

HOA Transition Plan Business Plan Summer/Fall 2025

The Chinquapin LLC (Mark Adkins, developer) has requested **transitioning the HOA** to the **Chinquapin homeowners** and is offering the **purchase of land and amenities** that are currently owned by the Chinquapin LLC. A **Transition Team** was formed to begin the **evaluation**.

Transition Team

Transition Team Members

Since July, this group, with specific expertise, has been meeting to put together an **initial Operating Model** for the **transition of the HOA** to the Chinquapin **owners**.

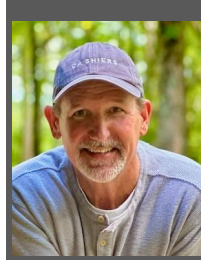
Note: Bios available in appendix



Allen Dobson
Chair



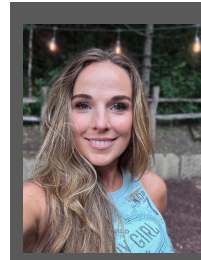
Bill Benner



Brent Walker



Doug Barber



Emma Geisler



Frank Gaston



Kay Lucas



Rich Vietez



Sally Alvis



Tim Wellman

Section 1 - Operating Model

The **Operating Model** is intended to create a **well-organized HOA** that will support Chinquapin in perpetuity regardless of who is on the HOA board. These principles fall into 3 key categories: 1) **Communications**, 2) **Governance**, and 3) **Management**

1

Communication

- Keeping all owners up to date and informed (transparency)
- Providing an owners website with helpful resources (exists today)
- Knowing who to contact for help

2

Governance

- Approving an HOA org to oversee the operations
- Defining approval and decision making processes
- Defining clear operating roles & responsibilities & Standard Op Procedures

3

Management

- Understanding and hiring staff required to operate the HOA and Chinquapin
- Implement Standard Operating Procedures

1 Operating Model Communication

Communication

- Keeping all owners up to date
- Providing a website with helpful resources
- Knowing who to contact for help

Keeping owners up to date

- Welcome package
- Regular HOA board meetings with minutes and opportunity for input
- Quarterly Newsletter (Event calendar, Community news, etc.)
- Awareness alerts for outages and emergencies

Expanded private owners website

- Exclusively for owners
- HOA committee news and reports
- Building requirements (survey requirements, architecture review, etc.)
- Community rules & guidelines
- Exploring new capabilities to monitor building requirements (integration with Google/Office workspaces)

Contact information

- Contact list for all owner needs
- Escalation path and easy reporting process for problems

2 Operating Model Governance

Governance

- Approving an HOA organization to oversee the operations
- Defining approval processes
- Defining clear operating roles & responsibilities

Organization Structure

- Establish Board of Directors, Officers and Committees with clear roles & responsibilities. The board should represent the various interests and areas of Chinquapin There are different **areas** of Chinquapin. 1) **Nature's Walk**, 2) **Double Knob**, 3) **Estates (New Settlers)**, and 4) **Roaming Road (inc. Cow Mountain)** consisting of full-time, part-time, rental, and home/land owners.

Approval Processes

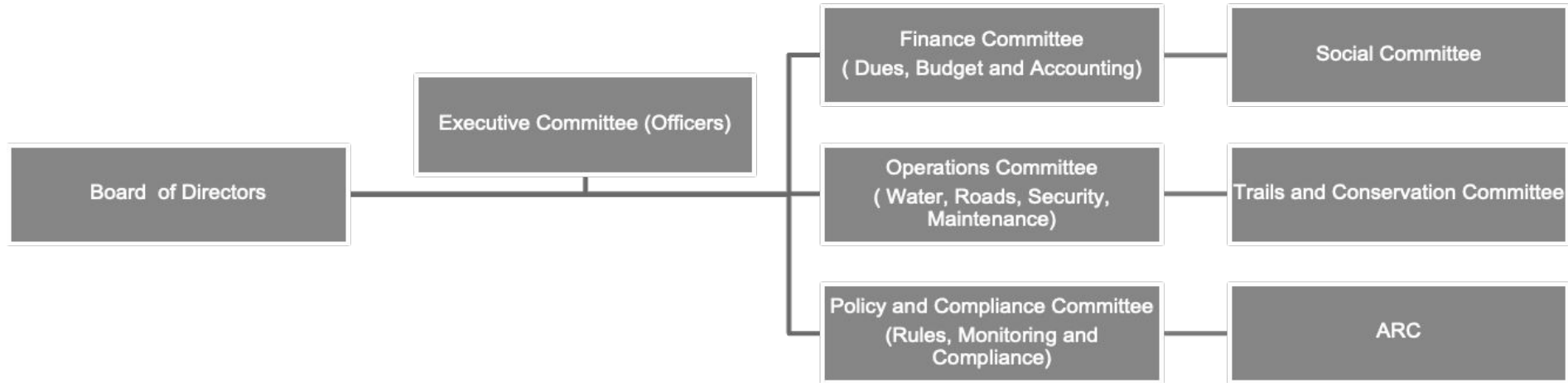
- Developing a list of things that need approval
- Examples.. Tree survey, site plan, water connections, architecture requirements, etc.
- Approval process decision tree

