

CROWLEY CREEKSIDE HOMEOWNERS' ASSOCIATION, INC.**Records Production and Copying Policy**

WHEREAS, the Board of Directors (the "Board") of Crowley Creekside Homeowners' Association, Inc. (the "Association") wishes to adopt or amend reasonable guidelines to establish Records Production and Copying Policy for the Association; and

WHEREAS, the Board wishes to adopt these reasonable guidelines and/or amend current guidelines in compliance with Section 209.005(i) of the Texas Property Code regarding Owner access to Association documents and records ("Records"); and

WHEREAS, the Board during an Open Meeting of the Board held on 31st day of October 2025, voted by at least majority vote to adopt this **Records Production and Copying Policy** and intends to file these guidelines for The Crowley Creekside Community with Tarrant County, Texas in the real property records of each county in which the subdivision is located, in compliance with Section 209 of the Texas Property Code to ensure an established and reasonable standardized procedure for homeowners to access and obtain copies of Association records; and

NOW, THEREFORE, IT IS RESOLVED that effective the 31st day of October 2025, the following guidelines for Records Production and Copying are established by the Board:

(I) REQUEST FOR RECORDS:

1. A request may be submitted by a property owner or a person designated by the owner in a signed writing (e.g., an agent, attorney, or certified public accountant) and be sent by certified mail to the Association's address as reflected in its most recent Management Certificate filed in the County public records and an owner must indicate whether the owner or proxy would like to inspect the Records before possibly obtaining copies even if the specified Records should be forwarded.

If forwarded, the letter must indicate the format, delivery method, and address:

- i. format: electronic files or paper copies
- ii. delivery method: email, certified mail, or pick-up

(II) CONTENT OF REQUEST:

1. The request must sufficiently detail the specific books and records requested and state whether the owner elects to inspect the records before obtaining copies or to have the Association forward copies.

(III) CONFIDENTIAL RECORDS:

1. The Association is not required to disclose certain confidential records. The following Association Records are not available for inspection by owners or their proxies. This list is not intended to be inclusive and subject to change based on changing Texas Property Code, State Legislative, and other Texas based laws specifically governing the production of records:
 - a. the financial records associated with an individual owner; and
 - b. deed restriction violation details for an individual owner; and

- b. personal information, including contact information other than an address for an individual owner; and
- c. attorney files and records in the possession of the attorney; and
- d. attorney-client privileged information in the possession of the Association.

The information in a, b and c above will be released if the Association receives express written approval from the owner whose records are the subject of the request for inspection.

(IV) PRODUCTION OF RECORDS:

1. The Association will respond to a valid request within ten (10) business days. If copies are requested, the records will be produced within this timeframe, or the owner will be notified of a later date, no more than fifteen (15) business days after the notice.
2. The Association shall make available the current version of the Associations' Documents filed in the county deed records available on an Internet website or other electronic format maintained by the Association or managing agent on behalf of the Association, and available to Members. An owner may also provide access to Records to any other person (such as an attorney, CPA, or agent) they designate in writing as their proxy for this purpose. To ensure a written proxy is from the owner, the owner must include a copy of his/her photo ID or have the proxy notarized. An owner, or their proxy as described in this section must submit a written request for access to or copies of Records. Records can be provided in various formats as stated above. If inspection is requested, it will occur at a mutually agreed time, and the owner will identify records for copying.
3. The Association can charge reasonable costs for compiling, producing, and reproducing records according to this Records Policy. Charges must not exceed amounts specified in Texas Administrative Code §70.3, with labor not exceeding \$15.00 per hour and copies typically \$0.10 per page. The Association may require an advance payment of estimated costs or at the Association's sole discretion, the fees may be billed to the owner's account (upon owner request) so long as the fees are paid within ten (10) days of notice to owner of amounts owed. A final invoice will be provided within thirty (30) business days of delivery, with adjustments made for differences between the advance payment and actual costs.
4. Production of records is contingent upon the Association or its managing agent having possession of the books and records requested. The Association or managing agent are not responsible for the production of books and records it does not possess.
5. The Association's managing agent may and probably will have fees for the production of records. The Association agrees that costs billed to the owner may be used to cover in part, those fees charged by the managing agent for the time, labor, production, and processing of record requests.

(V) RECORDS RETENTION

The Record Retention portion of this Policy ensures that necessary records and documents are adequately protected and maintained and that records that are no longer needed or are of no value are discarded at the proper time. The list is not inclusive and is subject to change based on amendments or updates that may occur from time to time based on Texas Property Code, State Legislation, and other governing laws which may apply.

Texas non-profit organizations must retain certain documents for specific periods, with certain documents requiring permanent retention:

Retention periods by document type

- **Permanent:**

- Certificates of formation
- Bylaws and Rules and Regulations
- Restrictive covenants (CC&Rs)
- Property records (deeds, licenses, insurance, rights-of-ways, etc.)
- All amendments to these documents
- Ballots and Proxies related to document amendments only
- Architectural review requests and responses
- Plans, specifications, permits, and warranties related to improvements upon common areas or other property the Association is obligated to maintain, repair, or replace
- IRS Rulings / IRS or other government audit records
- Tax Documents, Federal and State
- Employee Earnings Records (one copy must be kept permanently)

- **Seven years:**

- All Association Financial reports and records including all receipts and expenditures
- Accurate, itemized, and detailed records of all receipts and expenditures
- Board and owner meeting minutes
- Owner account information
- Financial statements and records of the Association
- Association loan details
- Insurance policies
- Employee Records (other)
- Tax returns, bills, receipts, and statements

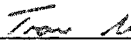
- **Five years:**
 - Account records for current owners
- **Four years after expiration:**
 - Contracts with a term of one year or more
 - All communications between the Association and homeowners must be retained as long as the member owns the home and up to four (4) years after
- **One to Three Years:**
 - Job descriptions (3 years)
 - Non-hired job applicants (2 years)
 - Personnel count records (3 years)
 - Forms such as I-9 (3 years after date of hire or 1 year after separation of employment)
 - Bids received by the Association for work to be performed that were NOT awarded (1 year)
 - Ballots, proxies, and other documentation relating to an annual membership or special meeting (1 year)
- **Other records**
 - The Board can determine the retention period for any other records. If a document is not listed and a question regarding retention requirements arises, the Board or managing agent shall refer to the Texas Property Code or the Association's counsel for information of retention requirements.
 - Periodic review of Texas Property Code for retention requirements should be made before destruction of records.
 - Amendment to this Policy to account for changes in retention requirements as well as other regulations that may occur should be performed when necessary.
- **Destruction of records:**
 - All records no longer required to be maintained by law may be disposed of. Records must be destroyed in a manner to be determined by the Board of Directors.
- **Importance of a records policy**
 - Establishing a records retention policy ensures the association remains compliant with Texas law and helps manage its documents effectively. In addition, these records are crucial for providing transparency to homeowners, who have the right to request certain books and records from the association.

(VI) Applicability.

This Policy applies to all physical records generated during the Association's operation, including both original documents and reproductions. It also applies to the electronic documents described above or maintained by the Association.

IN WITNESS WHEREOF, the undersigned, being the Board President of the Association has executed this Records Production and Copying Policy as of the date first written above.

**CROWLEY CREEKSIDE HOMEOWNERS'
ASSOCIATION, INC.,**
a Texas non-profit corporation

A handwritten signature in dark ink, appearing to read "Travis Biber", is written over a horizontal line.

Printed Name: Travis Biber

Title: Board President