# *Welcome to Heritage Grand!*

*A Grand Lifestyle for*
*Active Adults*

Prospective Resident,

We are pleased that you are considering joining us in our 650-home community consisting of 552 detached stand-alone homes and 98 duplex townhomes. Hopefully this summary of information will be found useful in your decision-making process.

Our subdivision was built between 2002 and 2010 with home sizes varying from 1,423 square feet to 2,996 square feet of living area. Common areas and facilities support all homes.

We are an age 55-and-overactive adult community where we strive to obtain 100% of residences in Heritage Grand be occupied by an owner(s) who is 55 years of age or older.

Our governing documents planned for a homeowner's association (HOA) form of management as the vehicle for collectively protecting the value and desirability of the real property here, and we operate a homeowner elected five-member Board of Directors.

A monthly HOA assessment fee is required. Please refer to the attached table for the assessment fee amount and a summary of amenities provided by the fee.



*Aerial view of Heritage Circle enclosing common property of Heritage Grand*

Our community's main entry off Cinco Ranch Blvd. (gates closed at nights) leads into a common property area encircled within Heritage Circle. Within this area is found our 14,000 square foot clubhouse, heated pool/resistance pool/spa, pickle ball/half-court basketball, mini golf, etc.

The Clubhouse Ballroom provides a beautiful setting for social activities that take place on a daily or weekly basis as well as the location for HOA meetings. Please see the attached listing of routinely held events (regularly emailed to homeowners).

See also the attached map of the full community.



*The fitness center at the clubhouse is available 24/7.*



*Heated swimming pool*



*ballroom and stage*



*mini-golf*

Our management company, FirstService Residential is a source of additional Heritage Grand information. FSR may be reached at the clubhouse number listed above.

***Thank you for considering Heritage Grand as your next home.***

Please note: This description of Heritage Grand subdivision is prepared for the general information of anyone who may be interested in Heritage Grand as a current or future place of residence.

While this description is believed to be accurate, nothing in this description is intended to amend, supplement or diminish the provisions of the various governing documents under which the subdivision was created and is maintained.
We comply with the Texas Legislature-written "Texas Property Code" (found at the website www.texasstatutes.com/property-code with specific focus on Title 11 – Restrictive Covenants and specifically Chapters 201, 202, 204, 207, and 209).
Our internal governing documents may be found on the website www.heritagegrand.org with the most senior of these documents being the "Declaration of Covenants, Conditions, and Restrictions."
The "Architectural Rules and Regulations" document defines the community-wide architectural standards we maintain.

25125 N Heritage Grand, Katy TX 77494
Clubhouse phone: (281) 391-2582 Fax: (281) 371-2550
Email to: receptionist@heritagegrand.comcastbiz.net

