted access communities may present a showing or open house challenge. Be sure to find out how best to go about working with the association before you host any caravan or open house. You may need to enlist help from an assistant to direct prospects to your listing.

Most associations have a preferred pest control vendor. Make sure to determine the extent of the inspection needed and we recommend you do the inspection up front so that any questions about repairs and treatment responsibilities can be clarified. The association's CC&Rs and the California Civil Code specify what is owner vs. association responsibility. Never perform or arrange for any work to be done in any common area without first checking with Management or you could be stuck with the bill!

Most transfers of pool or HOA access keys, remotes or entry cards are addressed through escrow. The HOA is not responsible for the transfer of front door, storage or mailbox keys.

Management and Board Members may not for legal reasons, discuss association business or give opinions or answer questions from buyers or their agents. Any questions that come up

that cannot be answered by the owner(s), which is the first place to start, should then be submitted to the Association in writing.

Keep in mind that once an escrow is opened and a demand is submitted to the Association, all legally required documents that will equip a buyer to make their decision to purchase will be supplied. This demand is made upon either the Management, Accountant or designated Volunteer of the Association. Please inform buyers and their agents of this limitation. It will help avoid misunderstandings during the sales process. The fulfillment of the demand is a legal matter and certainly not an indication that the HOA is "hiding" anything.

Please impress upon the buyer the importance of reading all the materials supplied and if necessary obtain their own expert opinion or legal advice. The Association and its Management cannot interpret these materials for you. Buyers must do their own due diligence. This will make a better informed new owner and smoother transition. A happy and well informed new owner will be a welcome addition to the association. It will also promote good will and neighborliness. Imagine a new owner that neglected to read the governing documents, paying for that new purple paint on the front door only to find they must now pay to return it to the original HOA color or standard. There are also the neighbors that had to look at that purple paint!

Please note that there are fees associated with answering the escrow demand and providing documents to escrow and for loan processing assistance. Most associations and/or their management require payment for these documents in advance. We know this process is very important, so avoid telling us you needed it all "yesterday" or before contingencies expire. California Civil Code Sections 4525 – 4530 govern the required disclosures.

It is important once your purchase process starts that your contingency releases match what the Association is involved with. Any request for documents or assistance will be filled, once payment is provided (if any) within 10 days as allowed by the California Civil Code (Section 4530(a)). Please time your contingency releases accordingly. If additional information is requested during the loan process, additional fees will apply.

Buyers may want to attempt to try to request certain architectural modification information, such as "can we add a trellis, expand the unit, and change the fence, etc." during the purchase. Only owners may request architectural modification changes by going through the formal process that is identified in the governing documents and involves a hearing before a Committee and/or the Board. The Association cannot give an opinion or approval to a buyer. This request process is only available to an owner. It is always best to assume that you buy "as is". Looking around the complex and asking neighbors or attempting to reach a Board Member will not be binding to the association and will not be information that should be used in making the purchase decision in such matters. No one including the Volunteers or Management can give any type of verbal or blanket approval for any modification or rule variance beyond the legal documents.

Not all repairs and termite findings are the responsibility of the Association. If you have a pest report or home inspection that you think has items for the Association to review, please provide a copy with your request. Thank you and we can work together to make the sale process as smooth as possible.

The following disclosure form is from the new Davis-Stirling Act (Section 4528) and can be used to make the disclosures and costs required during the sales/purchase process.

California Civil Code Section 4528:

The form for billing disclosures required by Section 4530 shall be in at least 10-point type and substantially the following form:

CHARGES FOR DOCUMENTS PROVIDED AS REQUIRED BY SECTION 4525*

Property Address _____

Owner of Property _____

Owner's Mailing Address _____ (If known or different from property address.)

