



Anthem Community Council, Inc.

3701 W. Anthem Way | 2nd Floor

Anthem, AZ | 85086-1001

623-742-6050 [P] | 623-742-6170 [F]

CONSOLIDATED ANTHEM PLANNED UNIT DEVELOPMENT FEES & CHARGES VALID THRU DECEMBER 31, 2022

Community Name	Components of Assessments <i>Assessments are invoiced quarterly in advance and are due and payable on Jan. 1, April 1, July 1 and Oct. 1 each year</i>		Monthly ACH <i>(see explanatory notes)</i>	Quarterly
Anthem Country Club Community Association, Inc. (ACCCA)				
	Assessments Payable to the ACCCA (HOA)		\$100.00	\$300.00
	Assessments Payable to the ACC		\$70.50	\$211.50
	TOTAL COMBINED ASSESSMENT		\$ 170.50	\$ 511.50
	Additional fees required to be paid to the AGCC - Anthem Golf & Country Club (ClubCorp) , a third-party <u>unaffiliated</u> entity that owns and manages the golf courses and amenities located within the ACCCA (HOA) property. Contact 623-742-6245 or AGCCstmt@ClubCorp.com	<i>(Billed monthly and directly by the AGCC)</i>	\$255.00	
Anthem Parkside Community Association, Inc. (APCA)				
	Assessments Payable to the APCA (HOA)		\$16.15	\$48.45
	Assessments Payable to the ACC		\$70.50	\$211.50
	TOTAL COMBINED ASSESSMENT		\$ 86.65	\$ 259.95
Anthem Parkside Community Association, Inc. (APCA) LANDING NEIGHBORHOOD				
	Assessments Payable to the APCA (HOA)		\$16.15	\$48.45
	Assessments Payable to the APCA LANDING	<i>(Benefited)</i>	\$23.76	\$71.28
	Assessments Payable to the ACC		\$70.50	\$211.50
	TOTAL COMBINED ASSESSMENT		\$110.41	\$ 331.23
Anthem Parkside Community Association, Inc. (APCA) PASEO NEIGHBORHOOD				
	Assessments Payable to the APCA (HOA)		\$16.15	\$48.45
	Assessments Payable to PASEO (ACC)	<i>(Benefited)</i>	\$49.00	\$147.00
	Assessments Payable to the ACC		\$70.50	\$211.50
	TOTAL COMBINED ASSESSMENT		\$135.65	\$ 406.95
Village at Anthem Condominium Council of Co-Owners (VACCC)				
	Assessments Payable to the VACCC (HOA)		\$313.00	\$939.00
	Assessments Payable to the ACC		\$47.80	\$143.40
	TOTAL COMBINED ASSESSMENT		\$360.80	\$ 1,082.40

CONTACT INFORMATION FOR ANTHEM COMMUNITIES

Anthem Community Council, Inc.

[MASTER ENTITY; SELF MANAGED]
3701 W. Anthem Way #201
Anthem, AZ 85086
623-742-6050 [P]
623-742-6170 [F]

Mr. Aaron Baker
Executive Director
623-742-6050 [P]

Abaker@anthemcouncil.com

Mr. Paul Conley
Sr. Director of Finance
623-742-6050 [P]

PConley@anthemcouncil.com

Community Center
623-879-3011 [P]

Civic Building
623-742-6050 [P]

Village at Anthem Condominiums

[Condominium Association – HOA]
3701 W. Anthem Way #201
Anthem, AZ 85086

Brown Management
7255 E. Hampton Ave, Ste. 101 Mesa,
AZ 85209

Ms. Sarah Kielblock
Community Manager
480-539-1396 [P]

sarah.kielblock@brownmanagement.com

Anthem Country Club Community Association, Inc.

[Homeowners' Association – HOA]
3701 W. Anthem Way #201
Anthem, AZ 85086
623-742-4530 [P]
623-742-6170 [F]

Associated Asset Management (AAM)
1600 E. Broadway Road # 200
Tempe, AZ 85282

Ms. Margaret Troyer, Community Manager
623-742-4561 [P]
MTroyer@associatedasset.com

Ms. Jacki Nasi, Administrative Assistant
623-742-6030 [P]
JNasi@associatedasset.com

Mr. Nick Galaviz, Community Access Administrator
623-374-2019
NGalaviz@associatedasset.com

Mr. Dave Hunt, Community Access Coordinator
623-742-4533 [P]
DHunt@associatedasset.com

Anthem Golf & Country Club (AGCC)

[Third-party Unaffiliated Operator]
2780 W. Anthem Club Drive
Anthem, AZ 85086
623-742-6245 [P]

Attn: Judith Abrego
623-742-6245 [P]
AGCCSTMT@OurClub.com

Anthem Parkside Community Association, Inc.

