

Carriage Mill
Care of Clark Simson Miller
PO Box 26941
Charlotte, NC 28221
www.csmhoa.com

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March 21, 2023

Dear Homeowner,

Your volunteer homeowner association board has diligently interviewed a number of management companies in and around your area, and Clark Simson Miller is honored that they have retained our firm as the management company of choice. **Clark Simson Miller will assume this responsibility effective April 1, 2023.** As your association is currently in transition with our company, we ask for your patience and understanding while we transfer your association files into our system. It generally takes at least 30 days to completely gather all of the necessary information.

Our primary goal is to provide financial management services to your community. This includes the billing and collection of dues payments, handling association invoices from vendors, providing administrative support to the board, and working together to help the association meet its short term and long term financial obligations.

As such, Clark Simson Miller only handles concerns within the financial realm of managing the association. For more streamlined assistance, we have several teams here who can assist you. Please contact any one of them for your financial HOA needs.

We strongly encourage all homeowners to use the online portal for basic inquiries as it has your account balance, contact information, and other information related to the association. Please keep in mind that some of this information will not be available until after the transition period as we are working to load everything into our system.

For “non-financial” concerns such as maintenance requests, violation inquiries, etc, please reach out to your Board of Directors for assistance.

We welcome you to the Clark Simson Miller family. We use the word family because it truly reflects how we feel about the communities that select us. Welcome to a new level of service. Welcome home to CSM.

Kind Regards,
Clark Simson Miller

Contacting CSM

Clark Simson Miller only handles concerns within the financial realm of managing the association. For more streamlined assistance, we have several teams here who can assist you. Please contact any one of them for your financial HOA needs.

Support@csmhoa.com

Community Support is here to help you with any of your general inquiries and needs.

Accounting@csmhoa.com

The Accounting Team can assist you with any of your Accounting concerns including late fee inquiries, balance concerns and payment inquiries.

ACH@csmhoa.com

The ACH Team assists with all matters related to the ACH payment method. Need to cancel your draft or change the account we are debiting from? Please email ach@csmhoa.com

Closings@csmhoa.com

If you are selling your home soon and need a Condo Questionnaire or Closing Statement completed, contact the Closings Team.

Online Portal: HOA Vine

Please sign into our Online Portal: HOA Vine. Vine gives you online account access to view and download your governing documents, check your account balance, make payments, and more.

Your 3-word phrase is: ecstatic-elk-reside

To register for a new user account, please visit: app.csmhoa.com/register

Some items to remember:

- Only one registration is allowed per property.
- Vine features a two-step registration process for increased security.
- You will need a three-word pass phrase to register for Vine. This pass phrase can be found above. If you do not have your three-word phrase, please email phrase@csmhoa.com for assistance.

To begin the registration process, please visit app.csmhoa.com/register. On the first screen you will enter your name, email address, and create a password. The system will send you an email to verify your email address. If you do not receive it, please check your spam folder.

Please click on the link in the email to open a browser page. You will then enter your three-word pass phrase on this page. Once entered, your registration to Vine is complete. Your 3-word phrase is at the top of this PDF.

Your 3-word phrase is: ecstatic-elk-reside

An instructional video on how to register and navigate Vine can be found by visiting: www.csmhoa.com/vine. For owners who have multiple units in one or more of our associations, you will now be able to register all your properties under a single Vine account.

Contact Information: Please visit Vine to make sure we have your up-to-date contact information. Please remember to update your account anytime you make changes to your contact info.

Instructions for Dues Payment

Please make all checks payable to “Carriage Mill” and **use the address below for all dues payments.** Checks or Online Banking must show the following:

1. Management Co ID: 4547
2. Association ID: 664
3. Account Number: 38.00

Please note: when entering this on CITs payment portal, you will need to include the decimal point.