Standard Operating Procedures

- Define clear operating procedures
- List of SOPs we'll create
- List of additional issues that we'll prioritize

2a Operating Model - Governance Organizational Structure

Key points: Nominating slate, balanced HOA board, 2 year staggered terms, at least 3 owners for committees, exec committee =officers who oversee ops, BOD for larger decisions



2b Operating Model – Governance Responsibilities

Owners Chinquapin owners in good standing; Reserved rights (20% quorum)	Board 7-11 owners (51% quorum)	Exec Committee Officers (minimum 3)
<ul style="list-style-type: none"> • Elect board – majority vote • Change bylaws – majority vote • Change covenants – 2/3 majority vote • Sell common element assets – 80% vote (NC statute) • Raise assessment by greater than 10% – 80% vote (Covenants) • Special assessment of > \$1000- majority vote 	<ul style="list-style-type: none"> • Appoint officers and establish and appoint committees • Set size of board (7-11) • Approve annual budget and annual assessment • Special Assessment <\$1000 for unexpected expense • Approve any indebtedness • Approve capital purchases beyond budget and use of reserves • Serve as final appeal body 	<ul style="list-style-type: none"> • Manage HOA day to day • Hire and supervise staff • Recruit & Nominate committee appointees • Assure proper communications with owners

Notes:

- Additional details will be added to our bylaws (ex: election process, term limits, quorum details, etc.)
- Required board qualifications and representation needs (across our communities e.g., natures walks, ft/pt, renters, investors, ...)

2c Operating Model - Governance

Standard Operating Procedures (SOPs)

SOP Examples

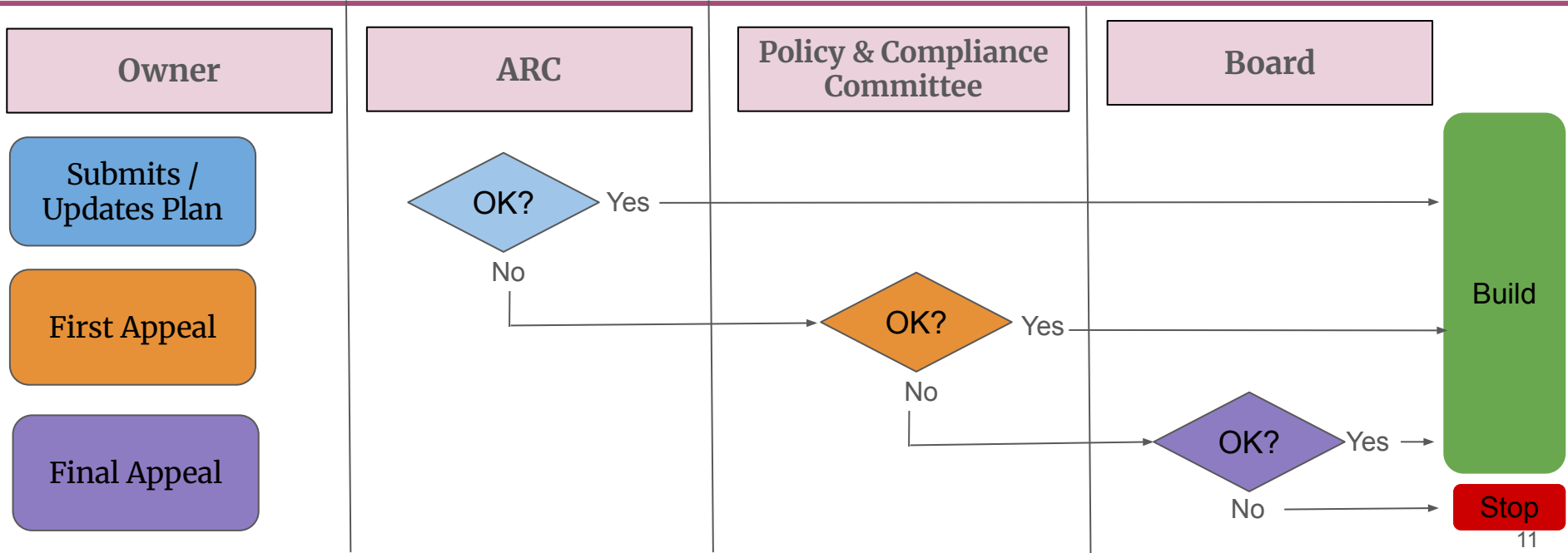
1. Building requirements (trees, water, architecture review, etc.)
2. Grounds Maintenance
3. Amenities Access
4. Rental rules
5. Existing homes - resells, additions, exterior changes
6. Community gate access
7. High Hemlock access

8. Emergencies (Fire, Medical, Weather Events)
9. Outages (water, gates, etc.)
10. Post Office
11. HOA Violations
12. Community Property Rules (Outpost, Driving Range, etc.)
13. Safety / Security
14. Community summer parties

Call to Action: What have we missed? Please email us at info@chinquapinowners.com

2d Operating Model - Governance Standard Operating Procedures (SOPs)

Architecture Review Committee (ARC)



2e Outside of SOPs, we have begun an **Issues List** to help us track additional items. These will be prioritized as we transition to the HOA.

