



# Heritage Bay Golf and Country Club

## MASTER ASSOCIATION

### Transfer of Membership Procedures

*(Transfer privileges are only available to owners who are in good standing and current with their HOA and Club accounts.)*

\*30-Days Prior to a Transfer of Membership, Heritage Bay must be in receipt of:

- Completed membership transfer form and transfer fee
- Lease approval from sub association management company

#### **HERITAGE BAY TRANSFER OF MEMBERSHIP FORM**

- Always use the most updated form found on the Heritage Bay public website, [www.golfheritagebay.com](http://www.golfheritagebay.com) (do not login), on the REAL ESTATE tab. (Please do not use old forms)
- Please ensure everything is filled in correctly and legibly.

**It is mandatory that The Transfer of Membership Form be signed by the owner or agent with power of attorney, confirming that the member knows their privileges will be suspended for the period of time indicated on the form. Without this signature the transfer cannot be processed!**

- Transferee Information
  - The transferee must have a valid e-mail address entered on the form for us to contact him/her.
  - Rental agreements and transfer dates must be no less than **30 consecutive days**.
- Please submit only the information required on the form.
  - Any additional information should be on a separate sheet of paper.
- Only the names of persons who qualify for membership transfer are to be entered on the transfer form; no guests, blood relatives or occasional visitors.
  - *Please refer to the Certificate of Amendment to the Amended and Restated Declaration of Covenants, etc., signed 3/23/09 and recorded 4/1/09 ([Click Here](#))*
  - *Please refer to pages 5-7 of the Rules & Regulations, approved 4/21/16 ([Click Here](#))*

**\*Please note: Incomplete, incorrect and illegible Transfer Forms will not be processed and will delay the transfer.**

### WHEN TO SUBMIT THE TRANSFER FORM

- The admin office must receive the completed transfer form and fee together at least **30 days in advance** of Transferee's starting date.
- You can submit the transfer form and fee months in advance.
  - Transfer fees are non-refundable.
  - Check or money order is the only accepted form of payment!
- The membership Transfer form and fee must both be received prior to processing.
- Every effort will be made to expedite transfers that arrive less than 30-days prior to the transferee starting date; however, no guarantee is made that the transfer member will be able to start their privileges on the transferee starting date, especially during the height of season. Transfer members with completed forms and payments will be processed on a "first come, first served" basis.

### TRANSFER DATE CHANGES

- Only the owner of the property or his/her agent with power of attorney can make a one-time change to the transfer dates in writing.
  - Transferees cannot make changes to their transfer dates.
- Written changes are to be made not less than one week prior to the new arrival date.

### HOW WILL THE TRANSFER MEMBER KNOW THAT THE TRANSFER HAS BEEN PROCESSED?

- Transfer members will be sent **two** e-mails from the Administration Office.
  - **First e-mail:** a confirmation that the transfer form and fee have been received and processed.
  - **Second e-mail:** A welcome letter inviting Transfer Member to come into the office on the date indicated on the letter to have pictures taken for ID cards, sign any additional paper work and to join in a group orientation.

***Transfer members should not come into the office until they receive this welcome e-mail.***

### APPROVAL TO LEASE FROM THE SUB ASSOCIATION

- An approval from the housing unit's Management Company is **mandatory** to finalize a membership transfer.
  - This includes family members, non-rent paying guests and renters who have previously rented.
- Contact the Management Company for the forms needed to process the approval from the Sub-Association. *(Please do not contact Heritage Bay Administration Office about this approval. It is the responsibility of the Sub-Association.)*

### GATE ACCESS

- It is the owner's responsibility to inform the gate of the names of their renters and their dates of occupancy.

- Entering names in **Visitor's Management** in the "Quick Links" section on the Member's portion of the website is the most preferred way.

**Please Note:** *The Gatehouse Information Form has been discontinued and no longer accepted.*

#### **ID NUMBERS AND CARDS**

- Do not give your membership number or your ID cards to your transferees.  
**This is an ID card violation.**
- The Transfer member will receive their own member number and ID cards.
- When the Transfer Member uses their number in the dining facilities, the Food and Beverage amount will be deducted from the member's F&B minimum.

#### **WHAT OWNERS SHOULD TELL RENTERS PRIOR TO ARRIVAL**

- Directions on where the property is located from the gate house entrance.
- How to obtain keys to the property or the codes and what to do if they lose their keys.
- Who to call if something doesn't work or they need assistance is operating appliances.
- Review the Rules and Regulations set forth on the REAL ESTATE tab on the Heritage Bay public *website* because they are obligated to comply with them.

**Please note:** *Neither the Administration office nor the Gatehouse has keys to any housing units or information regarding appliances or issues that arise inside the housing units.*

#### **Frequently asked questions from Renters about the property they will be occupying:**

1. Instructions on how to use the remote controls for your electronic devices and appliances.
2. Who to call about Water, Electric and TV issues.
3. Instructions on how to regulate the climate controls
4. Location of trash bins or dumpster
5. Schedule of trash and recycling days
6. Wi-Fi password (if applicable) for your property
7. Location of water valves
8. Who to contact if something occurs in your home that needs immediate attention
9. Location of mail boxes and the mail box keys
10. Parking and locations for guest parking
11. Your recommendations on your favorite beauty salons, restaurants, etc.