

# Portillo Ridge Homeowners' Association

P.O. 37020, Tucson, AZ 85704

Website: [www.portilloridgehoa.org](http://www.portilloridgehoa.org) ~ Email: [portilloridgehoa@yahoo.com](mailto:portilloridgehoa@yahoo.com)

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## Board of Directors Workshop January 15, 2021

**Board Members Present:** Jim Chisholm, President, Wendy Strasser, Secretary, Dave Colicchio, Vice President and Mike Lewis, Treasurer

**Homeowners Present:** One (1)

**Call to Order:** The BOD Workshop was called to order at 8:30 AM

### Discussion Topics:

- Review of Duties/Responsibility Chart.
  - ✓ Add Waste Management Representative
- Tax Status Update-Mike Lewis
  - ✓ Spoke with Steve Bosse, tax attorney who indicated that since Portillo Ridge maintains the arroyos on the property to maintain downstream communities could qualify the association to receive tax exempt status. The below listed items will need to be provided to Mr. Bosse:
    - Create budgets for 2021, 2022 and 2023.
    - Photographs of the arroyos.
    - Articles of Incorporation and By-Laws.
    - 2019 taxes.
    - Mission Statement to be posted on the website (and to include “protecting from flash flooding”)
  - ✓ Estimate cost for preparing the documents and submission to the IRS is \$1,600.
  - ✓ Stratford Management to notify the CPA regarding the Association’s applying for tax exempt status and will this affect the 2020 taxes.

**No other business related to the Portillo Ridge Homeowners' Association was discussed or acted on during this Portillo Ridge HOA BOD Workshop.**

**Adjournment:** The workshop was adjourned at 9:25 AM.

Respectfully submitted,

*Helen B Brown*

Helen B Brown, CMCA  
Director of Management Services/Community Manager-Stratford Management  
For the Portillo Ridge Homeowners Association Board of Directors

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