1. Entrance split rail fencing
2. Cow Mtn timber yard tree removal, yard junk removal, landscaping
3. Black barrier fencing in common areas
4. General grounds clean-up (pipes, rebar, etc.)
5. Overlook ditch cleanup
6. Mailroom solution (short & long term)
7. Trail bridge repairs
8. UTV and walking bridge repairs
9. New street signs
10. Homeowner's address signs

11. Road repairs
12. Gate software system reliability
13. Amenity signs repair
14. Frisbee golf clean-up, mowing, repair
15. Fishing / stocking trout
16. Pickle ball court repairs
17. Mini-golf / driving range safety
18. Air rifle range clean-up
19. Bow/arrow range safety
20. Logan's gap ditch repair
21. Environmental review of maintenance area

Call to Action: What have we missed? Please email us at info@chinquapinowners.com

3 Operating Model Management

Management

- Understanding of existing staff and hiring staff required to operate
- Implementation standard operating procedures

Staffing Needs

- Roles needed and well defined job descriptions
- General Manager - responsible for the day to day operations
- Property Manager - responsible for grounds, maintenance, weather-related needs, and improvements
- Existing staff
- Evaluate roles & responsibilities and needs

Implementation of SOPs

- Use the SOPs to manage the day to day

3a Operating Model - Management Existing Team Members

Jane Baldwin



Rhonda Lekan



3b Operating Model - Management Property Manager

Lucas Murdock



Provide leadership over the property of the Chinquapin community. Reports to the General Manager and ensures the property is maintained and operated in accordance with Chinquapin standard operating procedures.

Essential Duties and Responsibilities

- oLeads maintenance team including preparation of schedules, coordinating work orders and training team.
- oOrganize, prioritizes, and ensures that service requests and repairs are made correctly and in a timely manner, recording such activities to properly maintain data.
- oEnsure the builders are following site protocols outlined in the ARB and report discrepancies to the General Manager.
- oEnsure emergency preparedness and consistent execution of storm management protocols.
- oResponsible for 24-hour emergency maintenance service responses; on-call as required.
- oTours all property on a regular basis to ensure there are no issues across the community - property owners and community spaces
- oCoordinate, manage and oversee maintenance projects, working closely with vendors and contractors.
- oDevelop and recommend any changes or additions to the operating budget including a mid-year forecast in collaboration with the HOA committees.
- oProvide recommendations for aesthetic, maintenance, and safety improvements to the community.
- oEngage with HOA committees such as Finance, Operations, and Policy and Compliance.
- oWork closely with external professionals, including engineers, attorneys, insurance professionals, and construction management firms.
- oOperates various vehicles and equipment such as dump truck, backhoe, tractor, etc.
- oPerforms preventative and minor maintenance on equipment.

3c Operating Model - Management Hiring - General Manager

Katie Nicholson



A native of Dublin, Georgia, and an alum of Georgia Southern University, Katie began her career in Atlanta at Jamestown, a global real estate investment company. In 2011, Katie joined Chinquapin with the Carlton family and continued with Waterfront & Mark Adkins when they acquired the property in 2015. Katie managed the office and sold properties as a licensed agent. In 2021 she left to expand her business and continue to sell property at Chinquapin and throughout the Cashiers/Highlands Plateau. Katie plans to continue to sell real estate across the Plateau.

Katie and husband Jeremiah, who was born and raised on the plateau, love exploring all of the natural beauty of our area, hiking with friends and their dog, Bella.

- Part-time (50%). Contract agreement.
- Her real estate business will remain separate from Chinquapin work.

Provide leadership over the communication, governance, and management of the Chinquapin community and owners. Directly supervise the Property Management team and ensure the property is maintained and operated in accordance with Chinquapin standard operating procedures. This person will report to the President of the HOA Board of Directors.

Essential Duties and Responsibilities:

- Partner with the Board of Directors and Executive Committee to lead the operations of the Chinquapin community by following the governance model established by the HOA Board.
- Assist in the implementation of processes and programs that the community proposes through the HOA Executive Committee.
- Work with homeowners that are in the build process to approve all architectural control applications and building requirements and close them out in a timely manner.
- Monitor build sites to ensure the rules for the building process are being followed. Process and manage violations and close them out regularly. Escalate to the Board of Directors for repeat problems or grievous issues.
- Conduct community inspections regularly of the common property and established homeowner properties. Identify deficiencies and provide notices of violations to the respective authorities. Process and manage violations and close them out regularly.
- Maintain knowledge and understanding of contract between the HOA, the community, and vendors/partners. Ensure all contractual obligations are being met. Evaluate and monitor vendor contracts regularly, request bids when needed, submit renewal/cancellation notices, manage contract renewals and advise the Board of any upcoming renewals or lapse in coverage.
- Plan and organize the summer event series and contract with vendors to partners for the event.
- Keep written documentation on any potential liability for the community and notify the Board of Directors immediately.
- Recommend and manage the budget for the functional area of responsibility. Monitor expenses, initiate cost reduction programs and negotiate prices. Ensure property expenses are maintained within budget.

