

SOUTH COAST HOMEOWNERS ASSOCIATION

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Newsletter Professional Sponsors

2015 ANNUAL LAW AND LEGISLATIVE UPDATE

As we celebrate our 26th anniversary providing educational opportunities for Association board members and those serving area homeowners associations, please join us for our annual law and legislative update. Numerous laws were passed in 2014, effective in 2015 and several significant California court cases were decided that affect association management and operations. Our speakers will be:

James H. Smith, Grokenberger & Smith, Santa Barbara

David A. Loewenthal, Loewenthal, Hillshafer & Carter, Woodland Hills

In addition to the update, there will be time for a moderated, written question and answer session at the end of the presentations.

Date – Wednesday, January 21, 2015

Time - 6:15 – 7:00 PM – Hors d’oeuvres and networking
7:00 – 9:00 – Program

Place – Glen Annie Golf Club – Frog Bar & Grill
405 N. Glen Annie Road, Goleta (One block north of Cathedral Oaks Road)

Cost - \$25 per person – limited to 80 attendees. Mail your check and list of attendees to the P. O. Box shown above. Last year’s program sold out. See enclosed invitation.

ELECTIONS – IS YOUR ASSOCIATION PREPARED?

By William S. Dunlevy, Esq.

Law Offices of William S. Dunlevy

Editor's Note: Mr. Dunlevy is an attorney in Camarillo, CA who has provided legal services to homeowner associations for many years. He served as editor of the CAI-Channel Islands magazine for 26 years. This article appeared in that publication and is reprinted here with the author's permission.

We are entering the time of year when many associations will be conducting their annual elections for directors. Is your association prepared? This article will discuss some things you should know about the law regarding elections and associations.

Adoption of Election Rules. Has your association adopted election rules? If not, your association is currently in violation of California law. Civil Code section 5105 requires all California community association to adopt election rules that do all of the following:

1. Ensure that any candidate or member advocating a point of view is provided access to association media, newsletters, or Internet Web sites during a campaign. The association may not edit or redact any of the content from items posted by the candidates or members, but may include a statement specifying that the candidate or member, and not the association, is responsible for that content.
2. Ensure access to any common area meeting space during the campaign, at no cost, to all candidates, including those who are not incumbents, and to all members advocating a point of view, whether or not the association supports the views of such members.
3. Specify the qualifications for candidates for the board and any other elected position, and procedures for the nomination of candidates, consistent with the association's governing documents. Any member must be allowed to nominate himself or herself for election to the board of directors.
4. Specify the qualifications for voting, the voting power of each membership, the authenticity, validity, and effect of proxies, and the voting period for elections, including the times at which polls will open and close, consistent with the governing documents.
5. Specify a method of selecting one or three independent third parties as inspector or inspectors of election, by either (1) appointment of the inspector(s) by the board, (2) election of the inspector(s) by the members of the association, or (3) any other method of selecting the inspector(s).
6. Allow the inspector(s) to appoint and oversee additional persons to verify the signatures and to count and tabulate votes as the inspector(s) deem appropriate, provided that the persons are "independent third parties" as defined in Civil Code section 5110.

In addition to the foregoing, the election rules may, but are not required to, provide for the nomination of candidates from the floor at membership meetings or nomination by any other means. The rules may also permit write in candidates on the ballots.

Remember, in adopting any new or modified rules covering the subjects specified in Civil Code section 4355, including election rules, the board must provide “general notice” (see Civil Code section 4045) to the members at least thirty days before an open board meeting at which the board will consider adopting the proposed rule change(s). The notice must include a text of the proposed rule change(s) and a description of the purpose and effect of the proposed rule change(s). The members are entitled to make oral or written comments on the proposed rule change(s) and the board is to take such comments into consideration in adopting the proposed rule change(s).

Inspector(s) of Election. The inspector(s) of election must be “independent third parties.” What does this phrase mean? According to Civil Code section 5110, an independent third party may be:

1. A member of the association, but may not be a director or a candidate for director or be related to a director or a candidate for directors;
2. A volunteer poll worker with the county registrar of voters;
3. A licensee of the California Board of Accountancy; or
4. A notary public.