## Amenities Furnished Through Heritage Grand Dues

| | *Stand-Alone Housing* | *Duplexes (Americanas)* |
|---|---|---|
| ***Housing Type:*** | | |
| ***2026 Monthly Dues Amount:*** | **$358** | **$508** |
| **Services Provided for EACH Heritage Grand Home:** | | |
| House Exterior repainted, including painted doors (every 9 years per HOA schedule) | Yes | |
| Stained Front Door refinished (minimum 3 years, on request) | | |
| Front Yard mowed, fertilized, mulched, insect-treated on a regular schedule | | |
| Prune Shrubs (front yard beds only) per a regular schedule | | |
| Sprinkler System for routine repairs and limited adjustments for front and back yards (five zones maximum); backflow preventer valve (unless failure due to inadequate freeze protection)<br>Exception: controller device not maintained or supported by the HOA<br>Note: System additions or modifications are not covered and must be approved by the HOA | | |
| **Additional DUPLEX-SPECIFIC Considerations:** | | |
| Property Insurance (building shell) | No | Yes |
| Maintenance and Repair specific to property insurance-covered items | | |
| Roof Shingles and Decking Replacement as required (last replaced in 2020) | | |
| Roof Leaks (specifically due to roof shingle failures, not penetrations) | | |
| Gutter and Downspouts repair and replacement (cleaning is not included) | | |
| James Hardie (cement board) exterior siding repair and individual siding board replacement (not windows, doors, or window or door frames, or full siding) | | |
| Homeowner-requested roof penetration leaks (three years after installation) | Not Applicable | See R&Rs |
| **Heritage Grand Community-Wide Amenities (nonspecific to homes):** | | |
| Clubhouse Use including Exercise Room and Recreational Spaces | Yes | |
| Recreational Facilities including Swimming Pool & Spa, Miniature Golf, Bocce Ball, Pickleball, Basketball (half court), Shuffleboard | | |
| Routine Clubhouse Activities and Events<br>Bingo, Trivia, Movie nights, Drama Presentations, Dances, Bridge, Canasta, Poker, Chess, Crafts, Line Dancing, Pingpong, Pool Tables, Ladies Lunch Group, Couples Dinner Group, etc. | | |
| Common Area Trees, Tree Pruning, and Tree Canopy Management | | |
| Common Area Fences and Perimeter Fences furnished and maintained | | |
| Common Areas mowed, watered, fertilized on a regular schedule | | |
| Common Area Shrubs & Trees maintained (trimmed, pruned, removed as needed) | | |
| Seasonal Color Plantings (in various common areas) | | |

| Housing Type: | Stand-Alone Housing | Duplexes (Americanas) |
|---|---|---|
| **Heritage Grand Community-Wide Amenities** *(cont'd)*: | | |
| Streets, Curbs, and Community Sidewalks maintenance | Yes | |
| Water Features -- Two Ponds & Two Fountains | | |
| Subdivision Gates maintained (primary gate closed at night only) | | |
| Weekly neighborhood Mosquito Spraying (during a defined season) | | |
| Cinco Ranch Recreation<br>The Cinco amenities include the use of six pools, the Cinco Beach Club, the boat docks, fishing lakes, sand volleyball courts, tennis courts, soccer nets, baseball backstops, covered pavillions, BBQ grills and hiking/biking trails. | | |
| Home Cable TV & Internet<br>A 2023 through 2029 contract between Comcast and Heritage Grand delivers the following "X-1 System" services for each of our 650 homes:<br>(a) a DVR plus two companion boxes (all with voice-activated remotes) allowing for three TV connections;<br>(b) "Digital Preferred" TV Channel package;<br>(c) Comcast modem/router for home computer and wi-fi service, supplying 150Mbps download speed.<br>Note: The home's inside-the-wall wiring is owned and maintained by the property owner.<br>If desired, residents procure additional services from Comcast and pay for those services through direct billing. | | |
| Home Security Monitoring<br>In-house security wiring is owned and maintained by the property owner. The HOA pays for the monitoring fees of homes utilizing Modern Systems (the company Heritage Grand has a contract with).<br>It is the sole responsibility of each resident to confirm that their specific system is correctly being monitored.<br>With many homes no longer utilizing the hard-wired "land line" anticipated when the contract was negotiated, extra fees may be required to connect via a cell service or internet-delivered phone service. | | |
| **Funding Plan for Future Large Infrastructure Needs:** | | |
| **As of 10/1/2025 the Reserve Fund totals approximately $3.5 million.**<br>Funding Goal: The Funding Goal of "reserves" is to have adequate but not excessive monies available when significant expenditures could be logically anticipated during the study's 30-year target period.<br>We contract with Reserve Advisors, Inc, Milwaukee WI (RA) to define necessary funding for this future infrastructure spending. Our current study is dated 7/17/24, revised 1/30/25. Reserve fund spending authorizations per Board action only. | Yes | |

