



**MEMBER RECORDS
DEPARTMENT**

Deep Dive

March 30, 2023

MEMBER RECORDS TEAM

THREE FULL TIME COORDINATORS

Karen Kruth - Has been a GRF employee since 2011. She started with the Accounting Department and became part of Member Records in 2012. She enjoys working in Member Records as the job keeps her on her toes everyday and no two days are ever the same. She finds the job challenging and rewarding all at the same time.

Kim Von Striver - A 14-year GRF employee, joined Member Records in 2017. Before coming to GRF, she worked for 21 years as a paralegal specializing in estate planning, probate, and trust administration. Kim's prior experience working as a paralegal comes in handy on a daily basis in Member Records.

Irina Filatova - Has 14 years of experience working in Rossmoor for Securitas, Public Safety Contractor, and as an Administrative Supervisor. Her position was a single point of contact for residents, renters, resident employees, GRF employees/contractors, guests, and vendors. Irina has been working as a GRF Member Records Coordinator since November 1, 2022. It became a natural transition for her because during the years she spent in Rossmoor customer service, Irina has developed a strong bond and passion for the community.

MUTUAL ASSIGNMENTS

Karen Kruth

Mutual Name	Member Count
FWCM Proj 3,4,6,7	888
No. 4	286
No. 8	103
No. 5	18
No. 22	43
No. 28	84
No. 29	106
No. 30	76
No. 48	62
No. 56	37
No. 59	108
No. 61	63
No.65	44
No. 70	172

Kim Von Striver

Mutual Name	Member Count
SWCM Proj 2-10	667
3	1112
39	130
50	110
53	72
55	66

Irina Filatova

Mutual Name	Member Count
FWCM Proj 1, 5	864
SWCM Proj 11-17	635
No. 40	186
No. 58	300
No.68	233

WHAT WE DO

- Process resales
- Process lease, sublease and rental documentation after completion of Mutual board approval
- Process co-occupant, live in employee and guest registration documents
- Maintain resident database: occupancy, emergency information and phone numbers and mailing address changes
- Process ownership transfer documentation
- Update residency documentation
- Responds to inquiries from residents, Mutual Board Directors, realtors, title companies by phone, mail/email or by scheduling an appointment in person

PROCESSING AND SERVICE FEES

Escrow Processing	
Cooperative	\$750.
Condominium or Planned Unit Development	\$500.
Golden Rain Foundation Only (non-MOD managed)	\$200.
Cancellation (if work has been performed, otherwise no cost)	\$100.
Mutual Governing Documents and Required Disclosures Package	\$200.
Includes:	
<ul style="list-style-type: none"> • Articles of Incorporation and Bylaws • Covenants, Conditions and Restrictions • Policies 	<ul style="list-style-type: none"> • Rules and Regulations • Audited Financial Statements and Budget • Other Applicable Disclosures
Mutual Membership Transfer (non-resale) Cooperative/Condominium	\$300/150.
12 Months Approved Mutual Minutes	\$100.
Refinance Processing	\$150.
Project Certification – Lender	\$100.
Project Certification – FHA/VA	\$150.
Resale Inspection	\$350.
Co-Occupant Registration	\$150.
Lease/Sublease Processing	\$150.
Lease/Sublease Extension	\$50.
GRF Facilities Usage Fee (per lessee per month)	\$50.
Resale Certificate Re-draw (vesting change in resale)	\$75.
Lost Membership Certificate Replacement	\$50.
Name Change Membership Certificate Re-draw	\$50.
Hard-copy Production (per 15 min., plus materials)	\$10.

FREQUENTLY REQUESTED FROM MEMBER RECORDS:

