

JEPOA 03/07/2026 Board of Directors Meeting Minutes

Location: 1028 Julian Estates Road

Participants Present:

Board Members: Charlie Linch, Steve Spooner (by telephone), Nick Szeverenyi
Officers: Eric Raimo (President), Marianne Rochester (Treasurer), Karen Wolfred (Secretary)
JEPOA Members: Valerie Edinger, Jim McNally, Jill Raugewitz, Eric Smith, Ken Peterson

1. Meeting called to order at 10:13 AM. Quorum with all Board Members present. Additions to the agenda added under New Business: Ken Peterson request
2. JEPOA 12/13/2025 Board Meeting Minutes
Meeting minutes were previously distributed to the Board via email, unanimously approved via email correspondence, and posted on the JEPOA website.
3. Treasurer's Report – Marianne Rochester
The following reports were presented: Balance Sheet as of 2/9/2026, Profit and Loss as of 2/9/2026, and Profit and Loss Comparison July 1 – February 9 for 2025 and 2026.

All 2025/2026 annual dues are now paid. Prior collection action paid in full.

JEPOA Federal and State taxes have been paid. JEPOA is required to pay 30% federal tax on our CD / investment interest. Our CD and high yield money market accounts earn approximately 4% interest. Prior to our next Board meeting, Marianne will transfer some funds from CHASE checking account to CD(s) for higher interest rate.

4. Committee Updates

a. Road Committee and Roadside Maintenance - Jim McNally

Eric Smith and Jill Raugewitz will be assuming the volunteer roadside and gate maintenance duties previously handled by Rick Coates as a member of the Road Committee and at no cost to JEPOA. Duties include overseeing operation and maintenance of the main gate on Highway 79, snow removal, and coordination of hiring roadside weed whacking personnel.

Jim presented a draft agreement between JEPOA and Eric Smith to perform road cleaning and drain clean-out services (separate from the volunteer roadside and gate maintenance activities listed in the paragraph above). Motion made (Nick), seconded (Steve), to authorize the President to sign the final agreement on behalf of the JEPOA with the following modifications: scope to reflect keeping roads cleaned up all year long and termination clause for both parties. Motion was approved unanimously.

Eric Smith will submit a bid to the Road Committee to paint the main gate at Highway 79.

- b. Fire / Fuel Break / Safety Committee – Nick Szeverenyi
Property owners are reminded to keep dead trees and brush clear 50 feet from the road edge (per JE Bylaws).
- c. Website – Nick Szeverenyi
Owners are reminded to send Nick any ideas on how to improve the website.
- d. Daffodil Planting Committee – Nick Szeverenyi
Another 500 bulbs were planted in November 2025.

5. Continued Action Items

- a. Lot 32 Request for Approval of Metal Roof – Eric Raimo presented a draft letter for Lot 32 confirming that JEPOA has no Architectural Review Committee and that authority for such is referred to the Julian Architectural Committee and San Diego County Planning and Zoning Department. Motion made (Charlie), seconded (Nick), to authorize the President to approve the letter as written. Motion was approved unanimously.
- b. 2026 Officer and Board Director Election – Eric will be sending out the first notice and request for candidate applications no later than March 13. Eric requested that we explore the possibility of using electronic balloting in the future.
- c. 2026 Annual Meeting July 11, 2026 – Eric will contact the Julian Library re availability. Eric and Marianne will coordinate regarding after meeting gathering at either the Library or Nick and Marianne's home.
- d. JEPOA Owner Text Group (Eric Raimo) – Due to costs and logistics, this does not appear practical at this time. No future action required at this time.

6. New Business

- a. Ken Peterson presented material describing the fire pit located on Lot 36 which was constructed over 8 years ago, is propane burning and plumbed from the adjacent house. The house is for sale and Ken wants to confirm that the new owner would be able to use the fire pit without restrictions. Eric R. and the Board asked that Ken submit a written request to the Board for consideration.

Ken also requested that a JEPOA representative speak with Heise Park rangers regarding fire safety and control at the campsites. Eric Raimo will follow up with the Heise Park Ranger.
- b. Karen and Marianne will prepare the annual update of the JEPOA Annual Budget and Policy Statement Report and distribute it in order to be addressed at the next Board Meeting.

