



PHONE: (805) 238-9641
FAX: (805) 238-3430
GATEHOUSE: (805) 227-6560

2130 HERITAGE LOOP ROAD
PASO ROBLES, CA 93446
www.hroa.us

Dear New Property Owner:

Welcome to Heritage Ranch. Thank you for purchasing property within the Heritage Ranch boundaries.

To activate your Membership status, a copy of your recorded grant deed is required. A Membership card and your vehicle decals are issued for the primary Owner (or Tenant), plus one co-owner/co-tenant (additional rules apply for cards for trusts, businesses, corporations, or partnerships) at the Member Services Office. You will be able to receive decals for any vehicle or vessel owned in your name. Your registration must be current and the name(s) on the vehicle registrations must match the name(s) on the identification card(s) for decals to be distributed. If you are not eligible for decals, you must use the visitor gate for entry.

Membership privileges include, but are not limited to:

1. Picture identification cards, which entitle property owners to obtain vehicle decals and to use the member lane access pad
2. No boat launch fees except for mussel inspections
3. A permanent guest list of up to six families/guests
4. Boarding of horses at the Equestrian Center (with additional monthly fees)
5. Access to the Heritage Ranch Marina and other recreational facilities
6. Annual voting privileges (subject to account status)

You will notice that your lot/tract number and your member/account number are on your identification card(s). These numbers will usually be requested when you contact the Main Gatehouse house to inform them of guest(s) you are expecting. If you have a large number of guests expected, please e-mail (gate@hroa.us) or fax (805-239-8826) the gate your list.

When using the launch ramp, please have your identification card(s) with you along with your current vessel registration in case a Ranch Patrol Officer wishes to verify your identification. When it is posted, you must have current decals to use any member gate on the Ranch or to park at the Marina (non-decaled vehicles must use overflow parking locations.)

The Membership Handbook of the Rules & Regulations you received at close of escrow gives a brief overview of most of the rules pertaining to our amenities. Further information on some of the topics covered in this booklet can be found in your Covenants, Conditions & Restrictions (CC&R's) specific to your tract and the Heritage Ranch by-laws, also distributed to you at the close of escrow. We recommend that you become familiar with the CC&R's pertaining to your property.

Your assessments are payable quarterly, due as follows: July 1 (1st Quarter); October 1 (2nd Quarter); January 1 (3rd Quarter) and April 1 (4th Quarter). Please mark these dates on your calendar. Payment must be received on or before the 15th of the first month of the quarter or a \$10 fee is assessed. You have the option to pay monthly. However, the payment must be received by the 15th of each month, or a \$10 assessment will be charged each month the payment is late. *FOR YOUR BENEFIT, Autopay for your assessments is available for set up with a check at the HROA office or credit card through the member portal.*

For any changes you are planning to the **exterior** of your home, you will need to request and apply for approval through the Architectural and Environmental Control Committee (AECC). Request forms for all projects are available on our website or at the HROA office. The committee meets on the first and third Thursday of the month. All requests must be received on the Friday prior to each meeting to be on the agenda for review.

Your new member packet contains 1) Your membership paperwork (mandatory) to complete before cards can be issued, plus your permanent guest list (optional); and 2) E-mail opt in Paperwork and 3) this new owner letter. Contact us with questions.

The HROA Member Services Office is open Monday-Friday from 7:30 am to 4:30 pm. It is also open two Saturdays of the month: The first Saturday from 9:00 am to 4:30 pm with a 30-minute lunch break at 12:30 p.m. and the third Saturday from 9:00 am - Noon. The Office is located at 2130 Heritage Loop Road.

The Heritage Ranch Community Services District is your contact for setting up your water, sewer, and garbage needs, as well as any water related issues on your property and/or water emergencies on the ranch.

They are open Monday-Friday from 7:30am to 4:00pm

UTILITY CONTACT INFORMATION

Information and application for utility installations may be obtained as follows:

Water, Sewer, and Garbage initial set-up

Heritage Ranch Community Services District (CSD)

4870 Heritage Road
Paso Robles, CA 93446
(805) 227-6230

Electric

Pacific Gas & Electric Company

24-hour Emergency & Customer Service
(800) 743-5000

Telephone/Internet/Cable

AT&T

Customer Service
1-800-288-2020

Spectrum Charter

Customer Service
1 (833) 694-9259

Propane

Propane is available through various distributors throughout San Luis Obispo County. Check your current propane tank for the current propane provider for your property. Distributors can be found on-line and in the local phone directories.