| Housing Type: | Stand-Alone Housing | Duplexes (Americanas) |
|---|---|---|

| **Funding Plan for Future Large Infrastructure Needs** *(cont'd)*: | |
|---|---|
| A Cash Flow Method is used by RA to compute the plan. Their method offsets future variable expenditures with existing and future stable levels of reserve funding. Heritage Grand's application considers:<br>• current and future local costs of replacement<br>• 2.7% annual rate of return on invested reserves<br>• 3.2% future Inflation Rate for estimating Future Replacement Costs<br>Sources for *Local* Costs of Replacement: RA's proprietary database, historical costs and published sources, i.e., R.S. Means, Incorporated.<br>Certification: This *Full Reserve Study* exceeds the Community Associations Institute (CAI) and the Association of Professional Reserve Analysts (APRA) standards fulfilling the requirements of a "Level I Full Reserve Study."<br>Current practice is to update the study every 5 years (2030 is next revision year). | Yes |
| **Services <u>NOT</u> Provided for ANY Heritage Grand Homes:** | |
| Grass, Front Yard (replacement need caused by overwatering or underwatering; or failure due to excessive shade caused by tree canopy management failure) | NOT paid through Dues |
| Dead Plants Replacement (front or back yards) | |
| Tree Pruning and Canopy Management in Residential Yards (Exception: A six-foot clearance is HOA-maintained under front yard trees for yard crew access) | |
| Patios, Decks, Pergolas, Pools, Sheds, etc. (regardless of whether installed by current or previous homeowner) | |
| Heating, Ventilation, & Air Conditioning Systems (HVAC) including drains, pans; Auxiliary Generators | |
| Exterior Lighting (fixtures, bulbs, etc.) | |
| Garage Doors and Garage Door Openers | |
| Pest Control (vermin, termites, ants, etc.) inside or outside (except mosquitos) | |
| HOA-owned property if damaged by homeowner non-compliance with R&Rs | |
| Items considered a "house construction defect" (there is no HOA warranty) | |
| James Hardie (cement board) exterior siding repair and replacement if damage is due to homeowner negligence | |
| Roof Leaks at roof penetrations | |
| Driveways, sidewalks on residential property | |

Note 1. For specifics of these amenities, see Heritage Grand's governing documents.

Note 2. Back yard maintenance is the responsibility of the homeowner. This can be homeowner-contracted with the front yard crew for an additional fee.