An independent third party may not be a person, business entity or subdivision of a business entity who is currently employed by or under contract to the association for any compensable services unless expressly authorized in the association’s election rules. If the association does not have appropriate association members willing to serve as the inspector(s) of election, the association will have to hire one of the other “independent third parties” to oversee the election.

What are the duties of the inspector(s) of election? They are:

1. To determine the number of memberships entitled to vote and the voting power of each member;
2. To determine the authenticity, validity, and effect of proxies, if any;
3. Receive the ballots;
4. Hear and determine all challenges and questions in any way arising out of or in connection with the right to vote;
5. Count and tabulate all votes;
6. Determine when the polls close;
7. Determine the tabulated results of the election; and
8. Perform any acts as may be proper to conduct the election with fairness to all members, in accordance with applicable laws and the association’s own election rules.

Secret Ballots. Some types of votes require the use of a secret written ballot with a two envelope system. Per Civil Code section 5100(a), the association must use the secret written ballot, two envelope procedure for membership votes on the following matters:

1. Elections regarding assessments that legally require a membership vote;
2. Election and removal of directors;
3. Amendments to the governing documents (the text of proposed changes must be provided with the ballot); and
4. The grant of exclusive use of common area, if required pursuant to Civil Code section 4600.

The secret ballot procedure requires that the association members be sent a written ballot with two envelopes. The ballot itself is not signed by the voter, who inserts the ballot into the first envelope and seals the envelope. The first envelope is then inserted into the second envelope. In the upper left hand corner of the second envelope, the voter signs the voter's name, indicates the voter's name, and provides the address or separate interest identification for the voter's lot/unit. The voter then returns these combined envelopes by mail or hand delivery to a location specified by the inspector(s) of election. The voter may request a receipt for the delivery. Once the ballot has been delivered, it cannot later be changed by the voter, any other owner of the lot/unit, or any proxy holder.

Interestingly, a quorum is only required for these secret written ballot elections if so stated in the association's governing documents. If a quorum is required by the governing documents, each ballot received by the inspector(s) of election counts as a member present at a meeting for purposes of establishing the quorum.

Further, the association must allow for cumulative voting in elections of directors, even though using the secret ballot procedure, if and only if cumulative voting is provided for in the governing documents.

Proxies. With all of these procedures for conducting votes and using secret written ballots, you may well ask if the use of proxies is still valid. The short answer is "yes, if permitted or required by the association's bylaws." Proxies may not be construed or used in lieu of a ballot. The proxies must meet the requirements of the Davis-Stirling Common Interest Development Act, other laws, and the association's governing documents. The association is not required to prepare or distribute proxies to the members.

The law also provides that any instruction given in a proxy issues for an election that directs the manner in which the proxy holder is to cast the vote is to be set forth on a separate page from the proxy itself so the extra page can be detached and given to the proxy holder to retain. The proxy holder is then on his/her honor to cast the member's vote by secret written ballot as the member directs on that separate page. The proxy may be revoked by the member prior to the receipt of the ballot by the inspector(s) of election. After the ballot has been cast by the proxy holder, the proxy may not be revoked as to that election.

In summary, if your association's governing documents permit the use of proxies, the association is required to honor the proxies submitted for members. The association does not concern itself with any voting instructions given to the proxy holder and such voting instructions should be placed on a separate page from the proxy and given back to the proxy holder, together with a ballot for the proxy holder to vote on behalf of the member giving the proxy.

Election Results and Challenges. All votes are required to be counted and tabulated by the inspector(s) of election, or his/her/their designees in public at a properly noticed open meeting of the board or members. Any candidate or other member of the association may witness the counting and tabulation of the votes, provided that they do not interfere with the counting and tabulation process. No person, including a member of the association or an employee of the management company, is allowed to open or otherwise review any ballot prior to the time and place at which the ballots are counted and tabulated. The inspector(s) of election and/or his/her/their nominees may verify the member's information and signature on the outer envelope prior to the meeting at which the ballots are counted and tabulated.

The tabulated results of the election must be promptly reported to the board and must be recorded in the minutes of the next meeting of the board. The results must also be made available to the association members for their review, if requested. The board of directors must then give "general notice" (see Civil Code section 4045) of the tabulated results of the election within fifteen days after the votes were counted and tabulated.