Garbage Service Account Set-up and Services

San Miguel Garbage (After initially contacting the Community Services District. CSD does your initial set-up)

P.O. Box 249
San Miguel, CA 93451
(805) 467-9283

HERITAGE RANCH OWNERS ASSOCIATION **MEMBER SERVICES OFFICE**

2130 Heritage Loop Road (next to Rock n Robles in the Oak Hill Center)
Paso Robles, CA 93446
(805) 238-9641; FAX (805) 238-3430
E-mail: office@hroa.us
Website: hroa.us

GATE

(805) 227-6560; FAX (805) 239-8826; E-mail: gate@hroa.us

Forms included:

1. Welcome letter - covers the amenities, dues dates, what to do for external changes to the home and utility information.
2. Member Info form-the top portion under owner #1 and #2 is your information. Below are any residents that may live with you here at the Ranch *if you live here full-time*. The primary owner signs the bottom of the form.
3. Permanent Guest List-this is for frequent visitors you do not want to call in every time. You are always welcome to adjust this by contacting the Main Office and/or call-in other visitors at any time by contacting the Gate. Keep in mind those on this list can come onto the Ranch even if you are not here.
4. CC&R's, Bylaws and Rules-This is an acknowledgement (signature, print and date) that there are CC&R's, Bylaws and Rules that need to be followed at Heritage Ranch.
5. Surface Water Acknowledgement-This is an acknowledgment that we are responsible for any drainage issues on the open space, and you are responsible for drainage issues on your own property.
6. Auto pay form for dues- This is an optional form. We also have the option of a coupon book with quarterly coupons for payment. With auto pay you can use a voided check and you can select monthly or quarterly. The payment comes out between the 8th and 10th of the month or quarter, depending on which you select.
7. Membership List Opt-in Opt-out 7-10-2020-A new law passed at the beginning of this year regarding e-mail and mailing lists for HROA residents. If a member requests an e-mail or mailing list of residents for non-business purposes, we are required to give it to them. If you do not wish your e-mail address and/or mailing address to be shared you select 1 and 2 to Opt-out. If you do not mind sharing your information, you select 3 to Opt-in. a. Either way you will still receive all our Ranch notifications especially anything amenity related due to COVID-19 and webinar invitations to meetings. 90-95% of our communication to members is via e-mail.
8. We also have a new form, the HROA Gate Access System Options form. Each address here at Heritage Ranch will have the option of an assigned unique 4-digit code for their family and designated guests to use our new gate access system. This system is now installed at both the Main Gate on Gateway Drive, and the North Gate on Heritage Loop Road. The members will be responsible for sharing this unique code with their designated guests. This does not replace your member cards, and is primarily for your guests, who will enter through the visitor gates. You still have the option to call guests in, and any guests using the code must be called in beforehand. You also have the option of a phone number programmed into the system.

Please bring any vehicle or vessel registrations to your appointment to receive your vehicle/vessel decals.

We also have the new trails guide just published for the Ranch in July 2020. You can download your free copy at:

<https://hroa.us/recreation/hiking-and-trails>

If you would like to be added to the Gaia GPS application, which can be used on mobile devices and desktops, please download the Gaia GPS app at:

<https://www.gaiagps.com>

Once you sign up with Gaia GPS, send an email including your name and the email used for sign-up to office@hroa.us to request activation.

Please let us know if you have any questions.



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2130 Heritage Loop Road
Paso Robles, CA 93446
Website: www.hroa.us

HERITAGE RANCH OWNERS ASSOCIATION MEMBERSHIP INFORMATION FORM

Lot/Tract: _____ / _____ Account/Member ID: _____

Primary Member #1 (Owner) Name: _____

DL#: _____ Home Phone: _____ Mobile Phone: _____

H.R. Property Address: _____

Mailing Address (if different): _____

Primary e-mail: _____

Primary Member #1's Employer's Name and Address: _____

_____ Employer's Phone: _____

Primary Member #2 (Owner) Name: _____

Mailing Address (if different): _____

cc e-mail: _____

DL#: _____ Mobile Phone: _____

Primary Member #2's Employer's Name and Address: _____

_____ Employer's Phone: _____

FULL TIME RANCH RESIDENTS ONLY - **Children living with you** at Heritage Ranch

Name	Age	Sex	OK to Sticker Vehicle
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

FULL TIME RANCH RESIDENTS ONLY - **Any other Residents** living with you at Heritage Ranch