Provider of the §4525 Items:

Print Name *Position or Title Association or Agent*

Date Form Completed

Check or Complete Applicable Column or Columns Below:

Document	Civil Code Section	Included	Not Available (N/A) or Not Applicable (N/App)
Articles of Incorporation, or statement that not incorporated	§4525(a)(1)		
CC&Rs	§4525(a)(1)		
Bylaws	§4525(a)(1)		
Operating Rules	§4525(a)(1)		
Age Restrictions, if any	§4525(a)(2)		
Pro Forma Operating Budget or Summary, including Reserve Study	§5300 and §4525(a)(3)		
Assessment and Reserve Funding Disclosure Summary	§5300 and §4525(a)(4)		
Financial Statement	§5305 and		

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Review	§4525(a)(3)		
Assessment Enforcement Policy	§5310 and §4525(a)(4)		
Insurance Summary	§5300 and §4525(a)(3)		
Regular Assessment	§4525(a)(4)		
Special Assessment	§4525(a)(4)		
Emergency Assessment	§4525(a)(4)		
Other unpaid obligations of seller	§5675 and §4525(a)(4)		
Approved Changes to Assessments	§5300 and §4525(a)(4), (8)		
Settlement Notice Regarding Common Area Defects	§4525(a)(6), (7) and §6100		
Preliminary List of Defects	§4525(a)(6), §6000 and §6100		
Notice(s) of Violation	§5855 and §4525(a)(5)		
Required Statement of Fees	§4525		
Minutes of regular meetings of the board of directors conducted over previous 12 months, if requested	§4525(a)(10)		
Total Fees for these documents:			

*The information provided by this form may not include all fees that may be imposed before the close of escrow. Additional fees that are not related to the requirements of §4525 may be charged separately

TAX AND REGULATORY CONSIDERATIONS FOR SMALL COMMON INTEREST DEVELOPMENTS

By: Michael J. Gartzke, CPA

Author's Note: I was recently asked by one of our professional members if I could detail some of the tax and regulatory filings that an association might have to do, especially for a smaller association that is self-managed. There is a lot to keep track of!

INCOME TAX FILINGS

FEDERAL

Employer (Tax) Identification Number (EIN) – All associations must file for an EIN with the IRS. IRS Form SS-4 is used for this purpose. IRS also has an online process on its website www.irs.gov. This number is used in all Federal and state income tax filings. Banks will also require the number to open bank accounts. If you are a new director or manager for an existing association, you should be able to find the number on a 1099-INT issued by the bank for interest earnings or a prior year tax return. The association's tax preparer will have the number.

Federal Income Tax Return - Form 1120H or 1120 – All associations, no matter what size, must prepare and file a tax return with the IRS at the end of each year. For a calendar year association (December year-end), the return is due March 15. A six month extension of time can be obtained by filing IRS Form 7004. For many small associations, form 1120H (for homeowner associations) is used to report exempt function income (assessment) and exempt function expenses (utilities, insurance, repairs, etc.). Nonmember income such as interest and dividends are taxable. In some instances, it is possible for the association to file form 1120. Consult with a qualified tax preparation professional to see which form is right for you.

Payment of Tax – If tax is owed on a Federal return, the tax must be remitted using the IRS Electronic Funds Tax Payment System (EFTPS). Go to www.eftps.gov to enroll in the program or make a payment. To enroll, you will need the association's name, mailing address and EIN. You will also need the routing number and bank account number. IRS will issue a PIN to access your account information when making a payment. To make a payment, you will need to know the tax form and period for the payment to be applied to.

CALIFORNIA

Subject to Minimum Tax – All corporations are taxable when formed in California. As such, they are subject to an \$800 per year minimum tax by the California Franchise Tax Board (FTB). To obtain tax-exempt status under Revenue and Taxation Code (R&TC) 23701(t) (no longer subject to the minimum tax), the Association must file Form 3500 with the Franchise Tax Board. Governing documents and income and expense information is submitted to the FTB. If the association has been in existence for several years, they may request some additional information to verify that the Association qualifies as tax-exempt. If the association

has tax-exempt status, then it is only subject to tax on its nonmember income such as interest and not on its assessments.

Verify if association is tax exempt – The FTB has a list on its website listing all tax-exempt corporations in California. The list shows the California Corporation Number (different than the EIN), the same of the corporation, the city, the fiscal year-end, what R&TC is corporation is exempt under and whether the corporation is “active” or “suspended” by the California Secretary of State (SOS) or FTB. See discussion of suspended corporate status following. The list can be located using the search feature on the FTB home page (www.ftb.ca.gov) or by accessing the following link directly:

https://www.ftb.ca.gov/businesses/Exempt_organizations/Entity_list.shtml

Check to see if exempt status has been revoked – Recently, the FTB contacted many associations and other tax-exempt organizations in its database in an effort to determine if the organizations still existed. Those that did not respond to their inquiries have had their exempt status revoked. If you believe that your association had been exempt at some point and you cannot locate it on the tax-exempt list, you can check the revoked exempt organization list at:

https://www.ftb.ca.gov/businesses/Exempt_organizations/Revoked_Entity_list.shtml

If your association’s exempt status has been revoked, you will need to file for it again using FTB Form 3500 referenced earlier.