Section 2 - Business Review

There are 3 components of the business review:

1. Review the **transition to HOA**
2. Review our **budget** and **monetary requirements** of our HOA.
3. Review the **property transfer** process
 - a. Current property
 - b. Transfer of remaining properties

1a Business Review – HOA Transition

Water

The Chinquapin LLC and Chinquapin HOA are working together to solve issues that are needed for the close-out and transition of the HOA. The first of these items is our **Water System**.

Water – Moving Forward

- Additional **builder education on the specs** required between the meter & house to alleviate pressure problems. We'll have **Property Management inspection** and signoff to ensure the above.
- We have two water tanks. We're **integrating the 2nd tank into the water system**
 - Bill Benner and Mark Adkins working together to solve (along with Alec Stillwell Engineering, & Environmental, Inc.)
 - Timeline will go past October 1st
 - Mark will continue to help us fully resolve the issue
- **Monitoring** system – we'll have the ability to monitor the two **tanks water levels**. This will be included in the near-term plans.

1b Business Review – HOA Transition Reserve Study

The second item is maintenance of our community infrastructure. Some examples include our **roads, bridges, community buildings** which an HOA pays for general through their **Reserve Funds**. We recommend a **Reserve Study** to be done in the first year of the HOA transition.

Reserve Funds Definition:

- Funds that the **HOA sets aside for future financial obligations** such as major repairs, replacements, and maintenance.

Reserve Study Definition:

- An **independent study** to assess our associations assets which is done in an effort to keep our reserve funds at an optimal level. It typically involves on-site inspection to calculate the **estimated remaining life of common elements** and the **estimated cost of repairing or replacing** them.
- Reserve studies consist of two parts, namely:
 - **Financial Analysis.** This examines the association's financials such as its income and expenses. It also takes the current reserve fund into account.
 - **Physical Analysis.** This examines the physical condition of the association's common elements along with the estimated cost of repairing or replacing them.

2a Business Review Financial Goals

- **Clear, measurable objectives**
 - Maintaining minimum \$1mm reserve level
 - Optimizing operating costs to align with HOA vision & objectives
- **Short-term priorities**
 - Budget Stability
 - Funding defined asset acquisitions
 - Improving Common Area Appearance

- **Long-term vision**
 - Sustainability
 - Capital Improvements
- **Strategies to achieve goals**
 - Complete reserve study
 - Dues increase
 - Cost control measures
- **Implement monitoring & review processes**

2b Business Review Financials - Reserves

- **Reserve Balance (as of 07/31/2025)**

- Cash \$660,338.23
- AB CD \$258,255.04
(matures 9/8/25 @ 3.93%)
- Total \$918,593.27

- **Purpose of Reserves**

- Emergency fund
- Capital projects

- **Target Reserve Level**

- EOY 2026 = \$1M
- EOY 2027 = \$1.5M
- EOY 2028 = \$2M

- **Reserve Study**

- To be completed in 2026
- Establish reserve adequacy & planned adjustments
- Establish policies on contributions and withdrawals

2c Business Review Financials - Budget Forecast 2026

Total Income (330 Lots @ 3,850/lot): \$1,280,500

Major Expense Categories:

Maintenance \$608,600

Payroll \$356,865

Administrative \$69,350

Community Events \$40,000

Total Expenses: \$1,074,815

Reserves Contribution: \$ 205,685

3a Business Review Property / Assets

HOA Currently Owns:

In 2024, the Chinquapin LLC transferred a tremendous asset to us - 79 acres that represent our Outpost and the surrounding greenspace.

- 79 Acres
- Parcel 7584-91-2454
- Represented in the blue on the right

Additionally, the LLC will transfer:

All infrastructure (e.g. water, roads, septic) and additional greenspace & amenities



3b Business Review Property / Assets

Greenspace & Amenities

The LLC will transfer the following:

Parcel	Description
7583-46-1679 7583-46-0495 7583-46-3259	Wolf lake, dock, land
7584-43-0757	Fish Shack & surrounding area Little Cow Cow Mtn Logging Area
7583-38-8272	Post Office
7594-02-8320	TeePee Village & Bath houses
7584-90-7916	Nature's Walk green space
7584-43-0757	Julie & Charlie Waterfalls and approach trails

Purchasing

The LLC will sell the HOA the following:

Parcel	Description
7594-00-6814	Maintenance facility on Breedlove
7584-90-8479	Triangle at Outpost
7583-46-5843	Trading Post