Name	Age	Sex	OK to Sticker Vehicle
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

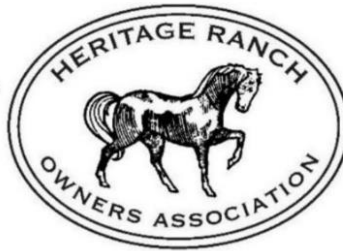
Emergency Contact Name & Phone #: _____

Signature: _____ Date: _____

Signature: _____ Date: _____

For Office Use Only:

Gate	QB	CC	Homeowners	Email Opt In-Out	Code Issued	Autopay
Card(s) Issued		Vehicle Registrations/Decal(s) Issued			Vessel Registrations/Decal(s) Issued	



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HROA PERMANENT GUEST LIST

The Permanent Guest List eliminates the need for OWNERS/TENANTS to call in trusted guests every time they visit. The Association allows each PROPERTY OWNER or TENANT up to six (6) households on a Permanent Guest List (PGL).

PGLs must be kept current. Written authorization by the OWNER/TENANT is required to make changes. **PGLs should be reviewed and updated annually.**

The Association maintains the right to refuse entry to anyone who is deemed to be a nuisance to the community, who adversely affects the health and welfare of the community, and/or who provides inaccurate information when identifying themselves to Association staff.

Reference Membership Handbook – Rules and Regulations, Section 2.04 for additional information on Guest Access.

PLEASE PRINT

Member/ID Account #: _____ Lot: _____ Tract: _____

Name of PROPERTY OWNER: _____

Name of TENANT: _____

Property Address: _____

Mailing address if different from above: _____

Email address: _____

Home Phone: _____ Mobile Phone: _____

PERMANENT GUEST LIST

One line per household or couple. First and Last Name of all guests/family members must be listed.

1. _____ 4. _____

2. _____ 5. _____

3. _____ 6. _____

CALLING IN VISITOR(S) WHO ARE NOT ON THE PERMANENT GUEST LIST

ONLY PROPERTY OWNERS OR TENANTS may authorize guests onto HROA property. RESIDENTS with an HROA ID Card may also call guests in. Authorization may be done verbally by calling the MAIN GATE or by sending an email to gate@hroa.us. An optional Visitor Access Code is also available. Visitor/guest access requests must include the PROPERTY OWNER/TENANT/RESIDENT name and Member/Identification number (located on HROA ID Card) following information:

- Lot and Tract number
- Full names of ALL guest(s)
- Date and time of arrival as well as length of stay

Authorization for guest entry into Heritage Ranch by PROPERTY OWNERS, TENANTS OR DESIGNATED RESIDENTS, no matter the method used, shall apply to named guest(s) only. Guests who are not specifically named will not be allowed entry to Heritage Ranch property. I understand by signing this form that the permanent guests I have listed have my permission to gain entry to my residence, whether I am on the Ranch or not. I further understand that I am totally responsible for the conduct of my guest(s), whether permanent or called in. **I also acknowledge responsibility for any damage or liability that my guests may incur while they are on Heritage Ranch property.**

Signature of PROPERTY OWNER/TENANT (REQUIRED)

Date



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SUBJECT: CC&R'S, BYLAWS AND RULES ACKNOWLEDGEMENT

I hereby acknowledge receipt of the Heritage Ranch Owners Association Covenants, Conditions and Restrictions (CC&R's), Bylaws and the Membership Handbook - Rules and Regulations as provided to me by the Title Company as part of my escrow documentation. **I agree to abide by these Governing Documents.**

I understand that I am liable and financially responsible for any damage to HROA property and that in addition, all use of the Association facilities will be revoked or suspended as a result of any such damage or violations of HROA CC&R's, Bylaws and Rules and Regulations. I also understand that I am liable and financially responsible for any damage or violations committed by my guests.

I am aware that no obnoxious or offensive activities shall be carried on, nor shall anything be done that shall be or become an annoyance to the neighborhood.

HERITAGE RANCH OWNERS ASSOCIATION

SIGNATURE OF PROPERTY OWNER _____ DATE _____

PRINTED NAME OF PROPERTY OWNER _____

Account/Member # _____ Lot#/Tract#: _____/_____

Received by: _____ Date: _____
Employee Signature



Email: office@hroa.us
Phone: (805) 238-9641
Fax: (805) 238-3430

2130 Heritage Loop Road
Paso Robles, CA 93446
Website: www.hroa.us

SUBJECT: SURFACE WATER RESPONSIBILITY

Dear Homeowner,

Substantial precipitation over an undefined period of time may cause surface water to flow upon the land of unimproved and improved lots within a tract, which could cause substantial damage. Some Homeowners are under the impression that is the responsibility of, and should be remedied by, the Heritage Ranch Owner's Association.