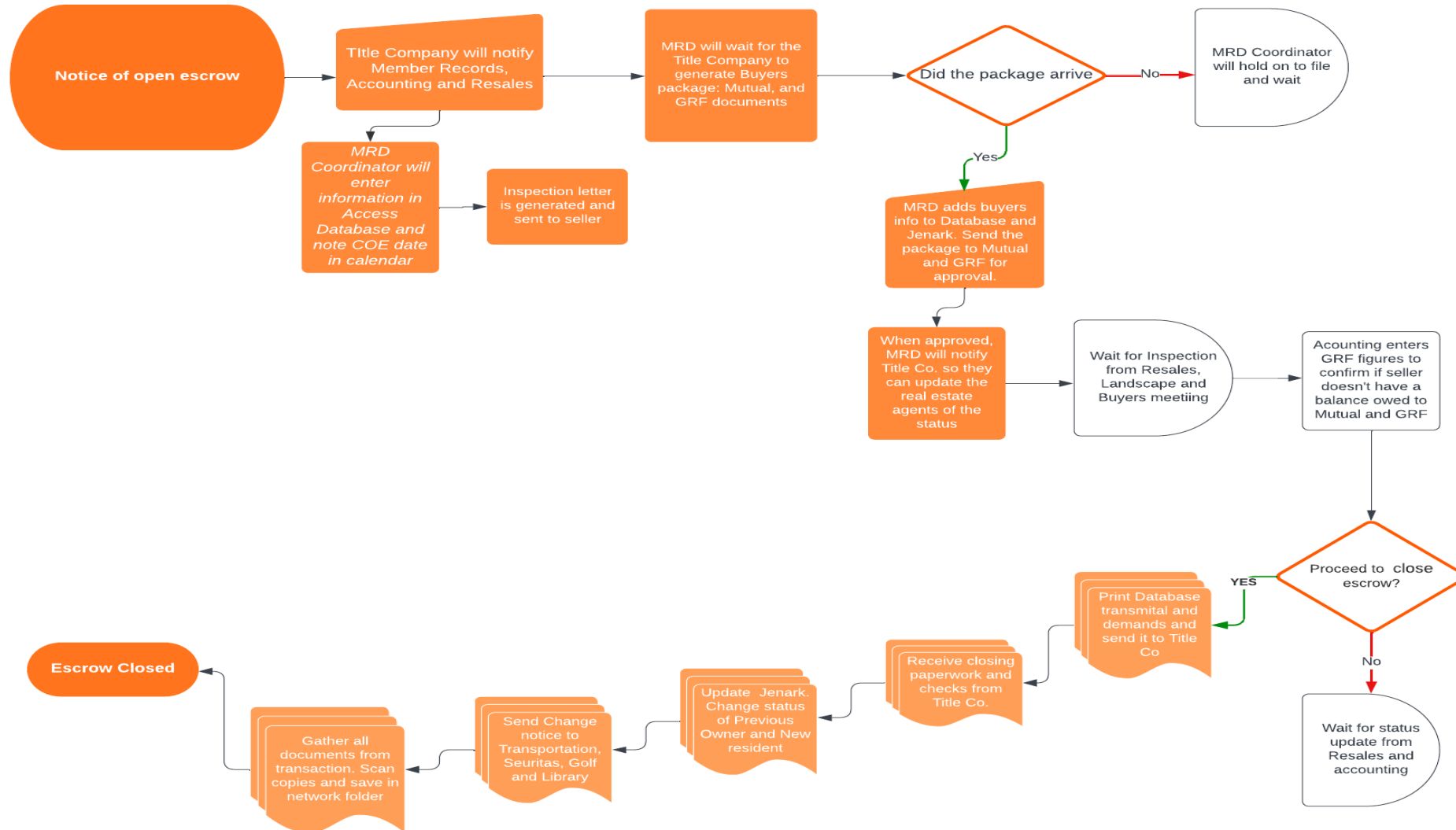


Process Resales



Process lease and rental documentation after completion of Mutual board approval

WORKFLOW ON PROCESSING RESALES



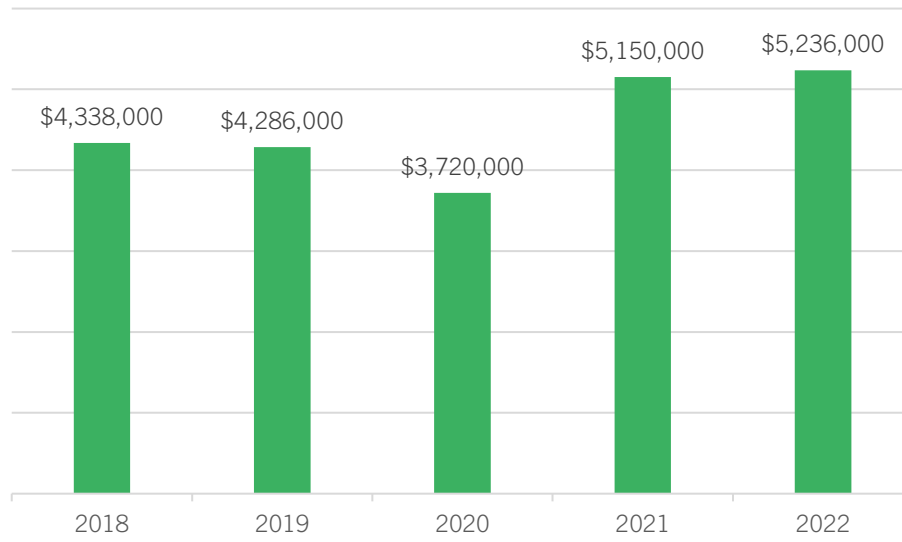
MEMBERSHIP TRANSFER FEE

A Membership Transfer Fee is collected from all new transactions involving the sale or transfer of ownership. Upon becoming a member of the Foundation, a payment of the fee is required in order to obtain access to Foundation amenities. GRF Policy 102.1.4.

Current MTF is \$12,500.

To qualify for an exemption from paying the MTF fee, the following criteria must be met:

- 1) Current Member
- 2) Joining by Non-Member
- 3) Inheritance (transferred to a spouse or registered domestic partner)
- 4) Inheritance held for resale
- 5) Gift
- 6) Trust
- 7) Non-Natural Persons

