



Surfside IV Condominiums
 c/o The HOA Election Guys, Inc
 27472 Portola Pkwy #205-412
 Foothill Ranch, CA 92610

Alison Arnold
 Lordon Management
 1100 Flynn Road Suite 204
 Camarillo, CA 93012

DO NOT DISCARD THIS PAGE

The perforated stub at the bottom will need to be signed and returned with your ballot.

In addition to this notice, this package contains the following:

1. One Official Ballot
2. One double-window envelope
3. One smaller Secret Ballot envelope
4. Three double-sided pages of candidate statements

Please note: The candidates are solely responsible for the content in their statements, neither the Association, nor the Inspector of Elections have redacted or edited any of the content in the statements enclosed in this election package

October 11, 2024

A Meeting of the Members will be held as follows:

Date: November 16, 2024
 Time: The meeting starts at 11:00 AM. Polls will close at 12:30 PM
 Location: The Pelican Club
 All ballots should be received by us by 12:30 PM on November 16, 2024 when polls close.

This Meeting of the Members is being held to vote on the election of TWO (2) directors. A vote on IRS Revenue Ruling 70-604 will also take place to address potential excess funds and reduce tax liabilities.

For the election to be held, a quorum of the membership must return a ballot, or attend the meeting.

The Surfside IV Condominiums bylaws define a quorum as “51%” of the voting power of the association, or 108 members. This quorum requirement is lowered to 20% (43 members) at a reconvened meeting. If quorum is not reached at any meeting, the members in attendance at the meeting may vote to either (a) reconvene the meeting to a later date, or (b) close the meeting without reconvening, meaning no election will take place (this is done via a voice vote of the homeowners present at the meeting). If a meeting is reconvened the deadline for receiving ballots will be extended as well. Please return your ballot so that we can meet quorum!

If you have any questions, please do not hesitate to contact your association’s Inspector of Elections. The HOA Election Guys, Inc can be reached at (888) 380-3332 or by email at info@thehoaelectionguys.com

Detach along perforated line and place this stub in the provided window envelope.
 Please make sure that the addresses are showing through the windows.

OWNER SIGN ABOVE (only one owner’s signature is required) **Signature must show through window or ballot will not be counted!**

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Instructions:

- 1) Cast your vote(s) on the enclosed ballot.
- 2) Insert ballot into the smaller Secret Ballot envelope.
- 3) Insert the sealed Secret Ballot envelope into the window envelope.
- 4) Sign this stub in the left corner (**your ballot will not be counted if you do not sign this stub**)
- 5) Detach and insert this stub into the window envelope, making sure your signature and the addresses are showing through the windows.
- 6) Mail your ballot
 (if not provided, make sure you apply postage!)

CANDIDATE STATEMENTS
(Additional statements on reverse)

Karin Charlton, 778 Island View Circle

I've lived in Surfside IV for over 18 years, and I'm thankful that I've had the opportunity to put in the hard work to maintain the safety and infrastructure of our beautiful community. I have served on the board for a total of 6 years including the last 4 years consecutively. I can say, without fail, that I provide homeowners with fair representation in all areas. I also keep a watchful eye on our finances and expenses to make sure our money is safe. Currently, our reserves and operating capital are at an almost 10-Year high, as we continue to make much needed improvements around our 40+-year-old community.

I have office hours every Saturday at the Pelican Club where I maintain the parking system by providing homeowners with gate remotes, and FOBS to enter the Clubhouse, etc. I bring with me a built-in history of our community and knowledge of boards from the past, coupled with an encyclopedic knowledge of our CC&R's as well as our rules and regulations. I know the inner workings of the HOA, the management company, and I know a lot of homeowners on a first name basis. Surfside IV is my FULL-TIME residence. I firmly believe we need board members who live on site full time. We have 211 units and 11 acres; we need eyes and ears on the property as we have no full-time manager on site and our management company cannot possibly stay aware of what's going on day to day. We need engaged board members on the ground at Surfside IV. Here's a little more about me:

- Retired in 2016, having worked as a project manager for 25 years for Hewlett Packard –HP –
- Served 3 times as a board member of the SSIV Board, as member at-large and as treasure
- Served as the Landscape Committee Chair for four years
- Served as Rules Committee Chair for 11 years
- Served as Architectural Committee Chair for three years

I stand on my integrity and my commitment to SSIV, and that coupled with my professional background, and my board experience will enable me to continue to work with other board members and homeowners to make the right decisions for Surfside IV.