The inspector(s) of election is/are responsible for retaining custody of the ballots until the time allowed for legally challenging any part of the election process or results, at which time custody of the ballots must be transferred to the association. Per Civil Code section 5145, any association member may bring a legal action challenging the results of the election within one year after the "cause of action accrues." Any member who wishes to contest any part of the election process or the results of the election should consult with legal counsel to determine the last date upon which they may file their legal challenge. If the challenge is successful, the court may void the results of the election. The member who prevails in a civil action to enforce the member's rights is also entitled to an award of his/her reasonable attorneys' fees and court costs and the court may impose a civil penalty of up to five hundred dollars (\$500) for each violation, except that each identical violation will be subject to only one penalty if the violation affects each member of the association equally. A prevailing association is not entitled to recover any costs in such a legal action, unless the court finds that the action was frivolous, unreasonable, or without foundation.

The inspector(s) of election is/are also required to make the ballots available for inspection and review by an association member or the member's authorized representative if there is a recount or other challenge to the election process. Any recount must be conducted in a manner that preserves the confidentiality of the vote.

Campaign Funding. Association funds may not be used for campaign purposes in connection with any association board election. For any other association election, association funds may not be used for campaign purposes except to the extent necessary to comply with duties of the association imposed by law. For purposes of these restrictions, "campaign purpose" includes, but is not limited to, (1) expressly advocating the election or defeat of any candidate that is on the secret election ballot and (2) including the photograph or prominently featuring the name of any candidate on a communication from the association or its board, except for the ballot, ballot materials, or a communication that is legally required. "Campaign purpose" also does not include one for which candidates are being allowed access to association media, publications, etc. for purpose of equal access to all candidates.

Noncommercial Signs, Posters, Flags and Banners. Many association CC&Rs, particularly those drafted before 2004, contain a restriction prohibiting all signs and other displays on private lots/units except for one "for sale" or "for rent" sign. These restrictions have been

unenforceable since 2004, when Assembly Bill 1525 became law as Civil Code section 1353.6, which recently became Civil Code section 4710. Now, associations may not prohibit posting or display of noncommercial signs, posters, flags or banners on a member's lot or unit, except as required for the protection of public health or safety, or if the posting or display would violate a local, state, or federal law. A noncommercial sign, poster, flag, or banner may be made of paper, cardboard, cloth, plastic, or fabric, and may be posted or displayed from the yard, window, door, balcony, or outside wall of the lot or unit. The noncommercial sign, poster, flag, or banner may not be made of lights, roofing, siding, paving materials, flora, or balloons, or any other similar building, landscaping, or decorative component, or include the painting of architectural surfaces.

The freedom to display noncommercial signs, posters, flags, and banners is not limited to election season. However, these items may be more likely to appear as part of either the association's election or the general election. Associations must respect the freed speech and freedom of expression rights of their members, provided that the displays comply with Civil Code section 4710.

Conclusion. Community association elections are now governed by specific laws and procedures. Residents now have free speech and freedom of expression rights to post noncommercial signs, posters, flags or banners that override any more restrictive rules in the CC&Rs. By following the laws and procedures described above, your association will be conducting its elections in the proper manner.

WHEN THE TIME COMES TO REMOVE A DIRECTOR

**By James H. Smith, Esq.
Grokenberger & Smith, Attorneys at Law, Santa Barbara**

Among those that have the pleasure to work with Homeowner Associations, I believe there is agreement that generally Association Directors are honest, hard working, well intentioned and strive to perform their responsibilities in the best interests of their Associations and Members.

Unfortunately, there are occasions where a Board Member presents a challenge to the orderly and proper pursuit of the Association's business. This can arise in many forms; disruptive behavior at meetings, failure to follow proper procedures, disclosure of confidential information, favoritism, interference with vendors and/or managers in the performance of their duties, repeated failure to attend Board meetings, neglecting to stay informed regarding the Association's business etc. When faced with such a Board Member, there are 3 steps that should be followed:

1. **Meet and Confer:** Absent conduct for which a Director may be removed for cause under Corporations Code 7221 (a) or (b), which will be discussed below, the Board should first address the issues of concern with the Board Member in question. Certainly, when compared to the other alternatives, it is in everyone's best interest to amicably resolve differences on the Board.

2. Request for Resignation: If a meeting with the Board Member in question does not resolve the issues of concern, and those issues continue to compromise the orderly conduct of the Association's of business, a formal request for resignation should be made.

