



South Oak Grove Estates COMMUNITY ASSOCIATION, INC.

ANNUAL MEETING

December 9, 2025
6:00 PM



MEETING RULES



MICROPHONES

When not addressing the community, please leave microphones muted.

DISCUSSION

Please hold questions and comments until the designated open forum after adjournment.

Please limit questions and comments to 2 minutes or less.

Anyone speaking outside of the discussion forum will be automatically muted.



AGENDA

1. Introductions

- a. Legacy Southwest Management Staff
- b. South Oak Grove Board
- c. Lennar

2. Community Update

- a. Development Update / Planned Improvements

3. Budget Update

- a. 2025 Budget YTD Actual
- b. 2026 Budget

4. Adjournment

5. Questions & Answers

INTRODUCTIONS



Legacy Southwest Property Management

- Danielle Lascalere, CMCA, AMS- President
- Demarcus Harris, CMCA, AMS- Vice President
- Ryan Smith– Developer Liaison Manager
- Michael Mitchell - Community Manager
- Steve Duckworth Compliance Coordinator

South Oak Grove Board of Directors

- Max Miller (Declarant Rep)- President
- Annie Hepner (Declarant Rep)- Vice President
- John Olvera (Declarant Rep) Secretary & Treasurer

Lennar DFW Team

- Greg Urech - President of Land- DFW
- Lynn Sciandra- Land Coordinator

INTRODUCTIONS



What do my assessments pay for?



To make a payment, go to
<https://lswpm.cincwebaxis.com> or
scan here

The HOA is required to pay for all operating expenses of the community while contributing monies to the Reserve account.

Your assessments are applied to the listed items:

- General maintenance of all common areas, i.e., landscape services which include mowing, edging, tree trimming, chemical treatments, etc.
- Replacement of trees and shrubs.
- Electricity to operate the irrigation systems throughout the community.
- Utility Services
- Repairs and general maintenance of the irrigation systems, i.e., replacing broken sprinkler heads, valves, etc.
- Miscellaneous common area repairs, i.e., minor landscape material replacements, etc.
- Repair of major assets.
- Insurance premiums, corporate and federal tax obligations.
- Correspondence letters to homeowners, processing ACC requests, postage, etc.

Please keep in mind that this represents only a fraction of the services that homeowner assessments provide for your community. Legacy Southwest Property Management Company was selected by the Board of Directors to provide professional management services.

These services include maintaining the Association's books and records, collecting, implementing your Declaration of Covent Association assessments, implementing your Declarations of Covenants, Conditions and Restrictions, performing regular property inspections and maintaining the common areas within the Association's budget and Board instruction.

The Board of Directors has many responsibilities, including frequent review of the Association's budget to decide if current homeowner assessments are appropriate to fund the community's upcoming annual expenditures vendor selection, such as landscape & holiday lighting, landscape maintenance, water and electrical increases for the common area lighting and irrigation, etc.

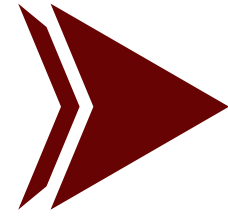
A consumer protection law was passed which entitles homeowners to be informed that they are buying a home in an association and what it requires. The title company is obligated to provide all community information at closing.

LENNAR UPDATE





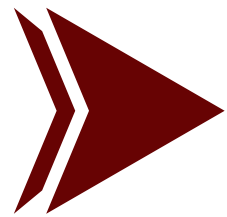
COMMUNITY UPDATE



Community Transition – timeline to be determined



75% to buildout Association will source 1 Homeowner to be apart of Board of Directors.



Currently there are 215 homes currently.

438 Homes at Buildout



EaglesCrossing SubDivision will have 110 Condos being built

BUDGET UPDATE





2025 BUDGET VS YTD ACTUAL AS OF 10.2025

Category	2025 YTD Actual	Annual Budget
Operating Income	\$88,526.81	\$96,712.33
General & Administrative	\$19,476.66	\$22,556.00
Insurance & Taxes	\$3,857.46	\$4,553.20
Landscaping	\$25,608.42	\$20,000.00
Maintenance & Repairs	\$0.00	\$1,000.00
Utilities	\$7,555.07	\$17,400.00
TOTAL OPERATING EXPENSE	\$56,497.61	\$65,509.20

2026 BUDGET

2026 South Oak Grove Projected Total Income (w/out Developer funding) = \$199,288.00

2026 South Oak Grove Projected Total Expenses = 199,288.00

2026 Projected Declarant Shortfall Funding = \$0

2026 South Oak Grove Annual Assessment = \$500.00

Category	2026 Budget
Assessment Income (Total)	\$199,288.00
General & Administrative	\$31,361.00
Insurance & Taxes	\$7,360.00
Landscaping	\$53,708.00
Maintenance & Repairs	\$5,000.00
Utilities	\$13,000.00
Reserve Contribution	\$88,859.00
TOTAL BUDGET	\$199,288.00

BANK ACCOUNT BALANCES

Operating Account

\$73,645.97

Reserve Account

\$32,062.95

Current Bank Account Balance

South Oak Grove Estates

REMINDERS

- Community Website: www.Southoakgroveestateshoa.com
- Homeowner Portal: lswpm.cincwebaxis.com
- Management Contact Information:
 - Michael Mitchell - Community Manager
 - 214-705-1615 ext 130
 - michael@legacyswhoa.com
- Report issues - Community website > Contact Us > Submit Concern



ADJOURNMENT

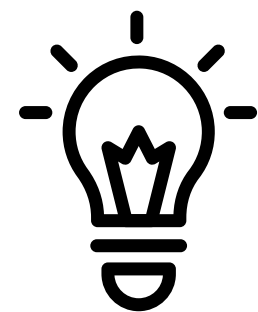
A decorative graphic in the bottom right corner consisting of several overlapping hexagons. The hexagons are in shades of dark red and black, with a textured, slightly mottled appearance. The central hexagon is dark red and contains the text 'Thank you!' in a white, cursive script.

*Thank
you!*

QUESTION & ANSWERS



QUESTION & ANSWERS



Ideas for the community and questions



Please limit comments to 2 minutes or less