California Income Tax Return – Form 100 – If the association has more than \$100 in nonmember income (e.g. interest), then it is required to file a corporate income tax return with the FTB (even if it is not incorporated). Form 100 is used for this purpose and any taxable income is taxed at a flat rate of 8.84%. Payment can be made by check and quarterly estimates may be required in future years (Form 100-ES). I recommend that even if the association has less than \$100 of nonmember income, the association should file the return anyway to stay in the FTB’s system and not have to deal with FTB correspondence later about why you didn’t file a return.

Small Tax Exempt Organizations – Electronic Return Form 199N – Tax-Exempt Organizations which have \$50,000 or less in total revenues (assessments, interest, laundry income, etc.) must file an information return electronically each year with the FTB. Complete filing instructions and information needed can be found here:

https://www.ftb.ca.gov/businesses/Exempt_organizations/Filing_Requirements_Form_199N.shtml

There is no filing fee with the 199N filing. The return is due 4 ½ months after the end of the fiscal year (May 15 for a calendar year association). A small association can also file a paper form 199. See discussion following

Exempt Organization Annual Information Return – Form 199 – For tax-exempt organizations whose gross revenues are greater than \$50,000, a paper Form 199 is filed with the FTB. There is a \$10 filing fee to remit with this form (none if less than \$50,000 in revenues). The return is due 4 ½ months after year-end but is automatically extended six

months, if needed. If the form is filed after the extension period, the fee can increase to \$65 plus interest. An association with revenues less than \$50,000 can elect to file a paper 199 instead of the 199N.

Corporate Filings – California Secretary of State

Articles of Incorporation – Corp # - When an association is incorporated, it submits Articles of Incorporation to the California Secretary of State (SOS). SOS assigns a 7-digit corporation number and returns the recorded articles to the association.

Statements of Information and Common Interest Development – Every two years, Associations are required to file these two separate statements with the SOS. The Statement of Information lists corporate officers, agent for service of process (who gets the papers if the Association gets sued) and if the Association is subject to the Davis-Stirling Act (yes). A \$20 fee is required. This form can be filed online. The Statement of Common Interest Development asks for information about the managing agent, President, the number of units/lots and the streets the association is located. There is a \$15 fee to file this form but it cannot be filed online. These forms are due at the end of the incorporation month of the association. For example, if an association was incorporated on March 6, 1984 (even year), its forms would be due on March 31st of every even year. An association incorporated on August 30, 2003 (odd year) would have its forms due on August 31st of each odd numbered year.

The SOS usually mails out a postcard to the address it has on file for the Association about 90 days before the forms are due. If there has been a change in officers or management in the past two years, you may not receive the postcard. Forms are no longer mailed to the Association. Until recently, the SOS office was severely backlogged in processing these forms. In some cases, it took the SOS 4 months or more to process these filings. As of January 2014, the processing time is down to two weeks. Forms that are incomplete or not completed correctly will be returned to you for correction. Do not set these aside. Refile them as soon as possible. If there has been a change in the address, officers or agent of service during the two-year period, an amended filing can be done at no charge.

The SOS forms are not tax forms. These forms are not prepared as part of the income tax return process. The incorporation month is not the same as the fiscal year-end in most cases so the due dates will not coincide. Since the SOS forms are due every two years and income tax returns are filed annually, there's no correlation of the due dates at all. These forms can be completed yourself or by your managing agent. Your tax preparer may be able to assist.

Penalty for failure to file – If the association does not file the SOS statements by the due date, the SOS will impose a \$50 per return penalty for failure to file. What can be confusing about the penalty is that the penalty notice comes from the Franchise Tax Board even though it is an SOS penalty. So when the notice is received from the FTB, an association may think it is an income tax penalty or fee and not realize that it is from not filing with SOS. If you receive any notice from the FTB (or the IRS), have your tax preparer review it to understand the nature of the charges. Failure to file the SOS statements can lead to Corporate Suspension. See discussion following.