7. Other Discussion - none

8. Next Board Meeting: June 27, 2026, at 10 AM at 1028 Julian Estates Road

9. Adjournment: Meeting was adjourned at 11:29 AM.

Profit and Loss Comparison
Julian Estates Property Owner's Association
 July 1, 2025-February 9, 2026

DISTRIBUTION ACCOUNT	TOTAL	
	JUL 1 2025 - FEB 9 2026	JUL 1 2024 - FEB 9 2025 (PY)
Road Repair Project		\$218,179.88
Road repair-repair	9,236.00	120.00
Road-consulting		10,450.00
Total for Road Repair Project	\$9,236.00	\$228,749.88
Taxes		
California Income Tax	200.00	824.67
IRS Tax amount	1,700.00	1,069.00
CA S1-100 Filing Fee		35.00
Total for Taxes	\$1,900.00	\$1,928.67
Weed Control & Abatement	1,750.00	3,420.00
Books, Subscriptions, Reference		121.05
Operations		536.38
Postage, Mailing Service		27.20
Total for Expenses	\$19,098.00	\$244,349.98
Net Operating Income	\$89,202.54	-\$141,996.28
Other Income		
Other Expenses		
Net Other Income		
Net Income	\$89,202.54	-\$141,996.28

Profit and Loss Comparison
Julian Estates Property Owner's Association
July 1, 2025-February 9, 2026

DISTRIBUTION ACCOUNT	TOTAL	
	JUL 1 2025 - FEB 9 2026	JUL 1 2024 - FEB 9 2025 (PY)
Income		
Assessment		
Assessments 2025-2026	100,000.00	
Total for Assessment	\$100,000.00	
Assoc Assessment		
2024-2025 Assessment	2,500.00	98,375.00
Total for Assoc Assessment	\$2,500.00	\$98,375.00
Interest Income	394.74	191.33
Investments		
Interest-Savings, Short-term CD	4,155.80	3,161.22
Total for Investments	\$4,155.80	\$3,161.22
Miscellaneous Revenue	500.00	70.00
Payment Penalty	750.00	500.00
Federal Tax Refund		6.15
Transfer fee		50.00
Total for Income	\$108,300.54	\$102,353.70
Cost of Goods Sold		
Gross Profit	\$108,300.54	\$102,353.70
Expenses		
Accounting Fees	266.00	240.00
Accounting/Tax Preparation Fees	1,200.00	765.00
Bank Service Charge	35.00	105.00
Emergency Gate Repair	798.00	
Facilities and Equipment		
Property Insurance	500.00	
Total for Facilities and Equipment	\$500.00	
Insurance - Liability, D and O	1,050.00	975.00
Legal		
Legal fees - Collection Work	-1,545.00	
Legal Fees - General		1,085.00
Legal Fees-Paving		2,365.00
Total for Legal	-\$1,545.00	\$3,450.00
Main Gate Maintenance	326.00	326.00
Main Gate Repair	426.00	622.00
Other Types of Expenses	206.00	3,083.80
Road Maintenance	2,950.00	

Profit and Loss

Julian Estates Property Owner's Association

July 1, 2025-February 9, 2026

DISTRIBUTION ACCOUNT	TOTAL
Income	
Assessment	
Assessments 2025-2026	100,000.00
Total for Assessment	\$100,000.00
Assoc Assessment	
2024-2025 Assessment	2,500.00
Total for Assoc Assessment	\$2,500.00
Interest Income	394.74
Investments	
Interest-Savings, Short-term CD	4,155.80
Total for Investments	\$4,155.80
Miscellaneous Revenue	500.00
Payment Penalty	750.00
Total for Income	\$108,300.54
Gross Profit	\$108,300.54
Expenses	
Accounting Fees	266.00
Accounting/Tax Preparation Fees	1,200.00
Bank Service Charge	35.00
Emergency Gate Repair	798.00
Facilities and Equipment	
Property Insurance	500.00
Total for Facilities and Equipment	\$500.00
Insurance - Liability, D and O	1,050.00
Legal	
Legal fees - Collection Work	-1,545.00
Total for Legal	-\$1,545.00
Main Gate Maintenance	326.00
Main Gate Repair	426.00
Other Types of Expenses	206.00
Road Maintenance	2,950.00
Road Repair Project	
Road repair-repair	9,236.00
Total for Road Repair Project	\$9,236.00
Taxes	
California Income Tax	200.00
IRS Tax amount	1,700.00
Total for Taxes	\$1,900.00
Weed Control & Abatement	1,750.00
Total for Expenses	\$19,098.00
Net Operating Income	\$89,202.54
Net Other Income	
Net Income	\$89,202.54

