



HEPOA Owner Info as of January 2024	Address	Town	St	5 digit Zip
Bowers, RJ	165 Heritage River Rd	West Jefferson	NC	28694
Stroup Family Retreat, LLC (Alice Butler)	704 West Roseboro St	Roseboro	NC	28382
Cass, Gay	925 New Garden Road, Apt. 316	Greensboro	NC	27410
Coggins, Timothy & Lisa	2847 Pickard Road	Sanford	NC	27330
Copeland, Jimmy & Jacki	458 Autumn Run	West Jefferson	NC	28694
Edwards, Sherrie G	PO Box 1002	Jefferson	NC	28640
Esarey, Duane & Johnson, Janet	165 River Sound	West Jefferson	NC	28694
Grayson, Susan Wall & Sheldon, John	4335 Waumsetta Rd	Richmond	VA	23235
Hamby, Judy	3362 NC Hwy 16W	Millers Creek	NC	28651
Helms, Shelia	167 Timbersong	West Jefferson	NC	28694
Ince, Onur and Tanya	137 Timbersong	West Jefferson	NC	28694
Jordan, Ginger	127 Deerfield Rd.	West Jefferson	NC	28694
Jordan, Chris	157 Deerfield Rd.	West Jefferson	NC	28694
King, David & Tyra	PO Box 506	Efland	NC	27243
Landen, Robert & Janice	247 Autumn Run	West Jefferson	NC	28694
Marrero, Raul & Evelyn	3160 Gem Ives Ct NE	Buford	GA	30519
McCurdy, Mitzie	260 West Aveuue	Troutman	NC	28166
McIver, Jerry	197 Northmont Road	Taylorsville	NC	28681
McNeely, Brad and Emily	4899 Old Hickory Rd.	Lancaster	SC	29720
Meyer, Amparo/Rice, Curtis	4605 SW 152nd Ave	Miramar	FL	33027
Millner, Pryor and Lauren	10015 Bayart Way	Huntersville	NC	28078
Moore, Dean & Jean	118 Heritage River Road	West Jefferson	NC	28694
Murray, Thomas & Pamela	10111SW 16th Place	Davie	FL	33324
Nowak, Joseph and Michele	1400 Freshwater Ct.	Wake Forest	NC	27587
Shepherd, Claude & Kay	1295 Airport Rd.	N Wilkesboro	NC	28659
Shepherd, Michael & Paula	3212 Woodstream Lane	Ellicot City	MD	21042
Sipple, Mike & Karen Bobbitt	709 Nikanor Rd	West Jefferson	NC	28694
Swan, Ryan Patrick & Michelle Rene	5035 Neiman Cove	Raleigh	NC	27612
Tanseer, Tracy Lauren and Fortune, Grace Elizabeth	423 Autumn Run	West Jefferson	NC	28694
White, Rick & Ann	9221 Fawn Lake Drive	Raleigh	NC	27617
Yow, Richard & Kathleen	591 Cedar St.	Longboat Key	FL	34228



Our Community Matters

Truth

Truth

TOP MYTHS ABOUT HEPOA

MYTH BUSTERS

Myth The purpose of our HOA is to maintain neighborhood aesthetics to boost property values.

Truth

The primary responsibilities of the HEPOA include maintaining the roads, mowing common areas, keeping street lights operational, and ensuring adequate insurance coverage is in place.

Myth Due to our small size, state statutes and IRS regulations for HOAs do not govern our HOA.

Truth
Our HOA must adhere to state statutes and IRS regulations. We must also comply with the Corporate Transparency Act (CTA) and Beneficial Ownership Information (BOI) reporting.

Myth The annual assessment amount is fixed in the Restrictive Covenants.

The annual assessment is to be determined by the annual depreciation costs of our properties combined with budgeted operating expenses. The developer's road fund assessment and the developer's right to adjust lot lines were discontinued upon transitioning to HEPOA Board governance.

Myth Individual members wouldn't be affected financially by lawsuits or insurance claims exceeding our coverage.