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Care of Clark Simson Miller
P O Box 52344
Phoenix, AZ 85072-2344

Instructions for Online Payments

In addition to sending a check, CSM offers multiple options for owners to pay their dues. To pay your dues online, please visit <https://csmhoa.com/pay> and click the “Pay Dues Online” button. We accept electronic checks, ACH draft, and all major credit cards. Please note that credit card payments will incur an additional fee of 4% by the bank to cover the processing costs and e-check payments will have a processing cost of \$1.95.

Instructions for Automatic Withdrawal of Association Dues (ACH)

We offer an automatic withdrawal program as a way to pay your Association dues. If you wish to sign up for the ACH draft, please complete the enclosed form and return to our office. Special Assessments and all additional assessments passed by your association are **not** automatically drafted so be sure to indicate on the form if you want additional assessments drafted. **NOTE:** Most transitions take up to 30 days to receive all of the necessary information about the Community from the previous managing agent. Because of this, **we are unable to draft a community during the first month of a transition.** (Ex. If your community starts January 1, we cannot draft until February). You have the option to remit payment the first month (by utilizing one of the payment methods detailed above) or you can authorize for us to double draft you the following month. Authorization to “double-draft” can be indicated on your completed ACH form.

Or, you can email ACH@csmhoa.com. If you do not have computer access, please contact CSM support at 865-315-7505.

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AUTOMATIC DRAFT OF HOMEOWNERS' ASSOCIATION DUES

Clark Simson Miller offers the convenience of Automatic Direct Draft (ACH Draft) for your association assessments. The ACH Draft eliminates the need for you to write checks by debiting your homeowners' association assessments from your bank account. The account that you submit below will be **charged between the 5th -10th of each billing cycle. To cancel the draft or change the account from which your dues are drafted, you must notify Clark Simson Miller in writing no later than the 3rd of the month to ensure changes/cancellation for that same month.**

To set up the Automatic Draft, return this completed authorization form with a voided check. Forms received without a voided check will be processed using the numbers provided. **Bank returns due to incorrect routing or account numbers on the form will be subject to a returned check fee which will be charged to your account.** Your dues account should be current before setting up ACH draft. *ACH Draft forms must be received by the 20th of the month prior to the month you want the draft to begin.*

AUTHORIZATION AGREEMENT FOR AUTOMATIC DRAFTS

******PLEASE NOTE:** The ACH Draft is set up to debit your HOA dues ONLY. If your Association has another regularly occurring assessment (such as cable, water, special assessment, etc.), we can draft this amount with your permission. If a special assessment is passed, we will not automatically deduct those funds unless authorized by you. Please indicate below how you want additional assessments to be handled.

Yes, I want additional assessments drafted with my regular Association dues.

No, I do not want any additional assessments drafted with my regular Association dues. I will remit payment separately.

Please circle the month that you would like for your ACH draft to begin:

JAN FEB MAR APR MAY JUN JUL AUG SEPT OCT NOV DEC

Most transitions take up to 30 days to receive all of the necessary information about the Community from the previous managing agent. Because of this, **we are unable to draft a community during the first month of a transition.** Please indicate below if you would like CSM to "double-draft" the first month (2 months' worth of dues) to ensure your account is current.

YES, please double draft my dues.

NO, I will remit payment by physical check, bill pay or with an online payment for the first month.

I hereby authorize Clark Simson Miller, Agent for Carriage Mill Homes Association to initiate debits from my checking account at the financial institution listed below. Dues will be deducted between the 5th and 10th of each billing cycle. This authority shall remain in full force and effect until Clark Simson Miller has received written notification from me of its termination, allowing reasonable time to act on my notification. I also understand that if corrections in the debit amount are necessary, it may involve an adjustment (credit or debit) to my account.

This Authorization is Non-Negotiable and Non-Transferable.

Homeowner Name: _____

Property Address: _____

Phone: _____ Email: _____

Name of Financial Institution: _____

Routing (ABA) #: _____ Account #: _____

Signature: _____ Date: ____/____/____

Return form to:

865-315-7506 (fax) | Ach@csmhoa.com (email) | PO Box 26941 Charlotte, NC 28221 (US Mail)