I appreciate your support and votes as we continue to move forward.

Karin Charlton

CANDIDATE STATEMENTS
(Additional statements on reverse)

Nadine Chesnut

My name is Nadine Chesnut and I am a retired attorney. My family has been a part of the Surfside IV community for over 40 years. My parents passed away and I am now the sole owner of my condo. My parents were always very involved with our Surfside community, being board members years ago. I would like to also serve on the board to insure our beautiful community maintains high standards of maintenance and fiscal responsibility. I have attended board meetings in the past and have experience in dealing with our Board and Management company on various issues.

I would like to simplify and expedite owners requests to the Management company. I believe owners concerns should be addressed promptly and fairly. I am concerned about and want to maintain property values, as do all owners. Costs of needed repairs and projects must be carefully evaluated and resolved in the most cost effective way, but also utilizing the highest standards.

I am very concerned about the high cost of monthly dues as well as the huge deficit in reserves last reported by the present board. Reviewing and analyzing these critical issues is my top priority. I believe I can represent our owners with integrity and make a positive contribution if allowed to serve on the board.

CANDIDATE STATEMENTS
(Additional statements on reverse)

James Gilbert

Candidacy Statement for HOA Board of Directors

Dear Homeowners,

My name is James Gilbert, and I am honored to put forth my candidacy for the HOA Board of Directors. Over the past months, many of you have seen me regularly attend our board meetings. I've taken the time to listen carefully to your concerns, engage in meaningful discussions, and understand the unique challenges our community faces. My deep commitment to this community drives me to seek a position on the board, where I believe I can contribute to the positive and sustainable growth of our neighborhood.

One of my primary goals as a board member will be to provide affordable and effective solutions to the common issues that many of us have encountered. I firmly believe that a balanced approach to problem-solving—one that takes into account both immediate needs and long-term sustainability—is key to enhancing the quality of life in our community. By fostering an environment of transparency and clear communication, I aim to ensure that all residents are well-informed and confident in the board's decisions.

Currently, I am serving as a member of the Oversight Committee, where my responsibilities include reviewing and selecting bids for various projects. This role has provided me with valuable insights into the allocation of our community's resources, ensuring that funds are used effectively and responsibly for special projects. My experience in this capacity has reinforced my commitment to fiscal responsibility and careful stewardship of our community's assets.

In addition to my work on the Oversight Committee, I bring a wealth of experience from my professional background. I have worked extensively in public works for the city of Oxnard, where I was involved in numerous projects that required a keen understanding of infrastructure and community planning. My experience with the Carpinteria Valley Water District further honed my skills in managing critical resources and ensuring that essential services are delivered efficiently and effectively. Moreover, my career in the payment processing industry has equipped me with the expertise to navigate complex financial systems, manage budgets, and implement solutions that are both innovative and cost-effective.

I am passionate about bringing a positive and collaborative energy to the board. I believe that by working together, we can create an environment where all voices are heard, and all ideas are considered. My approach is rooted in a desire to build consensus and to achieve results that reflect the collective will of our community.

I am confident that my experience, dedication, and commitment to transparency will make me a valuable asset to the board. I look forward to the opportunity to serve and to contribute to the continued improvement of our community.

Thank you for your consideration and support.

Sincerely,
James Gilbert

CANDIDATE STATEMENTS
(Additional statements on reverse)

Karl Shafer

Vision:

Committed to fostering financial transparency, promoting an HOA portal-friendly environment, and empowering members with an active voice to build a community where every individual is informed, engaged, and valued.

Background:

Holy Trinity Lutheran Church Board Member

Thousand Oaks High School Football Boosters Board

Youth Football Coach - Conejo Valley

Restaurant Operating Partner - Managed Annual budget of 8 million and Supervised over 200 employees

Managed internal and financial audits, monthly profit & loss statements, workman's compensation and human resources.