This notice is to serve as a formal disclaimer by the Heritage Ranch Owner's Association of any duty or responsibility for any damage that might be caused in the past or the future by surface water.

The Heritage Ranch Owners Association assumes no responsibility for maintenance and/or land repair not included as common area of the Owners Association, lands and/or easements which have not been dedicated and accepted by the Heritage Ranch Owners Association, and/or any improvements on said property which surface water may be naturally or artificially diverted.

Should you predict a surface water problem, contact your predecessor owner to discuss what steps might be taken to alleviate this potential problem.

HERITAGE RANCH OWNERS ASSOCIATION

SIGNATURE OF PROPERTY OWNER _____ DATE _____

PRINTED NAME OF PROPERTY OWNER _____

Account/Member # _____ Lot#/Tract#: _____/_____

Received by: _____
Employee Signature

Date: _____



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Heritage Ranch Owners Association Membership List Opt-In / Opt-Out Form

California Civil Code Section 5220 currently allows homeowners association members to request names and US Postal Service (USPS) mailing addresses of other members provided the association receives assurance of appropriate usage. With the passage of Senate Bill SB323 effective January 1, 2020 the statute now allows members to request member email addresses as well. Members may opt out of sharing this information so long as the Association provides an alternative process in accordance with California Corporations Code 8330.

IMPORTANT: HROA uses email to convey timely and cost-effective member communication. **We ask members not to unsubscribe from HROA email list.** We will not share your information with other members if you opt out. **You have the options to Opt-Out of sharing your E-mail (Option 1) and/or your mailing address (Option 2).**

To opt out of both please select BOTH options 1 and 2. This indicates we will not share your e-mail or your mailing addresses. **If you are ok with us sharing your information, please select Option 3.** Please complete the section below to ensure the Association responds to member information requests in accordance with your wishes.

Member Name	Member #	Lot/Tract
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Mailing Address

Email Address(es)

☐ **Option 1**

I choose to be added to or to remain on the HROA email list and choose to **OPT OUT** of email address sharing with other members.**

☐ **Option 2**

I choose to **OPT OUT** of USPS property/mailing address sharing with other members.**

☐ **Option 3 (Only if neither Option 1 or Option 2 were chosen)**

I understand that if I take no action, I will remain on the HROA email list AND my email and USPS mailing address may be made available to other HROA members upon receipt of a written request which has been verified to be appropriate for Association use.

**I understand that I will continue to receive electronic communications from HROA, but my email address(es) will not be shared with other members. I also understand HROA is required to ensure compliance with California Corporations Code 8330 and must provide an alternative method which reasonably and in a timely manner accomplishes the purpose of the demand for this information.

Member Signature

Date

Please submit your response to
office@hroa.us or Heritage Ranch Owners Association
2130 Heritage Loop Road, Paso Robles, CA 93446



Phone: (805) 238-9641
Fax: (805) 238-3430
Email: office@hroa.us

2130 Heritage Loop Road
Paso Robles, CA 93446
Website: www.hroa.us

Request for Annual Preferred Delivery Methods, Representative, and Rental Status

Civil Code §4041 requires each owner of a separate interest to provide written notice to the Association of all the following information annually. **Please provide the information in the form below and return the completed form to the Association within 30 days.** If you do not provide a valid delivery method pursuant to *Civil Code §4041*, the last mailing address provided in writing by the member or, if none, the property address shall be deemed to be the address to which notices are to be delivered. (*Civil Code §4041(c).*) To change your preferred delivery method or other information, contact the Association's designated contact in the Annual Policy Statement.

☐ By checking this box, I/We agree the below information will remain effective from year to year unless changed by a Member in writing.

1. **Heritage Ranch Property Address:** _____ **Lot** _____ **Tract** _____

2. **Member Name(s):** _____

3. **Member's Preferred Delivery Method (Check one or both and provide the information.)**

NOTICE: Members do not have to provide an email address to the association.

☐ A valid mailing address: _____

☐ A valid email address: _____

4. **An alternate or secondary delivery method for receiving notices from the Association.**

(Optional. Choose one or both, if desired, and provide the information.)