[Homeowners' Association – HOA]
3701 W. Anthem Way #201
Anthem, AZ 85086
623-742-4563 [P]
623-742-6170 [F]

Associated Asset Management (AAM)
1600 E. Broadway Road #200
Tempe, AZ 85282

Ms. Mary Beth Zahn, Community Manager
623-742-6004 [P]
MZahn@associatedasset.com

Ms. Debbie Siegel, Administrative Assistant
623-742-4562 [P]
DSiegel@associatedasset.com

Gate Transponders – The Landing Community
623-742-4562 [P]

FEES PAYABLE UPON CLOSE OF ESCROW

Community Enhancement Fee (Residential) **Calculation:** **1/4 of 1% of Gross Selling Price of All Residential Property**
This fee is payable to the Anthem Community Council upon close of escrow, collected by the TITLE Company.

Community Enhancement Fee (Residential) **Calculation:** **1/4 of 1% of Gross Selling Price of ACCCA Property**
Effective on October 1, 2018, for properties located in the Anthem Country Club Community Association (ACCCA) ONLY there is an ADDITIONAL Enhancement Fee payable of 1/4 of 1% of the gross selling price of the property. This fee is payable to the Anthem Community Council upon close of escrow, collected by the TITLE Company.

Prepaid Assessments **Calculation:** **One Calendar Quarter of Assessments**
The Anthem Community Council collects one full quarter of advance assessments from the buyer's account at time of close of escrow. This prepaid amount is independent of whatever allocation is made between buyer and seller for the then-current calendar quarter fees.

Resale Disclosure Fees **Calculation:** **\$365 flat fee**
The Anthem Community Council charges a flat \$365 fee for the preparation of Resale Disclosure documents, including a standardized PUD Questionnaire and other related documents. Updates to the Resale Document are \$25 each. Rush charges are \$25. These fees are collected by the TITLE Company at close of escrow. This fee covers both the Master and Sub-Association.

PUD Questionnaire (ONLY) **Calculation:** **\$75 flat fee**
The Anthem Community Council charges a flat \$75 fee for the preparation of a PUD Questionnaire (only) as requested by any interested party. This fee is NOT charged if a full Resale Disclosure Package is ordered. This fee covers both the Master and Sub-association.

Refinance Statements **Calculation:** **\$75 flat fee**
The Anthem Community Council charges a flat \$75 fee for the preparation of a Refinance Statement. This are invoiced directly to the current owner's account with the Anthem Community Council.

RESALE DISCLOSURE PACKAGE

Community Enhancement Fee (Non-Residential) Calculation: Sliding Scale based on selling price of property

This fee is payable to the Anthem Community Council upon close of escrow, collected by the TITLE Company.

Resale Disclosure Fees Calculation: \$365 flat fee

The Anthem Community Council charges a flat \$365 fee for the preparation of Resale Disclosure documents, including a standardized PUD Questionnaire and other related documents. Updates to the Resale Document are \$25 each. Rush charges are \$25. These fees are collected by the TITLE Company at close of escrow. This fee covers both the Master and Sub-Association.

Resale Disclosure Package – Contents

In preparing the Resale Disclosure Package on behalf of the Buyer, Seller and Title Company, the Anthem Community Council provides email information to the various parties which includes, but is not limited to:

- Bylaws and Governing Documents of the Sub-association and Master Entity;
- Covenants, Conditions and Restrictions of the Sub-association and Master Entity;
- A Schedule of Fees and Amounts Due and Collectible on the property at time of close of escrow;
- A Detailed Planned Unit Development Questionnaire (PUD) that responds to issues and questions of a transition of ownership of a property. The Anthem Community Council does NOT provide a customized response document to any Title Company or Financing Organization; we provide only our Standard PUD Questionnaire;
- Information referencing the insurances carried by the Sub-association and Master Entity;
- A schedule of any current or in-process legal proceedings against the Sub-association or Master Entity;
- Information containing all other legally required information required to be provided by law by the Master Entity or Sub-association as to the property; financial condition of the community; ongoing assessments; special assessments; funding held by the Sub-association or Master Entity for Reserve Fund; contact information;
- Current-year Operating Fund Budget for the Sub-association and Master Entity;
- Immediately past-year audited financial statement for the Sub-association and Master Entity;
- Most recent Reserve Study(ies) for the Sub-association and Master Entity; and
- A link to the community website, *OnlineAtAnthem.com*, which provides all of the above information.

The above information is sent as “links” to the underlying documents and is also available ONLINE at the community’s website, *OnlineAtAnthem.com*.