3c Business Review Property / Assets

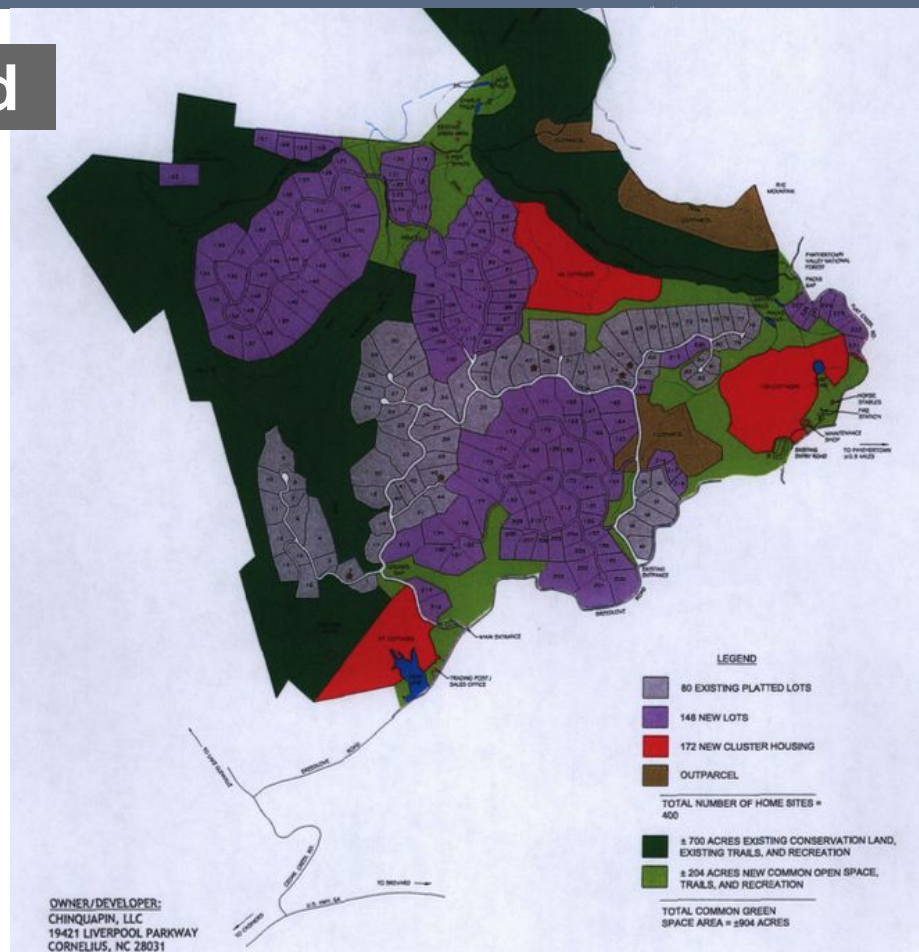
Retaining

The LLC will retain the following.

Parcel	Description
7594-11-1471	Stables / Horse Farm (deed restricted for restricted use; can't be subdivided)
7594-02-6561	Discovery Cabins (deed restricted for owner/guest rental only)
7584-43-0757	Wilderness Cabins with small parcels (deed restricted for owner/guest rental only)
7584-90-1846	Gated Metal buildings by dumpsters

Parcel	Description
7583-68-2588	Logan's Gap Overlook (access usage agreement)
7584-90-8715	Lower Parking by Pickleball
7583-38-8272	Helipad on Breedlove (It's an FAA registered site; deed restricted to keep as is)