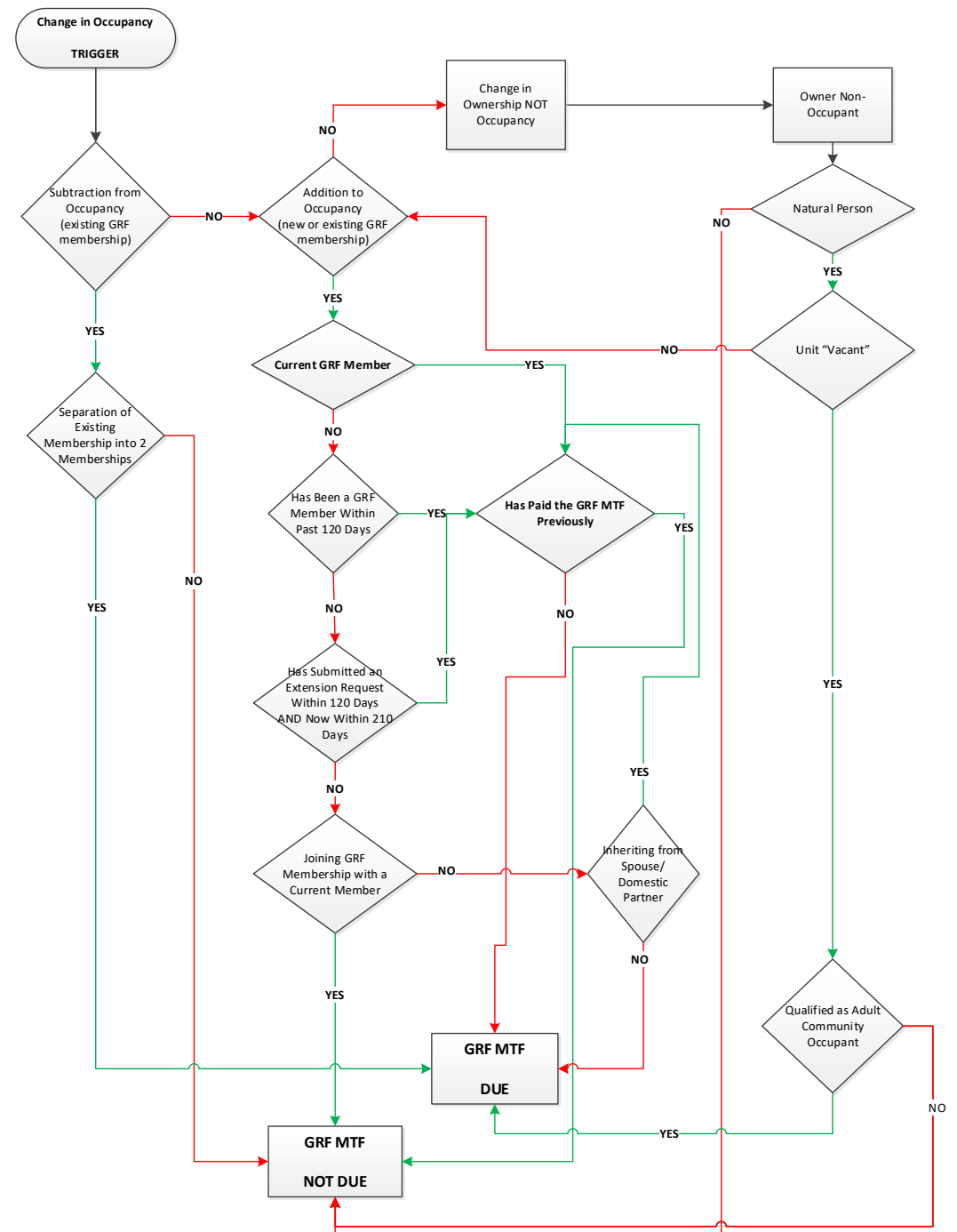


TOTAL AMOUNT OF MEMBERSHIP TRANSFER FEE COLLECTED

2018 - 2022



MEMBERSHIP FEE FLOWCHART



FLIPPERS IN ROSSMOOR:

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- **What is a house flipper?**
 - Instead of buying a home to live in as a primary residence, they're buying property as a real estate investment. The "Flipper" will invest their own money to make renovation and purchase upgrades so the property can be sold for a higher price.
 - **How many active house flippers in Rossmoor?**
 - There are currently 13 active flippers in our records.
 - **Rules for Flippers in Rossmoor:**
 - Flippers are subject to paying the GRF Membership Transfer Fee per Policy 102.1.4. Just like residents who purchase in Rossmoor. If flippers meet the policy criteria for an exemption, then an exemption from paying the GRF Transfer Fee will be granted/approved.
 - Contractors hired by the flipper are subject to rules regarding alterations, which is handled by the Resales/Alterations Department.
 - **How does a house flipper impact Rossmoor?**
 - Pro: Increases the value of properties in Rossmoor and attracts more buyers.
 - Cons: Renovation work can be disruptive to neighbors.