EXPLANATORY NOTES ON FINANCIAL OBLIGATIONS

- Residential assessments are due quarterly in advance within the Anthem community, for the Anthem Community Council (ACC) and its sub-associations: APCA (Parkside); ACCCA (Country Club); and VACCC (Villages at Anthem Condominiums).
- Quarterly assessments are due on **January 1, April 1, July 1 and October 1** of each calendar year, paying in advance.
- Assessments are considered **LATE if received after the 1st of the month due**. Anthem currently provides a grace period through the 15th of the month due or the Friday preceding the 15th if the 15th falls on a weekend. Late fees of \$15 are assessed to all late payments not received by the ACC at the close of the grace period. Additional collection costs accrue if the assessment obligations remain outstanding beyond the grace period.
- The ability to pay assessments on a monthly basis is **ONLY** provided if the property owner signs up for the ACC’s “Direct Deposit ACH Program.” There is no authorized “create your own” monthly payment program – only the ACH program. “Create your own” type payments will incur late fees.
- Assessments or any other charges outstanding beyond 30 days after due date are subject to a \$30 collections fee. Assessments or any other charges outstanding beyond 60 days after due date are subject to a \$45 collections fee. Assessments or any other charges outstanding beyond 75 days after due date are subject to a \$50 collections fee. Subsequent Collection Letters, if issued are subject to a \$50 collections fee for each letter issued.
- Assessments or any other charges unpaid after 90 days may be handled by a collections attorney and all incurred legal charges are added to the property’s owners account as incurred.
- Payments by check, ECheck or through ACH, which are rejected by the bank for insufficient funds, incur a \$25 “NSF” fee.
- Payments should be made to the lock box at: **Anthem Community Council | PO BOX 65464 | Phoenix, AZ 85082-5464**
All payments should be accompanied by the payment coupon, which is either mailed or emailed to owners of record. Checks, whether a bank check, personal check or third-party check, MUST include either an ACC account number and/or the Anthem property address on the face of the check. Without this information, payments could be subject to delay or unposted charges.

HOW REALTORS AND TITLE COMPANIES CAN OBTAIN RESALE PACKAGES

- Parties interested in ordering either Refinancing Packages, PUD Questionnaires, or Resale Disclosure Packages should first visit the Anthem website at *OnlineAtAnthem.com*.
- On the main page of the community website, select the icon labeled “Disclosure and Title Requests.”
- Read the instructions on the next page that appears, and fill in the electronic form to order the information desired.
- Please note that the Anthem Community Council does not take orders for Resale or Refinancing packages by telephone or by email. Please use our website for all **new orders** for packages as well as for **updates** to existing packages.

RESALES WITHIN THE ANTHEM COUNTRY CLUB HOA

- Under Anthem’s governing documents, property owners within the ACCCA (Anthem Country Club Community Association) are obligated to also be social members of the Anthem Golf and Country Club (AGCC), a third-party, privately owned company that owns and manages the golf courses and amenities physically located within the property of the ACCCA HOA. When a property transitions, Title Companies and Realtors should also contact the AGCC for a Resale Document, **which will identify any charges owed by the seller, as well as transfer fees and prepaid dues, which are the buyer’s obligation.**
- Effective October 1, 2018, the Board of Directors of the ACCCA voted to implement a Lifestyle Enhancement Fee (LEF), which is calculated as $\frac{1}{4}$ of 1% of the Gross Selling Price of the residential property. The LEF is in addition to the Anthem Community Council’s Enhancement Fee. Both the LEF and the Enhancement Fee are collected at time of close of escrow by the TITLE Company on behalf of the Anthem community.

ANTHEM “ACH” DIRECT DEBIT PROGRAM FOR PAYING ASSESSMENTS MONTHLY

- The Anthem Community Council offers to property owners the ability to pay their assessments on a monthly basis through its “ACH” Direct Debit Program. This is the **ONLY** authorized means of paying assessments monthly.
- To obtain an application for ACH Direct Debit, please do the following: (a) Visit the community website at **OnlineAtAnthem.com**; (b) Click on the button on the homepage titled “Pay & View Assessments”; (c) Download and print out the ACH Application form; (d) Fill out and sign the ACH application form and send it, and a voided check, to us at *AR@anthemcouncil.com*.
- Owners remain in the ACH until either (a) they elect to discontinue their participation by sending a termination email to *AR@anthemcouncil.com* or (b) When an ACH is withdrawn from the owner’s account, the withdrawal fails as a result of insufficient funds in the account. If participation in the ACH program is terminated by either (a) or (b), an owner, once they have brought their account balance current, can then reapply to Anthem to re-join the ACH program.

ANTHEM “OPT IN” FOR RECEIVING QUARTERLY STATEMENTS VIA EMAIL

- The Anthem Community Council offers to property owners the option to receive their quarterly assessment and balances due statements by either regular US Mail or by email. The ACC strongly encourages receiving documents via email as it removes any potential delivery issues, for which the ACC is **NOT RESPONSIBLE**. To participate in the email program, please send an email to *accounting@anthemcouncil.com* and indicate you wish to “OPT IN” for email delivery. Provide your name, property address, telephone number and up to three (3) email addresses to where the documents can be emailed.
- Quarterly assessments are due on **January 1, April 1, July 1 and October 1** of each calendar year, paying in advance.
- Emailed statements are usually delivered to property owners approximately 45 days prior to due date. Statements mailed via US Postal Service are usually delivered to property owners approximately 30 days prior to the due date.