Truth

HEPOA is structured as a corporation, and all homeowners are members of this corporation. As members, we collectively share the liability for any lawsuits or claims that arise from inadequate insurance coverage.

Myth If funds are low, we can use a special assessment to resurface the roads.

HEPOA is legally obligated to ensure adequate funding for road maintenance, which must be reflected in the annual assessments based on calculated depreciation costs. Our Covenants do not permit special assessments, which are typically reserved for new, non-essential purchases rather than required

maintenance tasks like road upkeep.

Please join us for an open Zoom meeting prior to our annual gathering. This will be a great opportunity to clarify any questions regarding the topics discussed here. Details will be shared when this is scheduled. More information at:

https://heritageestatesnc.com/details-and-checklists/
password: river123!



28 June 2024

Dear Heritage Estates POA members,

With an eye towards promoting a fuller understanding of the common areas and their legal standing, the Board of Directors wished to give annual notice regarding decorative fencing on the Heritage Estates right of way (ROW). Understanding that there are many acceptable uses and encouraged improvements on the ROW (for instance driveway pillars, lamp posts, address signs, as well as decorative fences and other landscaping features), it is still important to point out that decorative fences might become problematic if misconstrued or applied to for precedent. Accordingly, the Board is providing this notification to the membership.

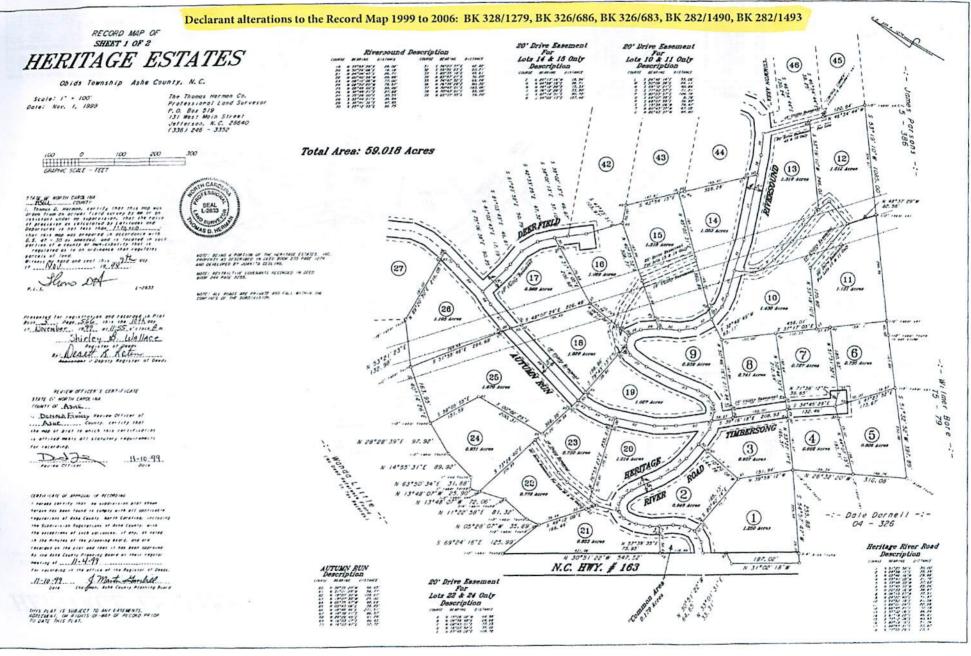
Many forms of improvements to ROW are allowed by our governing documents, including decorative fencing, but these should not serve to enclose or cut off significant portions of the ROW, or obstruct functions implied by the ROW boundaries. More importantly, they cannot serve to abrogate the <u>permanent legal standing of the ROW boundaries</u> and the usages of that ROW as detailed in our governing documents and employed in our routine practices (for instance, per structure construction set-backs and as areas serving the Association's common interests). Specifically, decorative fencing does not imply adverse possession, provide color of title, abrogate easement, or change the legal standing of the ROW inherent in the subdivision's original design, as shown by the 1999 Record Map (attached).

