

CARLSON'S RIDGE HOMEOWNER'S ASSOCIATION, INC.
C/O REI Property Management, Inc.

October 22nd, 2025

Carlson's Ridge Homeowner's Association
Carlson's Ridge
New Milford, CT 06776

Dear Homeowner,

During the Annual Owner's Meeting conducted on October 16th, 2025, the 2026 budget was ratified.

Resources included in this packet include the Ratified 2026 budget, unapproved Annual Meeting Minutes, Maintenance Responsibilities and Reminders, scheduled Board Meetings for 2026, REI contact information, hours, and Holidays, and Trash Holidays.

You should receive a coupon booklet in the mail by mid-December. If you do not receive it by then, please reach out to cleblanc@rei-pm.net and we will look into it. Please be advised that auto payments will not change automatically. You will need to go into your account and manually adjust your HOA payments \$10.

On behalf of REI Property Management and the Board of Directors, we hope you have a safe and Happy Holiday Season.

Sincerely,

Courtney Leblanc

Courtney Leblanc
Assistant Property Manager
REI Property & Asset Management, Inc.
cleblanc@rei-pm.net

Carlson's Ridge

Annual Board Meeting

Agenda October 16, 2025 at 3:30pm

John Pettibone Community Center (2 Pickett Road, New Milford, CT)

OPEN SESSION

Attendance:

Kathy Schatteman, President, Jim Polito, Vice President, Charlene Michalek, Treasurer, Charles Flanagan, Director, Jane Gregory, Director

Bart and Tracey Bradshaw, 4CRC, Lois Snow, 16 CRC, Judy Duda, 21 CRR, John and Teddy Oxtan, 23 CRR, Robert and Antoniette Rainey, 25CRR, Ron and Dixie Travis, 27 CRR, Catherine and Sam DeLuca, 39 CRR, Angie Masini, 71 CRR, Alice Fitzpatrick, 73 CRR, Elaine and Tony Abatamarco, 6 CRW, Joanne Wengler, 12CRW, Ron Michalek, 8CRW.

On behalf of REI: Courtney Leblanc and Lisa Sachen

Call to Order:

The meeting was called to order at 3:34pm.

Proof of notice of meeting:

Kathy Schatteman, President, motioned to approve the proof of motion and Charlene Michalek, Treasurer, seconded the motion. All in favor.

Approval of the minutes:

Kathy Schatteman, President, motioned to approve the proof of motion and Jim Polito, Vice President, seconded the motion. All in favor.

Presidents Report:

-Kathy welcomed the new homeowners to the community. She has spoken with them but has not discussed whether they would have any interest in joining the board.

- Homeowners may receive a letter from REI asking them to address issues found during the fall walkthrough. One common item was faded shutters.

-There is a speeding issue in the community, please be mindful of your speed. Putting up speed traps is too expensive.

-Limited common elements were explained. The HOA could perform all maintenance, repair, and replacement and assess the cost to the homeowner. The HOA can obtain estimates and manage the contractor. Please advise REI of any issues.

Board Elections:

Slate of candidates accepted unanimously by all members present. Jane Gregory was re-elected with a term ending in 2027. Charlene Michalek was re-elected for a term ending in 2028. Judy Duda was elected and will fulfill the remaining 1year term of Vice President.

Budget ratification:

Carlson's Ridge

Annual Board Meeting

Agenda October 16, 2025 at 3:30pm

John Pettibone Community Center (2 Pickett Road, New Milford, CT)

OPEN SESSION

Charlene presented the budget with an increase of \$10. The budget was passed unanimously by all members present.

Excess Profit Assignment:

Excess profit will go into the reserve account. Kathy Schatteman motioned to approve, Charlene Michalek seconded, all in favor.

Unfinished/new business:

-The community thanked Charlie and Jim's service as they retire from the board.

-If there are any other homeowners interested in joining the board, please let us know. New members are needed.

-The community discussed Ralph retiring and the need to find new contractors A gift for Ralph was also discussed. Donations are option and owners can donate as much or as little as they'd like.

- Gutters will be cleaned 1 time per year by the association. They will be cleaned after Thanksgiving. If further cleaning is needed, it will be the homeowner's responsibility.

-Owners asked which driveways are planned for replacement. It is planned that Four Star Paving will do 45-47CRR and 49-51CRR as weather permits. Future road repairs and overlay will be addressed as needed and funded by reserves. It is difficult to find contractors willing to do small communities.

Adjournment: Kathy Schatteman motioned to adjourn at 4:08pm. Charlene Michalek seconded, all in favor.

