



DAVID FLOYD & ASSOCIATES, INC.

A Property Management Company

104 East Park Drive, Suite 320
Brentwood, TN 37027

Office: (615) 297-2824 Fax: (615) 297-9340 Email: dfloydassoc@gmail.com

Re: **New Owner Welcome Packet**

Dear Roderick Square Homeowner,

We are pleased that you have decided to invest in Roderick Square. It is a terrific place in which to own and live. David Floyd & Associates, Inc. serves as the managing agent for your Homeowners Association (HOA). We work closely with your Board of Directors to serve you under the provisions of the governing documents for your association.

Your monthly HOA fees will be at the rate of \$225 and you have three different options for payment:

Owners are welcome to pay their HOA Fees the old-fashioned way by mailing a check to our office at 104 East Park Drive, Suite 320 Brentwood, TN 37027. Please make sure all checks include the HOA name and individual address / unit number.

You may also pay by auto-draft from your checking or savings account. This saves owners the worry from having to remember to pay their fees, avoids late fees, and at the same time, helps with the HOA's cash flows. There is no charge to sign up on the payment-by-auto-draft program. In most instances, the draft actually takes place between the 6th and 10th of each month. If you change your bank account or sell your home, please remember to notify us in writing at least ten (10) days before the change occurs. If you are interested in setting up auto-draft, please complete the included Automatic Draft Authorization Form and return to our office with a *voided check*.

Roderick Square is also set up to allow owners to pay their monthly fee online by going to <https://www.hoabankservices.com>. Just choose your HOA, and then enter your account number (same as unit number / street address). Recurring payments can be set up as well through this platform. There is no charge for online payments unless you pay by credit card. The free payment method is known as payment by e-check.

Your Homeowner's Association also has an email address that all questions and requests should be directed to. This email address is RoderickSquareHOA@gmail.com.

We look forward to serving you and will be visiting your property regularly to inspect the common areas, review HOA-related issues, and ensure that the vendor services are being provided according to the contracts. Should you have any concerns, complaints, ideas, or suggestions, please email, fax, or send via U.S. Mail.

Our primary objective is to work with your Board to maximize the value of every dollar spent by the HOA and at the same time be able to adequately fund the reserve accounts to avoid the need for any future special assessments.

If you have not been provided a copy of the governing documents, please let us know and we can email them to you or provide a hard copy to you for your records.

This packet includes a Homeowner Information Form. Please take a few minutes to carefully review and complete the form as it is critical to our being able to keep you updated and informed as it pertains to your Homeowners Association.

Should you have any questions, please contact us at your convenience.

Again, we look forward to being of service to you.

Respectfully,

Leigh Ann Floyd

David Floyd & Associates, Inc.
Managing Agent for Roderick Square

NEW OWNER INFORMATION FORM

Dear New Homeowner,

In order to keep our records up-to-date and to maintain contact with homeowners/residents, we ask that you complete and return this form to David Floyd & Associates, Inc. via mail at 104 East Park Drive #320 Brentwood, TN 37027, via email to dfloydassoc@gmail.com, or via fax to 615-297-9340. Please note that this information may be published in your HOA's directory unless you request that it not be published.

Name(s) of New Owner(s): _____

Name of Homeowners Association: _____

Address at Subject Property: _____

Mailing Address (if different from above): _____

Email(s): _____

Phone(s): _____

If this is a rental unit, please provide the following information. Please complete renter information, and include rental agency information is applicable.

Tenant Name(s): _____

Is Tenant a Family Member? (yes or no): _____

Email(s): _____

Phone(s): _____

If applicable:

Rental Agent: _____

Rental Agent Mailing Address: _____

Rental Agent Email: _____

Rental Agent Phone: _____

AUTHORIZATION AGREEMENT FOR AUTOMATIC DRAFT

I hereby authorize David Floyd & Associates, Inc. on behalf of my HOA, hereinafter called ORGANIZATION, to initiate debit or credit entries to my Checking Account/Savings Account (circle one) indicated below at the depository financial institution named below, hereinafter called DEPOSITORY, and to debit/credit the same to such account. I acknowledge that the origination of ACH transactions to my account must comply with the provisions of U.S. law.

Financial Institution Name: _____

Routing Number: _____ Account Number: _____

This authorization is to remain in full force and effect until ORGANIZATION has received **written notification** from me of its termination in such time and in such manner as to afford ORGANIZATION and DEPOSITORY a reasonable opportunity to act on it.

Name: _____

Signature: _____ Date: _____

*****Please provide a voided check with this authorization form*****

Homeowners Association Name: _____

Address at Property to be Credited: _____

Owner Name: _____

Phone Number: _____

Email Address: _____

Please mail this completed form along with a voided check to:

David Floyd & Associates, Inc.
104 East Park Drive, Suite 320
Brentwood, TN 37027.

NOTE: Completed form must be received prior to the 25th of the current month in order for it to begin drafting the following month.