

OAKWOOD ESTATES COMMUNITY ASSOCIATION, INC.
DOCUMENT RETENTION POLICY

STATE OF TEXAS §
 §
COUNTY OF HARRIS §

I. PURPOSE

The purpose of this Document Retention Policy (the “**Policy**”) is to prescribe the document retention policy pursuant to Section 209.005 of the Texas Property Code. The Board of Directors (the “**Board**”) of the Oakwood Estates Community Association, Inc. (the “**Association**”) has determined that it is in the best interest of the Association to establish this Policy concerning the retention of records of the Association.

II. APPLICABILITY AND AUTHORITY

The property encumbered by this Policy is that property restricted by the Declaration of Covenants, Conditions, and Restrictions for Oakwood Estates, recorded in the Official Public Records of Harris County, Texas, under Clerk’s File No. RP-2022-380139, as same has been or may be amended from time to time (the “**Declaration**”), and any other property which has been or may be subsequently annexed into Oakwood Estates and made subject to the authority of the Association.

All capitalized terms used in this Policy are defined in the same manner as set forth in the Declaration and the interpretation provision set forth in the Declaration applies to this Policy, which definitions and interpretation provision are incorporated in this Policy by this reference.

The Board adopts this Policy, which runs with the land and is binding on all Owners and Lots within the Property. This Policy is effective upon the recording of same. After the effective date, this Policy replaces any previously recorded or implemented policy that addresses the subjects contained in this Policy.

Invalidation of any one or more of the covenants, conditions, restrictions, or provisions contained in this Policy will in no way affect any one of the other covenants, conditions, restrictions, or provisions of this Policy, which remain in full force and effect.

III. DOCUMENT RETENTION POLICY

This Policy provides for the future systematic review, retention, and destruction of documents received or created by the Association in connection with the transaction of the Association’s business. This Policy covers all records and documents, regardless of physical form, and contains guidelines for how long certain documents should be kept and how records should be destroyed.

The Association retains specific documents for the time periods outlined in the attached **Exhibit “A”**. Documents that may not be specifically listed will be retained for the time period of the documents most closely related to them as listed in the schedule.

RP-2022-410743

Electronic documents will be retained as if they were paper documents. Therefore, any electronic files that fall into one of the document types on the attached Exhibit "A" will be maintained for the identified time period.

The Custodian of Records of the Association is responsible for the ongoing process of identifying the Association's records which have met the required retention period and overseeing their destruction. Destruction of any physical documents will be accomplished via shredding. Destruction of any electronic records of the Association will be made via a reasonable attempt to remove the electronic records from all known electronic locations or repositories.

CERTIFICATION

I certify that, as President of the Oakwood Estates Community Association, Inc., the foregoing Document Retention Policy was approved on the 27th day of July, 2022, at a meeting of the Board of Directors at which a quorum was present.

DATED this the 27 day of July, 2022.

By: [Signature]
Print Name: MARK JAPIK
Title: PRESIDENT

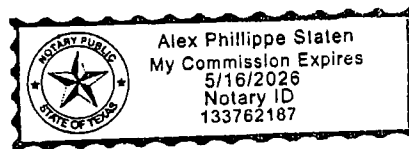
STATE OF TEXAS §
 §
COUNTY OF Fort Bend §

BEFORE ME, on this day personally appeared Mark Japik, the President of the Oakwood Estates Community Association, Inc., known by me to be the person whose name is subscribed to this instrument, and acknowledged to me that s/he executed the same for the purposes and in the capacity stated in this instrument, and as the act and deed of said corporation.

Given under my hand and seal of office, this 27 day of July, 2022.

[Signature]
Notary Public – State of Texas

After Recording Return To:
Casson Wen
Isabella L. Vickers
Roberts Markel Weinberg Butler Hailey PC
2800 Post Oak Blvd., 57th Floor
Houston, Texas 77056



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EXHIBIT "A"
DOCUMENT RETENTION POLICY

DOCUMENT TYPE	DEFINED	TIME PERIOD	EXCEPTION
Account Records of Current Owners	Member assessment records	5 years	Unless period of ownership exceeds 5 years, then retain last 5 years.
Audit Records	Independent Audit Records	7 years	
Bylaws	And all amendments	Permanently	
Certificate of Formation	And all amendments	Permanently	
Contracts	Final contracts between the Association and another entity	Later of completion of performance or expiration of the contract term plus 4 years	
Financial Books & Records	Year End Financial Records and supporting documents	7 years	
Minutes of Board & Owners Meetings	Board minutes and written consents in lieu of a meeting; Annual member meetings	7 years	
Restrictive Covenants	And all amendments	Permanently	
Tax Returns	Federal and State Income and Franchise Tax Returns and supporting documentation	7 years	

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Pages 4
08/11/2022 09:02 AM
e-Filed & e-Recorded in the
Official Public Records of
HARRIS COUNTY
TENESHIA HUDSPETH
COUNTY CLERK
Fees \$26.00

RECORDERS MEMORANDUM

This instrument was received and recorded electronically and any blackouts, additions or changes were present at the time the instrument was filed and recorded.

Any provision herein which restricts the sale, rental, or use of the described real property because of color or race is invalid and unenforceable under federal law.

THE STATE OF TEXAS
COUNTY OF HARRIS

I hereby certify that this instrument was FILED in File Number Sequence on the date and at the time stamped hereon by me; and was duly RECORDED in the Official Public Records of Real Property of Harris County, Texas.



Teneshia Hudspeth
COUNTY CLERK
HARRIS COUNTY, TEXAS

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