

Lake Hollyhill Owners Association Record Retention Policy

Purpose

This Record Retention Policy (the "Policy") establishes the minimum requirements for the retention, maintenance, and disposal of records for Lake Hollyhill Owners Association (the "Association"). This Policy is adopted in accordance with Texas Property Code § 209.005(m), which mandates minimum retention periods for key records.

The purpose of this Policy is to ensure compliance with applicable laws, facilitate efficient management of Association records, protect the Association's interests, and provide members with access to necessary information while safeguarding sensitive data.

Retention Schedule

The Association shall retain records for the following minimum periods as required by Texas Property Code § 209.005(m). Additional records may be retained as deemed necessary by the Board of Directors.

Record Type	Description	Retention Period
Certificates of Formation; Bylaws; Official Policies	Original certificates filed with the state or county, including any amendments.	Permanent
Financial Records, Tax Returns, Audits	Ledgers, bank statements, receipts, invoices, tax returns	7 years
Account Records of Current Owners	Individual member account statements, payment histories..	5 years (from date of account closure for former owners)
Contracts (Term of 1 Year or More)	Agreements with vendors, service providers, or other parties with terms of one year or longer.	4 years after expiration or termination of the contract
Ballots and Election Records; Meeting Minutes	Nomination forms, ballots, envelopes, tally sheets; Minutes of all meetings.	7 years

Access and Inspection

Records shall be maintained in a manner that allows for reasonable access and inspection by owners or their authorized representatives in accordance with Texas Property Code § 209.005(c)-(h). Requests for inspection or copies must be submitted in writing via certified mail, and the Association shall respond within the timelines specified by law.

The Association will charge the requesting owner reasonable costs for the compilation, production, and reproduction of records, including copying fees in accordance with Texas Property Code § 209.005(i). Such costs may include materials, labor, and overhead but shall not exceed the amounts applicable under 1 T.A.C. Section 70.3. The requesting owner shall pay estimated costs in advance and any adjustments between estimated and actual costs shall be handled via a final invoice within 30 business days of delivery.

Storage and Maintenance

Records shall be stored securely in a manner that protects against loss, damage, or unauthorized access, using appropriate physical or electronic formats.

Disposal of Records

At the end of the applicable retention period, records may be disposed of securely through shredding, deletion, or other methods that ensure confidentiality.

Permanent records shall not be disposed of under any circumstances.

A disposal log shall be maintained for records destroyed, including the date, description, and method of disposal.

Adoption and Amendment

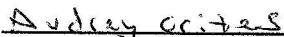
This Policy was adopted by unanimous vote of the Board of Directors on the 27th day of October, 2025. Amendments require Board approval and notice to Owners.



Brian O'Neill, President
Lake Hollyhill Owners Assoc.

State of Texas County of Montgomery

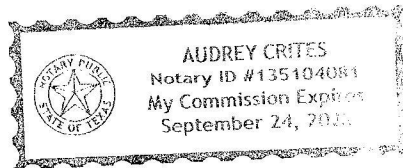
This instrument was acknowledged before me on 10-31-2025 by Brian O'Neill, President of LAKE HOLLYHILL OWNERS ASSOCIATION, a Texas non-profit corporation, on behalf of said corporation.



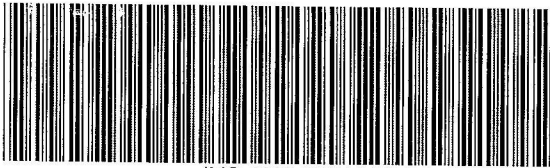
Notary Public, State of Texas

Printed Name: Audrey Crites

My Commission Expires: 09/24/2028



After recording return to: Lake Hollyhill Owners Association, PO Box 524, Plantersville TX 77363



VG-1695-2025-350761

Grimes County
Vanessa Burzynski
Grimes County Clerk

Instrument Number: 350761

Real Property Recordings

Recorded On: October 31, 2025 02:35 PM

Number of Pages: 3

" Examined and Charged as Follows: "

Total Recording: \$29.00

***** THIS PAGE IS PART OF THE INSTRUMENT *****

Any provision herein which restricts the Sale, Rental or use of the described REAL PROPERTY
because of color or race is invalid and unenforceable under federal law.

File Information:

Document Number: 350761
Receipt Number: 20251031000047
Recorded Date/Time: October 31, 2025 02:35 PM
User: Debbie H
Station: Clerk02

Record and Return To:

LAKE HOLLYHILL OWNERS ASSOCIATION
P.O BOX 524

PLANTERSVILLE TX 77363



STATE OF TEXAS
Grimes County

I hereby certify that this Instrument was filed in the File Number sequence on the date/time
printed hereon, and was duly recorded in the Official Records of Grimes County, Texas

Vanessa Burzynski
Grimes County Clerk
Grimes County, TX

Vanessa Burzynski