3. Involuntary Removal of a Director: If the Board Member in question refuses to resign then, depending upon the degree of dysfunction and remaining time left on such Board Member's term, an involuntary removal of the Director may be the preferred course of action. The rules for involuntarily removing a Director from office are set forth in Corporations Code sections 7220 through 7225. Unless "cause" for removal can be demonstrated within the narrow definition of Corporations Code section 7221, in which case a Director may be removed from office by action of the other Directors, Directors may be removed only by a Member recall election.

a) Removal of Director for Cause: Corporations Code section 7221 (a), provides that the Board may declare vacant the office of a Director who has been declared of unsound mind by final order of court, convicted of a felony, or, if at the time the Directors elected the Bylaws provided that a Director may be removed for missing a specified number of Board meetings. Additionally, Corporations Code section 7221 (b) provides that the Board may declare vacant the office of a Director that does not any longer meet the qualifications to serve as a Director as set forth in the Association's Articles or Bylaws as they existed at the time of the Director was elected. By way of example, Association Bylaws often provide that in order to sit on the Board, a Director must be an owner. Additionally, some Associations' Bylaws also provide that in order to continue to sit on the Board, a Director must stay current in their assessments.

b) Removal of Director by Member Recall Election: The most controversial and challenging procedure to force a Director off the Board is through a Member recall election. In most instances, where a Director is presenting a challenge to the orderly conduct of the Association's business, and there are not grounds to remove such a Director for "cause", the only remedy is through a recall election. The required votes necessary to remove a Director is dependent upon whether the Association's Articles of Incorporation or Bylaws authorize Members to cumulate their votes.

1) Where Members May Not Cumulate Their Votes: The required vote for removal of Directors, where cumulative voting is not allowed, is the affirmative vote of a majority of all Members if the Association has fewer than 50 Members, and the affirmative vote of a majority of a quorum of the Members if the Association has 50 or more Members (Corporations Code section 7222 (a)).

2) Where Members May Cumulate Their Votes: The law is considerably more complex where an Association's Articles of Incorporation or Bylaws authorizes Members to cumulate their votes when voting for Directors. To protect the cumulative voting rights, Corporations Code section 7222 (b) (1) provides that no Director may be removed from office, if the votes cast against removal would have been sufficient to elect the Director to office in an election using cumulative voting. That calculation of cumulative voting strength must be made in the context of a hypothetical election,

and for the purpose of calculation, it must be assumed that no more votes were cast in the election than in the recall effort and the entire Board (i.e. the entire number of Directors authorized in the Articles or Bylaws at the time of the targeted Directors most recent election, is standing for election).

Complicated and difficult to comprehend? You bet; especially for those of us that are mathematically challenged. On those occasions where I have represented an Association going through a recall election where the provisions of Section 7222 (b) govern, I rely upon the expertise of an accountant to participate as the Inspector of Elections to ensure compliance with the Corporations Code. Michael Gartzke, CPA, who I relied upon on the most recent occasion, has a very “simple formula” to compute the correct number of votes necessary when section 7222 (b) applies. The formula is:

X = number of votes needed to defeat the recall

V - number of votes actually cast - a quorum would have to be achieved

B - number of Board Members

$X = (v \text{ divided by } b + 1) + 1$

There you go. I am sure that removes any doubt or confusion you may have had regarding the formula to be applied when Corporations Code section 7222 (b) applies; which is precisely why I recommend an accountant be on hand for such a recall election.

4. Recall Election Procedure: Any vote of the Members to remove an incumbent Director must be conducted in accordance with the secret ballot voting procedures set forth in Civil Code section 5100 through 5130.

5. Status of Recalled Director: Corporations Code section 7220 (b) states that “unless the Articles or Bylaws otherwise provide, each Director... “Shall hold office until the expiration of the term for which elected and until a successor has been elected and qualified.” This language suggests that recalled Directors continue to function as directors until replacement Directors have been elected by the Members, unless the Articles or Bylaws specifically provided otherwise.

6. Filling A Vacancy Caused by Recall of a Director: Unless the Association’s Articles or Bylaws provide that the Board may fill vacancies occurring on the Board by reason of the removal of Directors, such vacancies may be filled only by the approval of the Members (Corporations Code section 7224 (a)).