3d



Master Development Agreement Addendum

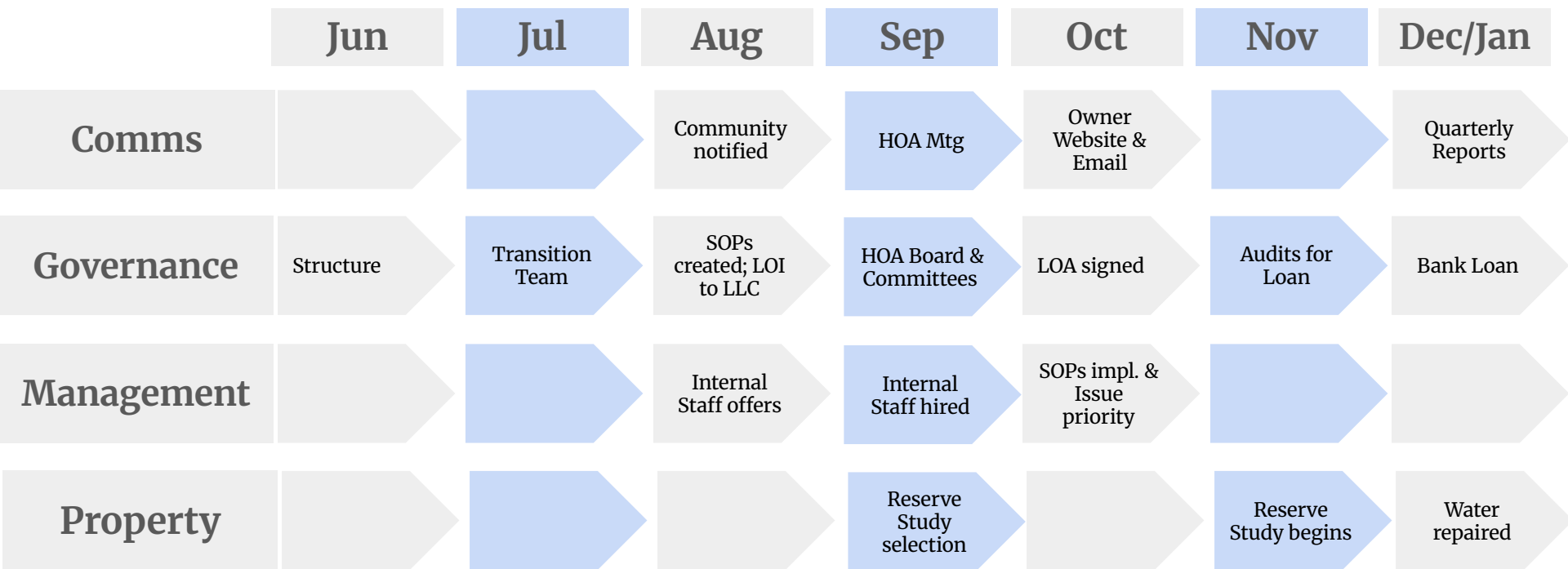


Cluster housing:

- Nature's Walk 100
- Wolf Lake 27
- Packs Creek 45

Section 3 - Timeline & Closing

Timeline Key Milestones



Closing

What we covered today:

- **Operating Model:** 1) Communications, 2) Governance, and 3) Management
- **Business Review:** 1) Transition to HOA 2) Budget 3) Land and Amenities proposal

What's next (Sept-Oct)

- **Sept 12:** HOA Bylaws, Board & Committees **election**
- Internal staff **hiring**
- **LOA** signed

Additional Info: transition team bios and contact info

Call to Action: SOP & Open Items suggestions, Consider serving on the HOA committees

Transition Team Bios



Allen Dobson
Chair

L. Allen Dobson Jr., M.D. is a native of North Carolina and longtime resident of Mount Pleasant, NC. Allen is currently the editor in chief of Medical Economics and retired President and CEO of Community Care of NC Inc., in Raleigh.

Allen received his undergraduate education at North Carolina State University. He attended medical school at Bowman Gray School of Medicine at Wake Forest University and completed his residency in family medicine at East Carolina University. He was the founding partner of Cabarrus Family Medicine and the founder and director of Cabarrus Family Medicine Residency Program. Dr Dobson holds a faculty appointment of clinical professor of family medicine at the University of North Carolina at Chapel Hill.

Dr. Dobson has been actively involved in health policy on the state and national level and was a visiting scholar at the Brookings Institution. He was an early leader and developer of the national recognized “Community Care of North Carolina” program. This program received the 2007 Annie E Casey award for Innovations in Government, presented by Harvard’s Kennedy School of Government. He is formerly the Assistant Secretary of Health for the NC Department of Health and Human Services and the State Medicaid Director.

Dr. Dobson is also an experienced business leader and entrepreneur, having won awards for historic building restorations and having launched and operated a number of successful businesses. He has also established multiple organizations, for profit and not for profit, from local to national in scope.

He and his wife Martha were one of the first owners in Double Knob having purchased in 2016. They also were the first owners of the Firefly, which they owned while their house was under construction. They have 3 grown children and 4 grandchildren.



Bill Benner

Bill Benner is a full time resident of Chiquapin. Bill currently works for Veolia Water Technologies & Solutions and has spent over 41 years in the water treatment industry. Bill brings project management, outsourcing skills, and technical expertise as part of his business leadership.

Bill is a graduate from Georgia Tech. Bill started his career as a technician in the water industry and has served in roles of Account Manager, Area Manager, Marketing Engineer, Regional Engineer, and Global Water & Wastewater Product Manager. He is now a Subject Matter Expert for Veolia. He has water treatment patents with GE (some of which process the drinking water you purchase) and is in the GE and Veolia Hall of Fame for Sales.

Bill volunteers in our Chiquapin community by partnering with our developer, Mark Adkins to improve our water system. He has a passion for creating a solution that will serve our community for years to come.

Bill and his wife Kristi became residents in 2020 as full time residents in Chiquapin. Bill is originally from Athens, GA (Go Tech) but has spent most of his professional career in Alaska. He and his wife Kristi have four kids, and eight grandchildren spread out from GA to TX. They also have one of the original dogs in the neighborhood, Cooper, and the newest four-legged, Mae C.



Brent Walker

Brent Walker, CMI is a full time resident of Chiquapin. Brent has spent more than 35 years in public accounting as an Executive Director KPMG and EY. Brent is also a co-founder of CereTax, Inc. an Alpharetta, GA based software company and current owner and President of CT Services, a state and local tax professional services firm. Brent's experience includes providing professional tax services, along with complex tax software implementations to companies in a wide array of industries.

Brent has functional and technical expertise in SAP, Oracle, D-365 Business Central, NetSuite, and other legacy financial and ERP applications. He has lead numerous large tax engine integration projects including Vertex, OneSource, Avalara, and CereTax tax applications. Brent has developed unique approaches to overall solution designs that include streamlined integration techniques as well as outsource and co-source service offerings which leverage proprietary software in which he architected and led the development efforts. While much of Brent's career focused on tax technology solutions, his background also includes tenure as sales tax auditor with the State of Texas and several years in the energy and petrochemical industries.