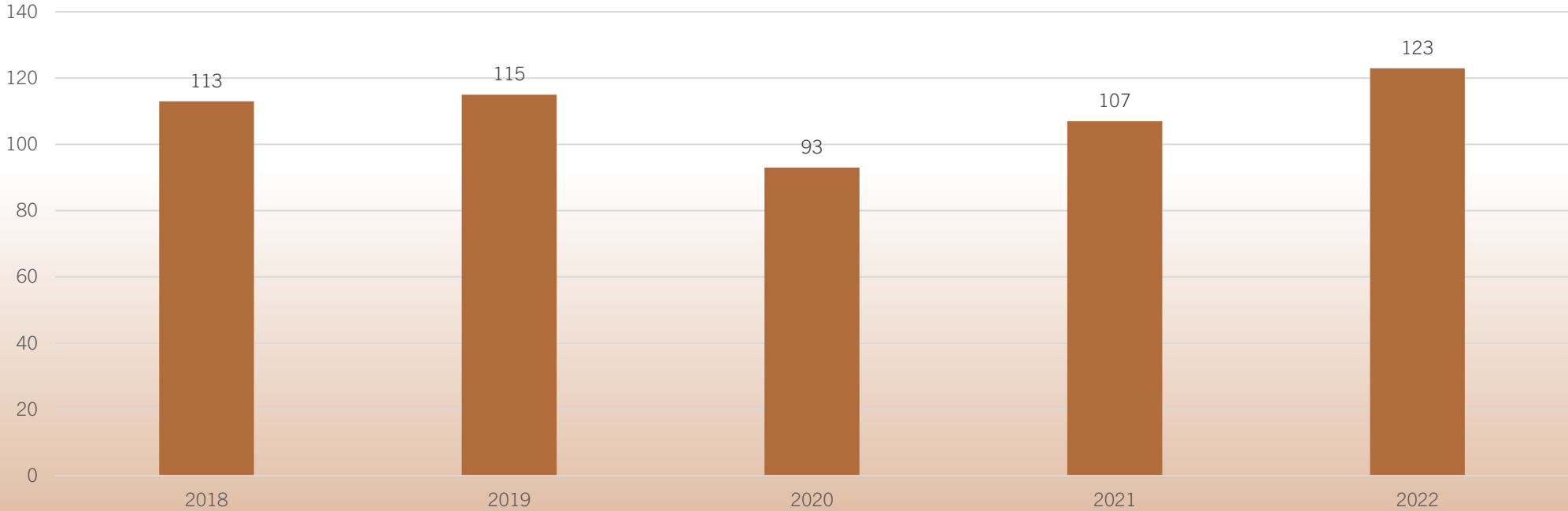
LEASING POLICY

Occupancy of any manor in Rossmoor by a lessee is subject to approval by the applicable Mutual Corporation and MUST register with the Member Records office. Each Mutual Corporation has restrictions pertaining to the leasing of a manor. Before leasing a manor, the lessor/owner should contact their Mutual for specific requirements and must comply therewith.

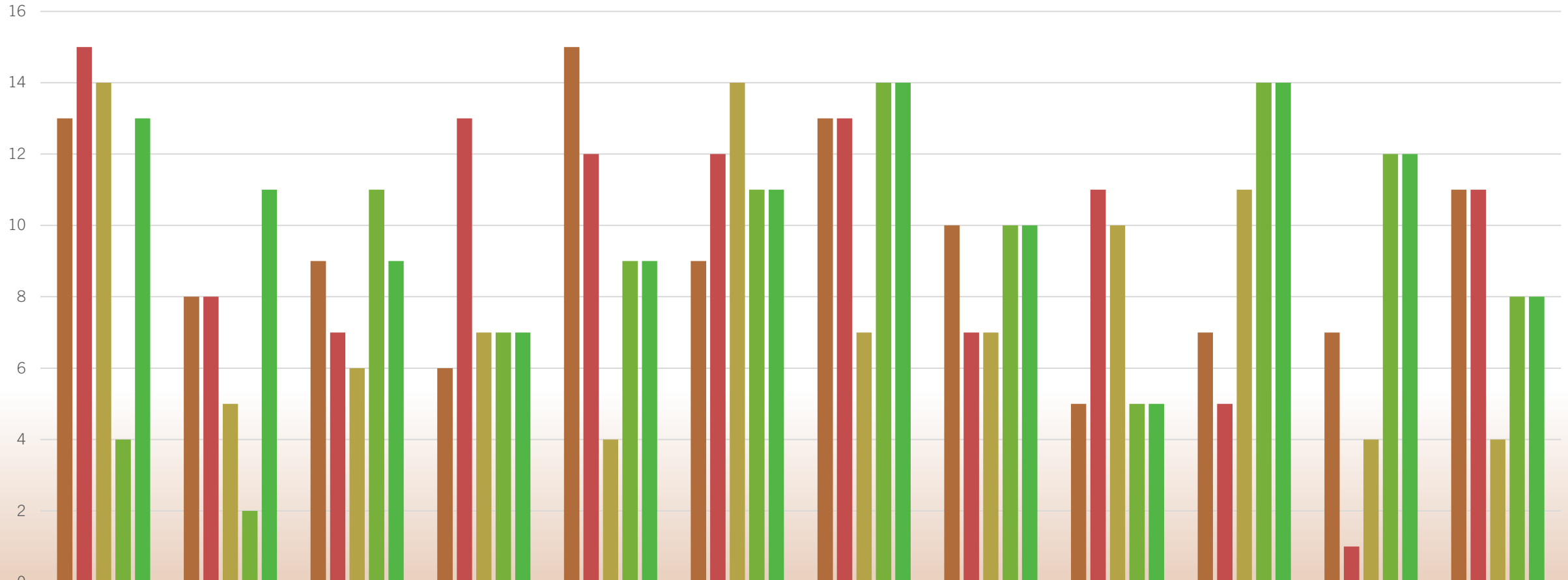
A Golden Rain Foundation Member/owner of record must notify the Foundation when an unoccupied manor is leased, including evidence of acceptance by the applicable Mutual, the identity of the lessee(s), and a copy of the lease agreement including the termination date, along with any other information reasonably requested by GRF. Leasing a unit will not impair the Membership. GRF Policy 104.1.2