Balance Sheet

Julian Estates Property Owner's Association

As of February 9, 2026

DISTRIBUTION ACCOUNT	TOTAL
Assets	
Current Assets	
Bank Accounts	
Chase Checking	108,701.66
CNB - Brokerage (4301)	209,559.24
CNB - Checking	4,825.83
CNB - Money Market	5,097.32
Community Valley Bank Savings	14.00
Total for Bank Accounts	\$328,198.05
Other Current Assets	
Transfer of money	-5,012.70
Total for Other Current Assets	-\$5,012.70
Total for Current Assets	\$323,185.35
Fixed Assets	
Gate System- (Purch. 2000)	6,885.00
Total for Fixed Assets	\$6,885.00
Total for Assets	\$330,070.35
Liabilities and Equity	
Liabilities	
Total for Liabilities	
Equity	
Current Year Increase(Decrease)	0.00
Fund Balance - Begin. OF YR.	0.00
Opening Balance Equity	-883.43
Unrestricted Net Assets	241,751.24
Net Income	89,202.54
Total for Equity	\$330,070.35
Total for Liabilities and Equity	\$330,070.35

Julian Estates Property Owners Association (JEPOA)

PO Box 339

Julian, CA 92036

jepoapresident20252026@gmail.com

March 7, 2026

To whom it may concern:

I am writing on behalf of two property owners in our community, Eric Smith and Jill Raugewitz. They attended the JEPOA Board Meeting of 9/27//2025. Their request for standing seam metal roofing for their new construction domicile(s) was discussed. The JEPOA has no Architectural Committee. Eric and Jill were referred to the Julian Architectural Committee and then to the San Diego County Planning and Zoning Department during the permit process for approval of their request.

Feel free to email me with any questions about this matter.

Sincerely,

A handwritten signature in black ink, appearing to read "Eric Raimo".

Eric Raimo

JEPOA President

Ken Peterson Email Message and Photos

From: Karen Wolfred (k_wolfred@yahoo.com)

To: nick@szeverenyi.com; steve.spooner@spoonerwoodworks.com;
linch@artifexwest.com; jepoa20252026@gmail.com;
rochester5024@gmail.com

Date: Wednesday, March 4, 2026 at 11:56 AM PST

----- Forwarded Message -----

From: Ken Peterson <kenptrson@yahoo.com>

To: "k_wolfred@yahoo.com" <k_wolfred@yahoo.com>

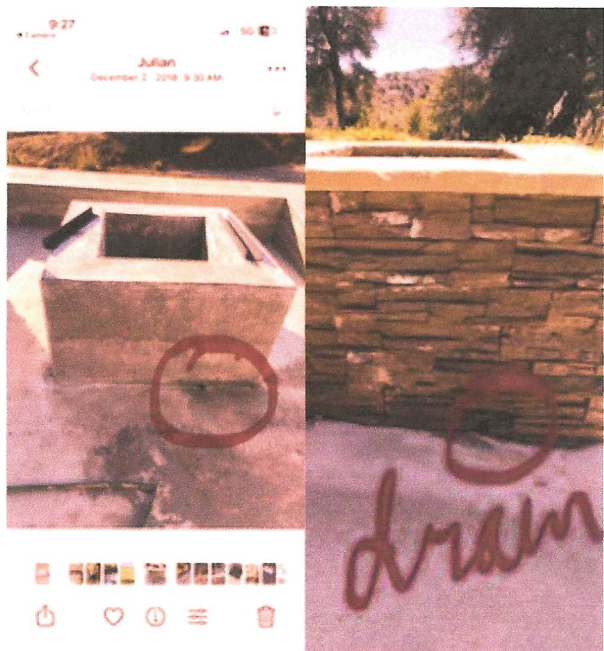
Sent: Monday, March 2, 2026 at 03:54:11 PM PST

Subject: HOA fire pit issue

Hello Karen I won't make 3/7 HOA meeting but if you can add to the agenda the issue I talked to you about regarding the fire pit that was constructed at my property I would appreciate it. This pit was constructed with the purpose of evening enjoyment and is plumbed into home propane and is properly ventilated and is controlled by a valve no different than an outdoor bar b que. There's is no smoldering or threat of wind blown embers as the pit is filled with lava rock. I understand what initiated the reaction of the board to the properties purchases in the past that precipitated their reaction and agree with it but we also live in an environment especially myself and don't condone the fact that within 200' of the park and open wood burning pits are allowed to burn all night. I accept the fact that we have no control of what the park does nor want to I'm only informing the board of the safeguards that I have employed and want to have reconsideration that each fire pit construction isn't the same. Please review photos of effort made and additional remedial actions that can be made that makes my fire pit no different than a bar b que. Let's not make every action painted with a broad brush.

Thank you

Ken Peterson



Ken Peterson





Sent from my iPhone