Third Party Solicitations – Some companies do mass mailings offering to prepare annual meeting minutes for the Association. The solicitation suggests that you are meeting state requirements if you use their “service”. The following is from the SOS website:

“The Secretary of State’s office has been advised that solicitation letters are being sent to California businesses encouraging them to comply with their California Corporations Code filing obligations by submitting fees and documents to a third party rather than by filing directly with the Secretary of State’s office.

Posted February 19, 2009

Misleading Statement of Information Solicitations: Certain private companies have been soliciting business through mass mailings to corporations and limited liability companies with a solicitation similar to a Statement of Information that is required to be filed with the Secretary of State.

These solicitations are not being made by the California Secretary of State’s office and are not being made by or on behalf of any governmental entity. Although a business entity can use an intermediary to submit filings and fees to our office, no business is required to go through another company in order to file its documents with the Secretary of State’s office.”

Corporate Suspension - What is Corporate Suspension?

A suspended corporation has no corporate powers in the eyes of California law. Why does this matter? Under California Revenue and Taxation Code (R&TC) Section 23304.1(a), “Every contract made in this state by a taxpayer during the time that the taxpayer’s corporate powers, rights and privileges are suspended or forfeited pursuant to Section 23301, 23301.5 or 23775 shall, subject to Section 23304.5, be voidable at the instance of any party to the contract other than the taxpayer.” Section 23304.5 requires that a lawsuit be brought by the other party in order for the contract to be voided. This could be problematic for a suspended association in the following situations:

- a) A dispute arises in a maintenance contract (roofing, painting, landscaping, etc.) and the dispute cannot seem to be worked out other than through the courts. If the association’s corporate powers are suspended, the other party could void the contract and/or the association has no ability to enforce the provisions of the contract since the association is suspended.
- b) The association is involved in construction defect issues that lead to litigation. Should the corporation be suspended, it cannot pursue the legal remedies permitted until the corporation is “revived”.
- c) The association is attempting to collect delinquent assessments from a homeowner. Liens could not be enforced or small claims could not be pursued if the association has its corporate powers suspended. The inability to secure the association’s assessments during a suspension period could result in lost assessments by the association.
- d) If an association is looking to obtain a bank loan to make major repairs, it cannot do so if its corporate status is suspended.

e) Without corporate powers, the association may not be able to enforce any provisions of its governing documents (CC&Rs, etc.)

f) Board members may not have the immunities provided by the Davis-Stirling Act if the corporation is not active.

How does suspension occur? – Corporate powers can be suspended by either the SOS or FTB. Listed below are several scenarios that have occurred in my practice that I believe are not unique but occur regularly:

a) Suspension soon after incorporation – The association was incorporated by the developer's attorney in 1983 and but was suspended in 1985 for failure to file tax returns or pay the California minimum tax. This 5-unit association was built, had a bank account with the manager's tax ID number. Mailing addresses had changed from the attorney to one or more of the owners to the manager over the years. Notices sent by the FTB may not have been received or returned to the FTB due to the change in address. The suspension was discovered when management changed in 1999, fourteen years later.

b) Suspension due to failure to file Statement of Information – As noted in the first scenario, association mailing addresses can change frequently. If the association uses an officer's mailing address or its management company's address as its mailing address, there is a strong possibility that the postcard from the Secretary of State will not be forwarded to the correct address when officers or managing agents change. Follow-up notices, penalty notices and suspension notices will likewise not be forwarded. This was a problem when the Statement of Information was an annual filing. Now that the statement is filed every two years, nonfiling will probably increase, resulting in more suspensions. Filing forms and requirements can be found at the Secretary of State's website – www.sos.ca.gov. Missing one filing but making the subsequent filings does not "revive" the corporation.

NOTE: Your first tip that the Association may be headed towards suspension is the imposition of the \$50 SOS penalties by the FTB.

c) Suspension for failure to file FTB Tax Form 199 – An association was suspended in 1987 because it had not filed a Franchise Tax Board Form 199 form for 1986. In order to "revive" (meaning restore corporate status), the association had to file a 1986 Form 199 (fifteen years later!).

d) Suspension for failure to file CA FTB Tax Forms 100 and 199 and pay resulting penalties – While this can happen due to the address, officer or management changes noted above, it can also happen due to the negligence of the financial managing agent.