Coordinated vendors for all maintenance internally and externally for two separate 12,000 ft. buildings and landscape grounds

Finance- Mortgage Broker

Licensed Realtor in Ventura County

Ventura County Homeless Shelter Volunteer

Karl has a strong family foundation and dedication to compassion and service in the community. He has been married for 34 years to Amy who works as a hospice social worker. They have two children: Summer who serves as a San Diego County Public Defender, and Drake who works as an emergency room MD in the Inland Empire.

CANDIDATE STATEMENTS
(Additional statements on reverse)

Richard Upshaw

Fiscal Conservative who believes in Transparency

Background includes:

Former San Bernadino County Deputy- medically retired

24 year Educator, retired in 2023

Last 10 years as a Middle School Principal

Former School Board Member

School Site Council Member

Little League Board Member

Managed Annual budgets of 3 million and Supervision for 80 employees

Bob Grigg

I've been an owner at Surfside IV for 36 years; lived here for 38 years.

In the 1990s I was a member at large on the board for one year, treasurer for seven years, and after a one year break, I was president for one year.

As treasurer, I gave reports that showed owners how much different items cost per unit, on a per month and per year basis. I guided the board to increase income for coming expenditures, so that when they came, we had the money and we did them without a lot of drama and distraction.

As President I spearheaded getting rid of the human monitors that were continuously in the clubhouse when it was open. I oversaw the repair of all the flat roofs, at a much reduced price, because we had the money in the bank and we were able to negotiate immediately.

When I left, we had over \$1 million in reserves. I think reserves were about 50% at that point.

1960s: In high school I used to fall asleep doing math problems with a slide rule for fun.

1970s: I achieved a four year degree with a triple major in math, psychology, and sociology.

My first job was as the credit manager at a nationwide department store chain. I left after one year because I would not go along with the "cooking the books" system that they had, that increased everybody's pay. Six years later, the company went bankrupt when the fraud was discovered.

Early 1980s: President of an HOA in Port Hueneme, about half the size of Surfside IV for 2.5 years, while I was a renter. I did it because I enjoy solving problems.

1980-2000: Efficiency expert for a computer facility. I was to a "go to man" when things went wrong.

1990s: Union representative for 10 years.

2003: Took an early retirement when a sleep doctor determined that I should not report to work before 1:15 pm. i.e. I don't do morning meetings.

In 2012 I developed a sensitivity to Wi-Fi and magnetic radiation, which caused an electrical part of my heart to fail in March of this year. I now I have two pacemakers. Before my current recovery and my recovery from a car accident I had in 2017, I could not think of being on the board. That has now changed.

I believe that boards have a tendency to not want to be responsible for raising the dues, that would cause someone to have to sell their unit. They would much rather put things off, until something becomes very obvious, and then have a special assessment. That way, when someone has to move because of the special assessment, it wasn't because of their vote, it was because of the vote of all the neighbors. Of course, things are not being done at the most opportune moment, so the actual amount of money involved is now greater. There's also a large "opportunity cost" because, as we have seen recently, we have spent about half of our time the last year, dealing with the special assessment, instead of getting on with the business of the association. We need to not burden the volunteer HOA board members with any extra duties that do not have to be done. Their pay is zero and we want them to spend the hours that they do on necessary matters,.

I believe that recordings of HOA board meetings should be allowed. So many times I have seen things decided at the board meeting, and then someone will say: "that didn't happen", and minutes will not reflect what really happened.

Some "Roberts Rules of Order" committees are appropriate. It is also appropriate for groups of homeowners to get together on their own, and send advisory notes and reports to the board on what they think should be done on different things.

I believe the CC&Rs should be redone to bring them up-to-date with current state and federal laws in a readable manner with no changes. This will obviously pass the 75% vote criteria. Then, committees should be formed, to try and figure out how we want to modify, the now readable text, to the current situation, 45 years later than when it was originally written. Online surveys should be done of the proposed changes to figure out what to finally put to a vote.

Management companies have an incentive to have an internal historical record that is not easily transferred to a new management company. We need to force the management company to use a system that we can take with us when we go to a new management company, which we inevitably will. This way, our history will not be lost, as it has been continuously over the years. This information will allow us to make better decisions and not have to redo decisions that have already been made and thought about.