Conclusion

Disagreement and lively debate among Board Members is not uncommon and in many situations leads to well reasoned decisions. However, there are those occasions where a Member of the Board creates such dissension that it becomes difficult to efficiently carry on and conduct the Association’s business. It is in those instances, a recall should be considered.

As indicated above, successfully recalling a Director can be a challenge. When the decision to do so is made, those who are leading the challenge must ensure they are doing so in full compliance with applicable law.

INSPECTOR OF ELECTION – A MAJOR RESPONSIBILITY

By: Michael J. Gartzke, CPA

Many times, appointing an inspector of election appears to be a formality. It can be perceived as a function of little or no substance. After all, what's so difficult about counting ballots? In many cases, the process runs smoothly. Many times, the association manager or an owner will be appointed to perform the function. Depending upon the number of ballots to be dealt with, the inspector will appoint two additional people to assist as noted in Mr. Dunlevy's article – there always has to be an odd number of inspectors (i.e 1 or 3).

As noted in Mr. Smith's article about the recall of a board member, I was appointed by the board to be the inspector of this election. The ballot was a "yes or no" question. Should one of the board members be recalled. Upon appointment, I needed to understand what my responsibilities were. These are listed in Mr. Dunlevy's article and they are numerous!

With the direct assistance of legal counsel, a ballot was prepared and mailed to the membership along with a letter of explanation by the management company. The double envelope system was used whereby a #10 legal size envelope included that had each owner's name and property address printed in the upper left hand corner along with a signature line. Any ballot sent in which that outer envelope was not signed was invalid and not included in the count. A blank #9 envelope was included for the ballot to be enclosed and then mailed directly to me as the inspector of election. The return envelope to me included return postage already affixed. I received a list from the management company of all the owners and the property addresses to verify the validity of the ballots received and to determine whether or not a quorum was achieved.

Ballots were mailed to the owners approximately 30 days before the election. Under the current law, ballots were opened at an open meeting called for this purpose. Unlike the county elections absentee ballot process, I could not open and tabulate ballots I received ahead of time. Ballots could be submitted up to 15 minutes after the start of the meeting. When the polls closed, I appointed two members of the association who were in attendance who were not board members or related to board members to assist me in the opening of the ballots and the tabulation of the vote.

We initially determined that we had enough valid ballots to constitute a quorum so that we could move ahead. With the "yes or no" question, we tabulated the ballots two ways. After the ballots had been opened by the three of us, one of us read the vote and the other two tabulated independently. At the conclusion we compared our counts and we differed by one. The count can be viewed by members and at some point we had been interrupted which may have caused the difference. We then separated the ballots into "yes" and "no" piles. These were then counted and compared to our counts for re-verification. Upon agreement, each of us signed the tabulation for submission to the Association.

During this process, I sought counsel from the Association's attorney as well as other professionals who have conducted elections and have been elections inspectors in an attempt to avoid making any mistake that would invalidate the election. That guidance was very important.

While this was a "yes" or "no" question, the vote required an amount greater than a majority (a "supermajority") for the recall to be successful. The reasons for that are outlined in Mr. Smith's article and have to do with the number of directors elected at the meeting that the board member subject to recall was elected and the fact that cumulative voting was permitted by the Association's governing documents. In theory, a director could be elected if a minority number of owners cumulated all their votes for that director. This required an application of the formula shown in Mr. Smith's article that has been developed by attorneys interpreting Section 7222 of the Corporations Code. In this case, the supermajority was 75% + 1 vote.

Upon completion of the tabulation, I presented the explanation to those in attendance at the meeting and why there was the supermajority requirement. Based upon the number of ballots received, I told them how many ballots would have to vote no for the recall to fail. I then reported the vote and submitted our tabulation to the board.

I am required to store the outer envelopes, inner envelopes and ballots for one year in the event of any challenge to the result.

2015 CONDOMINIUM BLUEBOOKS

We have just received copies of the 2015 Condominium Bluebooks. This handy reference has been distributed by us for over 20 years as part of your membership. For those who have renewed for 2015, you will receive it before the end of the year. Books are \$20 each postpaid and orders can be sent to our PO Box address shown above.



Spring law seminar with Beth Grimm – Saturday, March 28 at 10 AM at Encina Royale, 250 Moreton Bay Lane, Goleta. Topics and other details to be determined.

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