What happens when the tax returns are not filed? Demand notices and penalty notices are sent by the FTB. If no response is received, a series of letters threatening forfeiture of the corporation commence leading to the eventual suspension of the corporation.

Associations with \$50,000 or less in annual gross receipts are not required to file Form 199 with the Franchise Tax Board but can file the 199N noted above. . However, if the association's corporate status becomes suspended, then the FTB will require that all past

year's 199s be filed and the resulting, fees and penalties be paid even if receipts are below the normal filing requirements.

How do you find out if an association is suspended? Some information from the Statement of Information filing is maintained on a database on the Secretary of State's website – <http://kepler.sos.ca.gov/> Enter the corporation's name or a portion of the name (if you are not sure of the exact name) to obtain name matches and corporate information. For example, I entered "Summerland Association" and 6 matches were returned. One of which was a suspended homeowners association, the Summerland Villas Homeowners Association. A "click" on the corporate name generated another report showing the corporation mailing address and the agent for service of process mailing address. It does not show when the corporation was suspended, just that it is suspended.

You can also access the FTB suspension information from the FTB exempt organization list noted earlier:

https://www.ftb.ca.gov/businesses/Exempt_organizations/Entity_list.shtml

If the association has made all its income tax filings but not the SOS statements, the FTB list will show that it is active under FTB but suspended under SOS. Conversely, if tax returns have not been filed, the FTB will show it suspended but SOS will show it active.

Contact phone numbers are listed on both the SOS and FTB websites. If your corporation is suspended, they can provide information as to what is needed to "revive" the corporation to active status.

Other Tax and Regulatory Issues:

1099s: Association may obtain services from independent contractors such as landscapers, handymen, pool service, janitorial and professional services. If payments are made during the calendar year totaling \$ 600 or more to a noncorporate provider of these services, then Form 1099s are to be issued in January to the service provider by the association and submitted to the Internal Revenue Service by February 28. You will need the name and address of the service provider, the amount paid to the provider during the calendar year (even if the association is on a fiscal year) and the provider's EIN or social security number. Management and bookkeeping services should prepare these forms as a part of their services to you. If you do them yourself, forms are available from the IRS.

Payroll vs. Independent Contractor – If you employ someone on a regular basis to provide services for you, it is possible that IRS and the state might consider them to be employees and subject to tax withholding and reporting (W2s, etc.) This should not occur often in a small association as the amount of services provided would be small or done on a contract basis. See workers comp following.

New Employee and Independent Contractor Reporting – The California Employment Development Department (EDD) requires employers to report newly hired or rehired employees to the Department using form DE-34 within 20 days of hiring.. For independent contractors, reporting is required for sole proprietors using form DE-542 when payments are expected to exceed \$600 in the calendar. Form DE-542 is used to report independent

contractor. This interim reporting is required to assist the state in collecting delinquent child support obligations.

Workers Compensation – Associations should carry workers comp insurance in the event that you hire someone who does not have a contractor's license to provide services for which a license is required (greater than \$500). When contracting for maintenance and repair services you should insist on receiving evidence of liability insurance and workers comp coverage from the contractor. If the contractor does not have coverage and if he or one of his employees gets hurt on the job, the association would be considered the employer and only a workers compensation policy would cover the claim, not the association's liability policy.

Property Tax/Special Districts – Associations occasionally pay property taxes. Typically, taxes would be assessed only on a unit that the association owns. Property tax on the common area is usually allocated among all the property owners on their own property tax bills. However, the County Tax Collector collects fees and charges for special districts within the County. A common fee is a sanitary district charge. There may be charges for other districts such as vector control (mosquito abatement), library taxes or parcel taxes. Contact phone numbers appear on tax bills if you have any questions about the charges and whether they should apply to the common area parcels.

Pool Inspection – County health departments will inspect pools and spas on an annual basis to determine if current laws and regulations are being met. A permit is issued once any necessary repairs are made. The permit is required to be displayed in the pool/spa area. An annual fee is charged based upon the number of pool/spas the association has.

