



# Heritage Bay Golf and Country Club

## TRANSFER OF MEMBERSHIP PROCEDURES

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*Transfer privileges are available only to owners in good standing with their Association and Club accounts.*

At least thirty (30) days prior to the start date of a Transfer of Membership, Heritage Bay Golf & Country Club must be in receipt of:

1. A completed and fully executed Transfer of Membership Application
2. The \$350 Transfer Fee
3. Lease approval from the Neighborhood Association's Management Company

### HERITAGE BAY TRANSFER OF MEMBERSHIP APPLICATION

- Always use the current form as found on Heritage Bay's website, [www.golfheritagebay.com](http://www.golfheritagebay.com), under the 'Real Estate' tab on the public home page (you do not need to log in as a Member).
- Please be sure everything is filled in correctly and legibly. This information is necessary to accurately create a membership.

**It is mandatory that The Transfer of Membership Application is signed by the Member, or their authorized agent, confirming that the Member understands and accepts that their Club privileges will be suspended for the period of transfer they have indicated on the Application.**

- Transferee Information
  - The transferee must have a valid e-mail address entered on the form as we will communicate the transfer exclusively through email.
  - Transfers must be for at least **30 consecutive days**.
  - Please submit only the information required on the form; any additional information should be submitted on a separate sheet of paper.
- Only the names of persons who qualify for membership are to be entered on the transfer form; no guests, relatives or occasional visitors.
  - *For details on persons who qualify for membership, refer to the Certificate of Amendment to the Amended and Restated Declaration of Covenants, etc., signed 3/23/09 and recorded 4/1/09 ([Click Here](#))*
  - *For specific rules and regulations regarding membership transfers, refer to pages 3-6 of the Rules & Regulations, as amended 10/18/18 ([Click Here](#))*

**\*\* Incomplete, incorrect or illegible Transfer Applications will delay the transfer process. \*\***

## **WHEN TO SUBMIT THE TRANSFER OF MEMBERSHIP APPLICATION**

- Heritage Bay Golf & Country Club must receive the completed Transfer of Membership Application and Transfer Fee at least **thirty (30) days in advance** of the start date of the transfer.
- You can submit the Application and Fee as far in advance as you like.
- Check or money order are the only accepted forms of payment for the Transfer Fee.
- Every effort will be made to expedite transfer requests that are submitted less than thirty days prior to the transfer start date. However, no guarantee is made that the Transfer Member will have Club privileges on the requested start date, especially during the height of season. Transfer of Membership Applications are processed on a “first come, first served” basis.

## **TRANSFER PERIOD DATE CHANGES**

- If needed, a single change to the dates of a transfer can be made without a new Application and Fee.
- A request for a date change must be submitted in writing by the homeowner or their registered agent. Transferees cannot make changes to their transfer dates.
- Change requests must be submitted at least one week prior to the new arrival or departure date.

## **HOW WILL THE TRANSFER MEMBER KNOW THAT THE TRANSFER HAS BEEN PROCESSED?**

- Transfer members will receive **two** e-mails from the Administration Office:
  1. A confirmation that the Transfer of Membership Application and Transfer Fee have been received.
  2. A confirmation that the transfer has been processed, which includes the details of their membership, a request to schedule an onboarding appointment (when they will obtain their Member ID Cards and complete any necessary paper work), and an invitation to a group orientation.

## **APPROVAL TO LEASE FROM THE NEIGHBORHOOD ASSOCIATION**

- Approval from the applicable Neighborhood Association is **mandatory** for approval of a Transfer of Membership.
- This includes transfers to family members, non-paying guests and renters who have previously rented.
- Contact the Neighborhood Association’s Management Company for their rental process.

## **GATE ACCESS**

- It is the Owner Member’s responsibility to add their renters to their authorized visitors list.
- Instructions for authorizing guests via Heritage Bay’s automated phone system and the online CapSure site are available on Heritage Bay’s website under the Access/Emergencies tab and then the Visitor Management page.

## **MEMBER NUMBERS AND MEMBER ID CARDS**

- Member are not to give their Membership Number or Member ID cards to their transferees. This is a violation of Heritage Bay’s governing documents.
- Transfer Member are provided their own specific Member Numbers and Member ID cards.
- Transfer Members’ food and beverage charges are deducted from the transferring Member’s annual Food & Beverage Minimum. Transfer Members must provide their Member Number to the Club staff for this deduction.

## **WHAT HOMEOWNERS SHOULD TELL THEIR RENTERS PRIOR TO ARRIVAL**

- Directions to their property from the gatehouse entrance.
- How to obtain the keys or access codes to the property and what to do if they lose their keys.
- Who to call if something in the home does not work or if they need assistance operating appliances.
- Compliance with Heritage Bay's Rules and Regulations are mandatory. Owner Members are held responsible for the actions of their guests and tenants. The Rules and Regulations are available at [www.golfheritagebay.com](http://www.golfheritagebay.com) under the "Master Documents" section of the 'Real Estate' page.

***Please note:** Neither the Administration office nor the gatehouse have keys to any properties or information regarding appliances or other issues that arise inside the housing units.*

### **Frequent questions/requests renters have about a property they will be occupying:**

1. Instructions on how to use the remote controls for your electronic devices and appliances.
2. Who to call about water, electricity and TV issues.
3. Instructions on how to regulate the climate controls.
4. Location of trash bins or dumpster.
5. Schedule of trash and recycling days.
6. Wi-Fi password for your property.
7. Location of water valves.
8. Who to contact if something occurs in your home that needs immediate attention.
9. Location of mail boxes and the mail box keys.
10. Parking and locations for guest parking.
11. Your recommendations for restaurants, shopping, salons, etc.