Brent is Certified Member (CMI) of Institute for Professionals in Taxation (IPT). He has contributed to Tax Executive Institute (TEI), and American Petroleum Institute (API). He has been a speaker for the Texas Society of Certified Public Accountants.

Brent received a Bachelor of Business Administration majoring in Accounting from Texas State University.

Brent and his wife Fran became residents of Chiquapin in 2017. Brent, Fran, and their dog Beau enjoy the outdoors and community of our neighborhood.



Doug Barber

Doug E. Barber is a full-time resident of Chinquapin and has spent over 40 years cultivating a career in the food services industry. He currently is a founding investor in two startup companies : ERC HOMES & GOLFSUITES. Doug recently retired from the Cracker Barrel Old Country store as the EVP/COO/CPO. He oversaw 575 restaurants, 70,000 team members, and was responsible for the execution of brand values and expectations, sales growth, profits, and a return on shareholder value. He led short and long-term strategic planning that included opening over 200 stores and leading the Innovation Team focused on continuing company growth and development into the future.

A graduate from Central Michigan University, Doug began as an assistant manager trainee with Ponderosa Steakhouses. He honed his leadership skills and commitment to team member development as he rose through the ranks to become the President of Metromedia Family Steakhouses. While leading 750 Ponderosa and Bonanza Steakhouses, he was also an Executive Board member of the Metromedia Restaurant Group that oversaw the strategic planning of all MRG brands (Ponderosa, Bonanza, Bennigan's, Steak & Ale, and The Tavern). MRG developed & operated restaurants in the United States of America, Canada, Europe, Puerto Rico, Central America, Qatar, Dubai and South Korea.

Doug was able to continue his passion and dedication to the development of current and future leaders throughout his involvement with the Women's Food Service Forum. He was a member of the organization from its early years serving as a board member from 2008-2014, including being recognized as Board Member of the Year in 2012.

Doug and his wife Kim have been full time residents of Chinquapin upon the completion of their dream home in 2022. After raising 2 daughters they have retired happily with their 2 dogs Freddie & Cashiers to their home at Barber Falls, Chinquapin.



Emma Geisler

Emma Geisler has been a resident of NC for over 6 years, but her ties to North Carolina go back much further. She obtained her Masters from UNC before serving as a professor at UNC as well as High Point University. Emma is a seasoned strategic leader with over 18 years of experience guiding complex initiatives across enterprise environments, including the last 6 years in high impact roles at Deloitte Tax.

Emma's work has spanned Fintech and high security sectors, where she has led the development and implementation of forward-looking strategies, enterprise transformation plans, and performance accountability frameworks. At Deloitte, Emma has played a pivotal role in shaping strategic growth plans, aligning cross-functional leadership, and delivering measurable outcomes for both internal operations and client-facing initiatives. Emma's career has been defined by a commitment to transparency, long-term vision and collaborative problem-solving. Emma is known for pioneering strategic forecasts that anticipate future needs and align diverse teams around shared goals, delivering measurable impact in high-stakes settings. Beyond her professional accomplishments, Emma and her husband Goose are deeply rooted in their surrounding communities. Together, they actively volunteer, contribute time and resources to local causes, and support neighborhood improvement efforts. Their hands-on involvement reflects a genuine dedication to fostering inclusive, well managed, and connected communities.

Emma has served on the Strategic Planning Committee for Burlingame Country club where she assisted in developing long range plans and goals for the club. Including conducting reserve studies, establishing a 7 year funding plan and developing a long term strategic plan for capital projects.

Emma has lived in Chinquapin since 2019 and is currently planning a new house build in Chinquapin to root her boots into alongside her husband Goose and her Great Dane Gunner.

Transition Team member - Emma is not running for Board of Directors



Frank

Frank Gaston is a full-time North Carolina resident and spent the last 40 years as a self-taught entrepreneur at Hilton Head Island. Frank has been involved in several businesses including: sports bar & restaurant, restaurant equipment, real estate, and retail sales management.

Over the past 30 years Frank and his wife Susan owned and operated the Palmetto Dunes General Store making it a local favorite known for its food and charm. Frank also founded and operated Hilton Head Boat Rentals which offered over 25 different boats for resort guests. He played a key role as management at Shelter Cove Marina which was voted “Best Harbor in the Southeast” and the fourth best harbor in the U.S. Additionally, Frank was responsible for Hilton Head Outfitters which offered over 2,000 bikes for rent, fishing charters and a retail shop. His management company worked with the developer Greenwood Development Co. for over 15 years with the goal of enhancing the guest experience across Palmetto Dunes Resort.

Frank has volunteered with Samaritan’s Purse Relief group several times and has enjoyed being involved and helping others. Some of his hobbies include gardening, landscaping, fishing, hiking and just about anything outside.

Frank has been married for 42 years to his wife Susan and together they have two daughters and five grandchildren. After retiring Frank and Susan spent a year looking for mountain property and found Chinquapin to be the perfect fit and have been settling in for the last couple of years.