Most respectfully,

Duane Esarev

2024 HEPOA President

Attachments: Heritage Estates Record Map



HEPOA-ARC checklist, incorporating Declaration and 2023 Bylaws citations Approved by Board motion dated 11 February 2024

Heritage Estates Property Owners Association Architectural Checklist - implementing terms of the Declaration and Bylaws

Sections:

- 1. Initial residence/outbuildings construction checklist and agreement.
- 2. Subsequent outbuilding on same lot as residence checklist and guidelines.
- 3. Subsequent outbuilding on an adjacent lot checklist and guidelines.
- 4. Repairs, remodelings, additions, subsequent decks, driveways, other improvements.
- 5. Rules guiding use of lots without an approved permanent residence.
- 6. Text of cited governing documents.

Estimated Construction Start Date	Anticipated Completion Date			
Owner Signature	Date			
HEPOA Signature (Officer or ARC Committee)	Date			
Appropriate part of form below is being filled out at; Prior to construction At beginning of construction During construction At end of or subsequent to construction				
 All buildings set-back 20' from fronting ROW, e All buildings set-back 10' from property line of Minimum 1000 heated square footage of each All co-constructed outbuildings in accordance v Driveways for lots should be checked for place All platted driveway easements on the record v Following home construction each lot must use Motor homes as a residence only during period Twelve (12) month deadline for completion of 	in advance by ARC (RC&R 2021:9). &R 1999:5; 2021:5). defined (RC&R 1999:7 & 10; 2021:7 & 10) onstructed off frame, with roof pitch 6/12 or greater. except lots 17, 38, 39, 52 and 53 (RC&R 2021:8). adjoining unconsolidated property (RC&R 2021:8). home (RC&R 2021:9). with guidelines at RC&R 2021:9. ement, drainage, and any existing easements. map must be observed and respected. e off-street parking (RC&R 2021:10b&13). d of construction only (RC&R 2021:13). dwelling/detached garage (RC&R 2021:14). B Bylaws Article IV, Section 1:d:16. Request in advance! in unconsolidated lot (RC&R 2021:16).			

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2. For adding a subsequent permanent outbuilding on the same lot as main residence.

On lots having a completed residence, or an ARC approved and in-progress construction of such a residence, the Lot owner may also construct free-standing permanent outbuildings as long as: Lot placement and construction plans of permanent outbuildings approved in advance. All out buildings follow Ashe County and the North Carolina Building Codes. Outbuildings shall be constructed in the same style and with the similar materials as the main house
 Note: there is no minimum size for a permanent outbuilding per the Declaration or Bylaws. Outbuildings to accompany a log residence may have log-siding, but any complimentary siding OK. 20' building set-back from fronting ROW, except lots 17, 38, 39, 52 and 53 (RC&R 2021:8). 10' building set-back from property line of any adjoining unconsolidated property (RC&R 2021:8). 5' utility easement of 5' exists on all sides of each unconsolidated lot (RC&R 2021:16). New driveways entering lots checked for placement, drainage, and any existing easements. All platted driveway easements on the record map must be observed and respected. No visible cinder or concrete blocks (RC&R 1999:5; 2021:5). Owner/Contractor is responsible for any street damage due to construction activity.
 Record made of construction start date. Twelve (12) month deadline for completion of outbuilding (RC&R 2021:14). Construction extensions to be requested before deadline (2023 Bylaws Article IV, Section 1:d:16).
3. For adding a subsequent permanent outbuilding on a lot adjacent to the main residence.On lots having a completed residence, or ARC approved and in-process construction of such a
residence, the owner may construct detached permanent outbuilding(s) on an adjoining lot to the lot having such a residence, <u>as long as</u> <u>said adjoining lot is permanently secured to the lot containing the approved residence</u> . An acceptable form of securing the lots' future conjoined sales may be accomplished by consolidation with the Ashe County Register of Deeds. <u>Please note that consolidation of the adjoining lot with the lot containing a home does not extinguish the enduring covenanted per lot assessment obligations and the voting rights</u> that pertain to each Heritage Estates lot (excepting those two lots consolidated by the Developer during the period of that entity's rights). See NCGS 47F-103, items 2, 6, 9, 11ii and 11iii; Heritage Estates RC&R 1999:10 and 2021:9, and Heritage Estates Bylaws 2023 Article IV, Sect. 2.
having such a residence, <u>as long as</u> said adjoining lot is permanently secured to the lot containing the approved residence. An acceptable form of securing the lots' future conjoined sales may be accomplished by consolidation with the Ashe County Register of Deeds. <u>Please note that consolidation of the adjoining lot with the lot containing a home does not extinguish the enduring covenanted per lot assessment obligations and the voting rights that pertain to each Heritage Estates lot (excepting those two lots consolidated by the Developer during the period of that entity's rights). See NCGS 47F-103, items 2, 6, 9, 11ii and 11iii; Heritage Estates RC&R 1999:10 and 2021:9, and Heritage Estates Bylaws</u>