Backflow Device Testing – If your association has backflow devices in its water system, the devices are subject to periodic testing by a qualified plumbing contractor. A testing form is submitted to the City or County once the testing successfully concludes. Any deficiencies must be repaired and re-tested before the tests are submitted.

Well Testing – If your association uses potable water from a well, the county health department will require frequent testing to verify the water from the well is safe. County health will also make frequent visits to the well site.

Elevator – If your association has an elevator, it must be inspected periodically by the California Department of Industrial Relations (DIR). Once inspected and passed, a permit is posted inside the elevator showing when the elevator was inspected. Any deficiencies noted in the inspection or periodic testis must be corrected before a permit will be issued.

Fire Inspection - Some cities and fire districts may have an inspection program for public spaces such as a meeting room or clubhouse. They may bill a separate fee for these inspection services.

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Santa Barbara, CA 93103
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FINANCIAL SERVICES

Union Bank

Judy Remley

400 Esplanade Dr. #101
Oxnard, CA 93036
888-539-9616

Mutual of Omaha Bank

Lisa Ann Rea

1534 N. Moorpark Rd #306
Thousand Oaks, CA 91360
866-800-4656

ASSOCIATION MANAGEMENT

**Coast Community Property
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Sandra G. Foehl, CCAM

P. O. Box 8152
Goleta, CA 93118
805-968-3435

St. John & Associates

Kristin St. John CCAM

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805-683-1793

Team HOA

Geoff McFarland

720 Vereda del Ciervo
Goleta, CA 93117
805-562-8482
www.teamhoa.com

Crowley Management Company

Bill Crowley

P. O. Box 286
Summerland, CA 93067
805-684-0989

Spectrum Property Services

Cheri Conti

1259 Callens Rd #A
Ventura, CA 93003
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**Professional Association
Management**

Paula Scott

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P Walters & Co

Patti Walters

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805-689-8485

**River Road Properties &
Management**

Mark Corliss

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Santa Barbara, CA 93110
805-452-4497

RESERVE STUDIES

Stone Mountain Corporation

Chris Andrews

P. O. Box 1369
Goleta, CA 93116
805-681-1575
www.stonemountaincorp.com

Reserve Studies, Inc.

Les Weinberg

9420 Topanga Canyon Blvd.
#201
Chatsworth, CA 91311
800-485-8056
www.reservestudiesinc.com

INSURANCE

Timothy Cline Insurance Agency
Tim Cline, CIRMS
725 Arizona Ave #100
Santa Monica, CA 90401
805-299-0899

Bill Terry Insurance Agency
Barbara Terry
3887 State Street #201
Santa Barbara, CA 93105
805-563-0400

Baxter Insurance Services
Dan Baxter
225 East Carrillo #201
Santa Barbara, CA 93101
805-963-4048

CONTRACTORS

All Seasons Restorations & Construction ('13)
Kirk Prouse
1830 Lockwood St #107
Oxnard, CA 93036
805-988-1040

Blake Fuentes Painting, Inc.
79 S. Kellogg Avenue
Goleta, CA 93117
805-962-6101

Acme Detection
Gary Fuller ('13)
1081 E. Mountain Drive
Santa Barbara, CA 93108
805-565-LEAK (5325)

General Pavement Management
Casey Forster ('13)
240 Quail Court
Santa Paula, CA 93060
805-856-8163

United Paving
Justin Rodriguez ('13)
3463 State Street #522
Santa Barbara, CA 93105
805-563-4922

LANDSCAPE CONTRACTORS

Kitson Landscape Management, Inc.
Sarah Kitson & Mike Waggoner
5787 Thornwood Drive
Goleta, CA 93117
805-681-7010

Better Earth Landscape
Bill Kehoe ('13)
1448 Lou Dillon Lane #B
Santa Barbara, CA 93103
805-965-5678

TriValley Landscapes
Colin Anderson
35 W. Main Street, Suite B
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805-535-0119

Plowboy Landscapes, Inc.
Doug Wasson ('13)
2190 N. Ventura Ave
Ventura, CA 93001
805-643-4966 ext 13

ORGANIZATIONS

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805-658-1438
www.cai-channelislands.org

Executive Council of Homeowners - ECHO
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