Arlen Isham

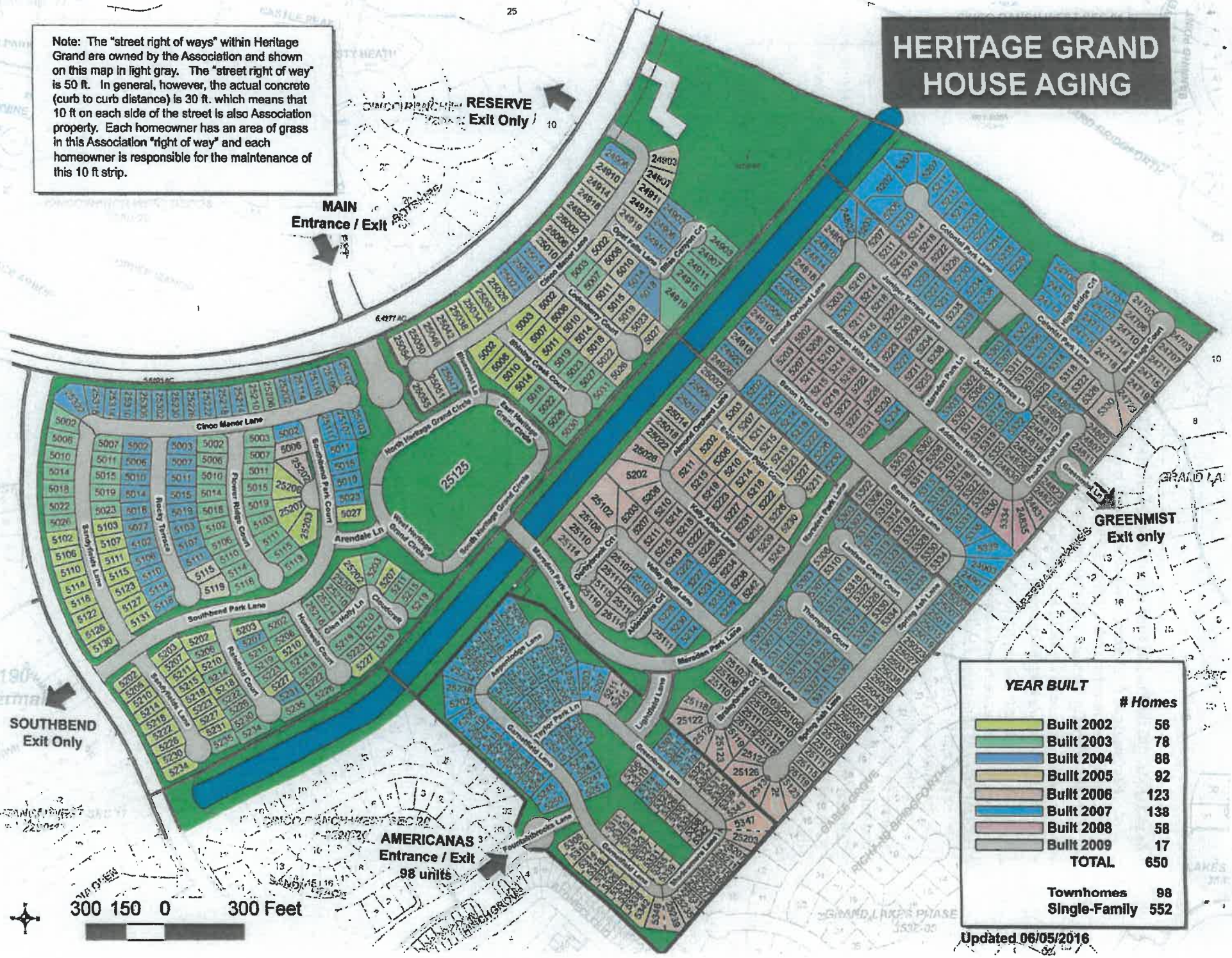
| | | |
|---|---|---|
| **As of 12/31/2020 the Reserve Fund will total approximately $2.6 million.**<br>Funding Goal: The Funding Goal of "reserves" is to have adequate but not excessive monies available when significant expenditures could be logically anticipated in the study's 30-year target period.<br>We contract with Reserve Advisors, Inc, Milwaukee WI (RA) to define necessary funding for this future infrastructure spending. Our current study is dated 7/27/20.<br>A Cash Flow Method is used by RA to compute the plan. Their method offsets future variable expenditures with existing and future stable levels of reserve funding.<br>Heritage Grand's application considers:<br>• current and future local costs of replacement<br>• 2% annual rate of return on invested reserves<br>• 2% future Inflation Rate for estimating Future Replacement Costs<br>Sources for *Local* Costs of Replacement: RA's proprietary database, historical costs, and published sources, i.e., R.S. Means, Incorporated.<br>Certification: This *Full Reserve Study* exceeds the Community Associations Institute (CAI) and the Association of Professional Reserve Analysts (APRA) standards fulfilling the requirements of a "Level I Full Reserve Study."<br>Current practice is to update the study every 5 years (2025 is next revision year). | Yes | Yes |

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# HERITAGE GRAND HOUSE AGING

Note: The "street right of ways" within Heritage Grand are owned by the Association and shown on this map in light gray. The "street right of way" is 50 ft. In general, however, the actual concrete (curb to curb distance) is 30 ft. which means that 10 ft on each side of the street is also Association property. Each homeowner has an area of grass in this Association "right of way" and each homeowner is responsible for the maintenance of this 10 ft strip.




| YEAR BUILT | # Homes |
|---|---|
| Built 2002 | 56 |
| Built 2003 | 78 |
| Built 2004 | 88 |
| Built 2005 | 92 |
| Built 2006 | 123 |
| Built 2007 | 138 |
| Built 2008 | 58 |
| Built 2009 | 17 |
| TOTAL | 650 |
| Townhomes | 98 |
| Single-Family | 552 |

Updated 06/05/2016