Kay

Kay Lucas is a new resident to North Carolina and has spent over 35 years in technology and operations with many of those years dedicated to building solutions in the Human Resources, Benefits, and Payroll industry. Kay recently retired from Automatic Data Processing (ADP) where she spent 20 years of her career. She was the Vice President and General Manager of an outsourcing division overseeing 750 global team members with revenues of \$325M, P&L responsibility, and established the strategic vision.

Kay spent half of her career at start-up organizations and the remaining in Fortune 500 businesses. In addition to her recent position, Kay was the VP & CPO at Lanier, Employease, Docufree, PeopleMatter, and ADP.

A graduate from the University of Florida, Kay began her career in sales and then had roles in service, training, marketing, project management, and product management before becoming a leader of technology and operations.

Kay also spends her time volunteering. She recently moved from the Atlanta area where she volunteered for North Fulton Community Charities, Girls Inc., the Foster Care Support Organization, No Longer Bound, and Children’s Development Academy where she also served on their board. Currently Kay is a driver for the American Cancer Society where she takes patients that don’t have their own transportation to their treatment facilities.

Kay and her husband Carter purchased their property in Cow Mountain in 2021 and moved into their home full-time with their dog Peat in April 2025. They have two children, Rachel and Maxwell, who live in Colorado.



Rich

Richard Vieitez has made Palm Coast, FL his home for the past 30 years after moving from Queens, NY where he was born and raised. Since 2020 he has also enjoyed being a part time resident in the Chiquapin community of North Carolina, a place that has become very special to him and his wife Amy.

When Richard first arrived in Florida he began working with an Anheuser-Busch wholesaler in St. Augustine. Over the next 13 years he grew into the role of territory sales manager, helping build the brand's presence and dominate market share throughout the region. Those years not only helped shape his professional path but also gave him the confidence to pursue his own entrepreneurial dreams of one day working for himself.

In 2006 Richard followed that dream and opened his first indoor tanning salon. Over the last 19 years with dedication and hard work, he expanded this business into multiple successful locations throughout Volusia and Flagler counties, which he and his wife Amy still operate today.

Rich and Amy enjoy spending as much time as possible with their two grandchildren while in Palm Coast. They hope to be able to be full time in Chiquapin in the very near future.



Sally

Sally Alvis is a part-time resident in North Carolina with her full-time residency in Lufkin, Texas. Sally has served as Senior Director of Marketing and Community Relations for a regional employee-owned grocery chain, owned a marketing consulting business and shepherded private schools, companies and nonprofits in the ways of brand and reputation management. A storyteller at heart, and a journalist by education, Sally's years as a television news anchor provide rich media relations and crisis management experience.

In retirement, she helped spearhead an initiative to create a Texas Commission on the Arts Cultural District in Lufkin, Texas. As a former Board chairman of Lufkin Creative, the Angelina Arts Alliance, Kurth Memorial Library and founding board member of Angelina Thrive, Sally instills excellence in nonprofit management and equips board volunteers and staff to dig in.

A graduate of The University of Texas at Austin, Sally has taken classes on nonprofit leadership at the James Baker Institute at Rice University and teaches Marketing for Nonprofits at Angelina College's Nonprofit Leadership Center. She and her husband co-teach The Chamber of Commerce's Leading Edge program for emerging nonprofit leaders as well as a young adults Sunday School class.

Sally and her husband Max purchased their property on Cow Mountain in June 2021 and moved into their home in October 2023. They have two daughters, Anna Catherine and Elisabeth and look forward to welcoming their first grandchild this fall.



Tim Wellman and his spouse, Vivian have been ‘half-back’ residents of Chinquapin since 2020. Having friends in Laurel Falls, Tim and Viv would routinely hike into Chinquapin when visiting the area. When lots were initially offered for sale at the 2015 auction-style sale, they quickly picked up their homesite on Firesong Lane.

Tim retired from Raytheon after a distinguished career in the defense industry. Post his retirement, Tim served on his Florida condominium board as a director-at-large, VP, and President. He facilitated negotiations with the declarant during the turnover process and ultimate settlement agreement.

Tim’s professional career spanned numerous special projects. His expertise is in turning around troubled/problem programs.

Tim embedded in the NYC region to investigate and resolve a problem supplier for the Perimeter Intrusion Detection System (PIDS) program which Raytheon was developing for the PANYNJ (Port Authority of New York and New Jersey). Previous to his work on PIDS, Tim directed the Florida region Enterprise Process Center where he led the facility transition to the Software Engineering Institute Capability Maturity Model Integration (CMMI). The Florida region, in conjunction with 4 other regions developed and deployed engineering processes guiding the work of over 5K engineers.

Prior to Tim’s career with Raytheon, he worked for several companies providing services to the intelligence community to include HRB-Singer, Loral Data Systems, and ManTech International. In these businesses he managed and/or developed numerous signals intelligence gathering, analysis, and processing systems deployed to numerous secure facilities worldwide.

Tim is a graduate of West Virginia University where his love for the Appalachian mountains was formed.

Transition Team

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