Carlson Ridge Condominium Association
Approved Budget 2026

Common Charge

\$430.00

\$440.00

	2025 Annual Budget	2025 Projection	2026 Approved Budget
Income			
5110 - Common Charges	\$247,680	\$247,680	\$253,440
5115 - Work Order Recovery	0	858	0
5230 - NSF	0	0	0
8030 - Change in Market Value	0	0	0
5310 - Late Charges	0	300	0
5340 - Reserve Transfer In	20000	11260	0
5350 - Interest Income	0	24	0
5420 - Capital Contribution - Unit Sales	0	2580	0
Total Income	\$267,680	\$262,702	\$253,440
Expenses and Reserve Transfers			
7100 - Late Charge Expense	\$150	\$150	\$180
7110 - Office	2,000	1,318	2,000
7210 - Legal	0	0	0
7220 - Accounting - Tax Preparation	1,280	300	300
7315 - Hydrants	4,150	3,850	4,000
7320 - Electricity	2,200	2,238	2,250
7405 - Insurance	38,290	38,994	37,884
7410 - Management	14,832	14,832	15,275.52
7415 - Trash/Recycling	13,759	13,426	13,937
7420 - Landscaping/Snow	73,473	73,473	75,677
7425 - Lawn Weed & Feed	7,525	7,525	7,525
7509 - Gutter Cleaning	2,100	2,100	2,100
7510 - Tree Trim and Removal	6,000	7,115	7,000
7511 - Power Wash	4,084	4,318	4,288
7512 - Paint and Repair Wooden Trim	1,000	334	0
7513 - Seal/Repair Driveways	2,000	2,000	0
7514 - Roof Repair	2,400	2,400	0
7515 - Misc.: Contributions, etc.	200	100	200
7516 - Landscaping Enhancements	1,500	1,802	1,500
7517 - Unplanned Repairs - Misc.	7,000	9,889	10,000
7730 - Asphalt Work & Driveway Replacement	4,000	11,260	0
7751 - S.P. - Retaining Wall	16,000	0	0
7820 - Long Term Capital	62,112	62,112	68,323
7840 - Derrered Maintainance	1,200	1,200	1,000
7860 - Capital Contribution Transfer	0	2,580	0
Total Expenses and Reserve Transfers	\$267,255	\$263,316	\$253,440
Net Income	\$425	(\$614)	\$0

PROJECTED RESERVE BALANCES 12/31/2025 & 12/31/26

PROJECTED RESERVE BALANCE 12/31/25	
LONG TERM RESERVE (Edward Jones)	190,115.28
SALES	2,580
INTEREST (estimate)	1,726.88
DM RESERVE	5,476.02
DRIVEWAYS	-11,260
TOTAL	188,638.18
PROJECTED RESERVE BALANCE 12/31/2026	
OPENING BALANCE	188,638.18
LONG TERM CONTRIBUTION (Edward Jones)	68,323
DM RESERVE	6,476.02
TOTAL	263,437.20
Plus interest and sales, less any asphalt or roof repairs	

Carlson's Ridge 2026 Meeting Dates

April 16th, 2026 at The John Pettibone Community Center and via TEAMS

June 18th, 2026 at the Gazebo

August 20, 2026 at The John Pettibone Community Center and via TEAMS

October 15th, 2026 at The John Pettibone Community Center and via TEAMS

Carlson's Ridge Homeowners Association, Inc.

c/o REI Property Management, Inc.

December 2023

Association Responsibilities	Homeowner Responsibilities
Roofs	Windows & Doors
Driveways	Shutters
Roads	Vents within Unit (including exterior covers)
Sidewalks	Garage Doors
Vinyl Siding	Decks & Railings
Maintenance of Common Areas	Leaking Pipes, Valves, and Toilets
Landscaping and Snow Removal	Interior Appliance Hoses
Trees	A/C Units
Power Washing (every 2-yrs.)	Electrical Switches and Wiring
Gutter Cleaning (once every yr.)	Underground Pipes
Exterior Pests, Insects or Hives etc.	Hot Water Heaters
Painting of Specific Exterior Areas	Interior Pest or Insects
Foundations	Patios & Porches
	Gutters & Downspouts
	Any items that serve a particular Unit

This is a brief description of some, but not all, maintenance issues. If there is a question on anything, please always feel free to contact REI and ask. If REI is unsure, we can always reach out to the Board to see if they are aware of any historical details etc.

Additional:

1. This property was built in 2003-2005. The maintenance for the items listed under the Associations responsibility are going to increase as the property ages.
2. Hot water heaters over ten years of age, or past the warranty period, whichever comes first, must be replaced by the homeowner. Upon replacement, the homeowner should supply the association with the serial number and a copy of the contractor's bill with the installation date of the water heater.
***Recommendation: An emergency shut off valve should be installed.**
3. Dryer Vents are recommended to be cleaned yearly but the Association requires them to be cleaned every other year and supply the association with proof of completion.
4. Chimney Cleaning for those homeowners who use their fireplace on a regular basis, you should have your CHIMNEY SWEPT EVERY TWO YEARS. If you use your chimney infrequently, and you haven't had it swept in the last five (5) years, you should have it inspected and swept.

2026 REI Holiday Schedule

1 Thursday	January 1	New Year's Day
2 Monday	January 19	Martin Luther King Jr. Day
3 Monday	February 16	Presidents Day
4 Monday	May 25	Memorial Day
5 Saturday	July 4	Independence Day
6 Monday	September 7	Labor Day
7 Thursday	November 26	Thanksgiving Day
8 Friday	November 27	Day after Thanksgiving
9 Friday	December 25	Christmas Day

REI OFFICE HOURS:

M-TH: 9AM-5PM

FRI: 9AM-4PM

SAT. & SUN.: CLOSED

NO OFFICE DROP OFFS, BY APPOINTMENT ONLY

Lisa Sachen- Property Management -lsachen@rei-pm.net – 203-744-8400 ext. 156

Courtney Leblanc- Assistant Property Management-cleblanc@rei-pm.net -203-744-8400 ext.158

TRASH HOLIDAYS:

NEW YEARS DAY: Thursday, January 1st

Memorial Day, Monday, May 25th

Independence Day, Saturday July 4th

Labor Day, Monday, September 7th

Thanksgiving Day, Thursday, November 26th

Christmas Day, Friday, December 25th

Christmas Tree Pick up: Christmas tree pick up dates and costs are not available yet. The information will be shared with the community when received.