☐ A valid mailing address: _____

☐ A valid email address: _____

5. **The name, mailing address and, if available, valid email address of your legal representative(s), if any, including any person with power of attorney, or other person who can be contacted in the event of your extended absence from the Heritage Ranch property. Please include documentation verifying authority of legal representative(s).**

6. **Is the Heritage Ranch property –**

☐ Owner occupied

☐ Rented

☐ Developed, but vacant

☐ Undeveloped

7. **Return form to:** By mail: Heritage Ranch Owners Association
2130 Heritage Loop Road
Paso Robles, CA 93446

By email: office@hroa.us
By Fax: 805-238-3430

8. **By signing below, I attest that I am the owner of record of the above-referenced property.**

Member Signature(s): _____



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HROA Visitor Access System Request Form

Heritage Ranch Main and North Gate Visitor Lanes

The Heritage Ranch Visitor Access System affords Members and Tenants two options to streamline access for **family and designated guests** at the Main and North Gate Visitor Lanes. They can use an assigned, unique 4-digit code.

Members/Tenants will be responsible for sharing this unique code with their designated guests. In addition, there is an option of a listing on the Gate Access Panel Directory which allows guests the option to call the Member/Tenant for admittance over the telephone. ***Please note: This code supplements your current HROA Member/Tenant Permanent Guest List. Guests who are not on a Permanent Guest List must still be called into the Gate. These access options are intended for use as a convenience for authorized guests only and may be revoked if misused.***

Use of the Visitor Access Code or Gate Directory is optional and is not a gate card replacement. Complete and return this form to the Member Services Office via e-mail (office@hroa.us), fax (805-238-3430), in person or mailed to 2130 Heritage Loop Road, Paso Robles CA 93446.

HROA Member/Tenant ID # _____

Lot/Tract _____ Member/Tenant Name _____

Mailing Address _____

Email Address(es) _____

Please select one of the following options:

- ☐ Option 1 -- Four Digit Code (HROA assigned) *
- ☐ Option 2 -- Phone Number**
- ☐ Option 3 -- Both: Four Digit Code (HROA assigned) * and Phone Number**
- ☐ Option 4 -- No code or phone number. I understand that if I choose this option, I am responsible for my guest's entry into the Ranch. I will continue to call/e-mail the front gate with my incoming guest information.

*How do you prefer to receive your code: e-mail ☐ mail ☐ **Please allow 7-10 business days to receive your code.**

**Please remember cell service is unreliable in some areas of Heritage Ranch. You may want to consider providing your guests a land line number. If you choose the phone option, your last name and/or first initial will be visible for scrolling on the keypad display.

Member Signature

Date

Please submit your response to:
office@hroa.us or Heritage Ranch Owners Association
2130 Heritage Loop Road, Paso Robles, CA 93446



Email: office@hroa.us
Phone: (805) 238-9641
Fax: (805) 238-3430

2130 Heritage Loop Road
Paso Robles, CA 93446
Website: www.hroa.us

AUTOMATIC ASSESSMENT PAYMENTS

JULY 1, 2024

The Heritage Ranch Owners Association (HROA) offers members a convenient way to pay assessments. Simply complete this form, sign and date it and return it to us. Contact our Accounting Department for information on credit card payments through our portal accountsreceivable@hroa.us or 805-238-9641.

Effective 07/01/24, the assessment amount for all tracts is \$450.00 per quarter (\$150.00 per month). In addition, **Tract 447 only** pays a trash assessment of \$63.00 per quarter (\$21.00 per month) making the amount due to HROA \$513.00 per quarter (\$171.00 per month). All other tracts pay San Miguel Garbage directly for curbside trash service.

It is understood that if the assessment amount increases, the charge to your account will be increased to the new amount. The amount will be deducted quarterly unless specified as monthly.

Print Name: _____

Lot/Tract: _____ **Member No:** _____

Telephone Number including area code: _____ **Email Address:** _____

Payment Frequency (circle one): Quarterly Monthly

Payment Method:

CHECKING ACCOUNT (Please attach a voided check) **OR SAVINGS ACCOUNT**

BANK ROUTING NUMBER (9 DIGITS) _____

BANK ACCOUNT NUMBER _____

By signing below, I authorize HROA to charge my account indicated above for Quarterly Assessments after the first day (usually around the 10th) of each month or quarter (July, October, January, and April). I agree to allow 15 days' notice when cancelling this service. Cancelled or non- sufficient funds accounts will be charged **\$35.00 per item returned or denied.**

Signature: _____ **Date:** _____