GRF charges a facilities usage fee of \$50.00 per lessee per month and a lease processing fee of \$150.00

TOTAL LEASES PROCESSED 2018-2022



LEASE COMPARISON MONTH/YEAR FROM 2018 - 2022

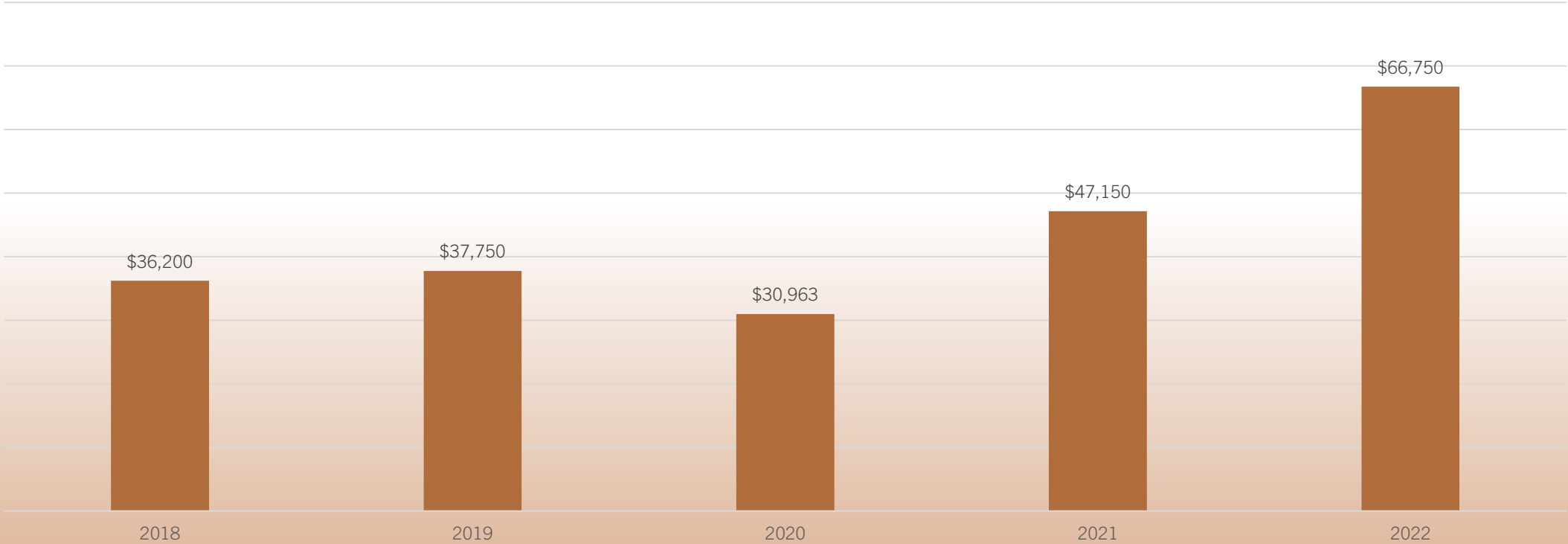


	January	February	March	April	May	June	July	August	September	October	November	December
2018	13	8	9	6	15	9	13	10	5	7	7	11
2019	15	8	7	13	12	12	13	7	11	5	1	11
2020	14	5	6	7	4	14	7	7	10	11	4	4
2021	4	2	11	7	9	11	14	10	5	14	12	8
2022	13	11	9	7	9	11	14	10	5	14	12	8

FACILITY USAGE FEE

\$ 5 0 P E R M O N T H , P E R L E S S E E F O R T H E F U L L T E R M O F T H E L E A S E

Total Facilities Usage Fee collected
2018-2022



RECENT DEPARTMENT ACCOMPLISHMENTS:

Added a 3rd full time coordinator to assist with the increase in workload.

Updated approximately 2,388 resident data in Jenark so that it is consistent and accurate.