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	Driveways onto lots should be checked for placement, drainage, and any existing easements.
	All platted driveway easements on the record map must be observed and respected.
	Record construction start date.
	Twelve (12) month deadline for completion of outbuilding (RC&R 2021:14).
	Construction extensions should be request before deadline (2023 Bylaws Article IV, Section 1:d:16).
4.	Subsequent repairs, remodeling, additions to a residence or outbuilding, subsequent decks, driveways, parking areas, placement of prefabricated storage buildings, and other improvements on the lot containing the residence or a lot consolidated with same.
	Except for the obligations to follow local and state building codes and being constructed in the same or complimentary styles/colors and with the similar materials as the main house, there is only the obligation to meet all easements, setbacks, driveway placement and proper drainage requirements as listed below. Otherwise, these types of improvements/additions/repairs are not regulated by HEPOA.
	20' set-back from fronting ROW, except lots 17, 38, 39, 52 and 53 (RC&R 2021:8).
	10' set-back from property line of any adjoining unconsolidated property (RC&R 2021:8).
	5' utility easement of 5' exists on all sides of each <u>unconsolidated</u> lot (RC&R 2021:16).
	New driveways entering lots checked for placement, drainage, and any existing easements.
	All platted driveway easements on the record map must be observed and respected.
5.	Lot use and temporary improvements on unconsolidated lots without a permanent residence.
	Members' lots owned and used <u>without</u> the benefit of being permanently secured via combination to a lot containing an owner's residence are limited to placement of temporary personal property and such easily removable affixed property improvements as indicated in Bylaws Article IV, Section 2 (see full text attached below). In addition to unaffixed and temporarily affixed items, any improvements to lots under this heading must also meet the following guidelines.
	20' building set-back from fronting ROW, except lots 17, 38, 39, 52 and 53 (RC&R 2021:8).
	10' building set-back from property line of any adjoining <u>unconsolidated</u> property (RC&R 2021:8).
	5' utility easement of 5' exists on all sides of each <u>unconsolidated</u> lot (RC&R 2021:16).
	New driveways entering lots checked for placement, drainage, and any existing easements.
	All platted driveway easements on the record map must be observed and respected.
6.	Text cited from selected Declaration/Covenants and current (2023) Bylaws
	&R 1999:5 and 2021:5 "No building of any kind shall be erected or allowed to remain on said property if there are any

cinder blocks or concrete blocks exposed on any side."

RC&R 1999:7 and 2021:7 "No single-wide, double-wide or other mobile homes or house trailers shall be permitted on the subject premises; provided, however, that nothing herein shall prevent modular homes which have been constructed off frame, with roof pitches 6/12 or greater if approved pursuant to paragraph 10 below. No other modular homes shall be permitted."

RC&R 1999:8 and 2021:8 "No building shall be erected upon the granted premises which is closer than twenty (20) feet from the right of way or closer than ten (10) feet from the property line of any other adjoining tract; provided, however,

