

**PROPOSED ANNEXATION OF KINDERTON VILLAGE BY THE  
TOWN OF BERMUDA RUN**

Prepared By : The Kinderton Village Homeowner's Association Annexation Committee

Submitted By : Dick Heriot, Secretary, Single Family Sub-Association

Submitted On : September 8, 2010

FORWARD

In May 2010, the Board Of Directors of the Kinderton Village Home Owner's Association decided to seek resident support for annexation by the Town Of Bermuda Run. The Board determined that annexation would be in the best interests of the residents, owners, builders, and developers of Kinderton Village, and would be beneficial to the Town Of Bermuda Run as well.

To pursue the goal of obtaining the support of a majority of Kinderton Village residents, the Board established the Kinderton Village Annexation Committee with the following charter:

- understand the overall annexation process
- initiate and promote the annexation support effort within the Kinderton Village community
- solicit support from the residents, owners, builders, and developers of Kinderton Village
- communicate the status of the annexation process to the Kinderton Village community
- create and assemble an annexation package to be presented to the Town Of Bermuda Run

The Annexation Committee held a community meeting on June 24, 2010 to kick-off the annexation process, and residents were asked to sign a petition supporting annexation. Members of the Kinderton Village community were afforded numerous opportunities to sign the petition over the ensuing weeks, including an additional community information meeting, scheduled home visits, door-to-door team visits, and club house sign-ups. In addition, much information regarding Bermuda Run and the annexation process was made available to the Kinderton Village community, and members of the community were given means to voice opposition to annexation, show support, raise new issues, and seek further clarification of annexation concerns. As a result of this work, the Annexation Committee believes that it has now obtained the approval of a sufficient number of Kinderton Village residents to support annexation by the Town Of Bermuda Run, as documented in the Charter Of The Town Of Bermuda Run. \*

The attached document represents an effort to present, in as much detail as possible, the results of Kinderton Village's annexation support process. The Board Of Directors of the Kinderton Village Home Owner's Association appreciates the opportunity to become part of The Town Of Bermuda Run.

\* Annexation – the type of the proposed annexation is, under North Carolina law, an “involuntary annexation”. In doing an involuntary annexation of residential property, the Town of Bermuda Run has an additional requirement (other than those requirements set out by the North Carolina General Statutes) imposed upon the Town by the Town Charter. The Charter, in Chapter VI., entitled “Special Provisions”, Section 6.1, entitled “Annexation” reads as follows: “The Town of Bermuda Run shall not annex any property without the vote or consent of a majority of the residents of any such property.”

PROPOSED ANNEXATION BY THE TOWN OF BERMUDA RUN, NC

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\* Additional pages may be added.

**KINDERTON VILLAGE HOMEOWNERS ASSOCIATION, ADVANCE, NC**

<b>DEFINITION OF TABLE HEADINGS</b>	
<b>TABLE COLUMN</b>	<b>DEFINITION</b>
HH	Number of individual households (houses / units)
EMP	Number of identified households unoccupied (empty) at time of petition signing process
ADJ	Number of individual households (HH) less unoccupied (EMPTY) houses / units
SIGNED HH	Number of adjusted households (ADJ) where at least one (1) adult member of the household has signed the petition
SIGNED HH %	Percent of occupied households (ADJ) with at least one (1) adult signature on petition (SIGNED HH / ADJ) X 100
SIGNED ACT	Actual number of individual adult petition signatures
EST RESIDENTS	Estimated number of adult residents (18 years of age and older) living in occupied households (ADJ). The following assumptions were used in estimating the number of residents per household: <ul style="list-style-type: none"> <li>• Single Family Households: 2.0 persons per household</li> <li>• Condo / Quad Households: 1.5 persons per household</li> <li>• Town Home Households: 1.5 persons per household</li> <li>• Carriage Home Households: 1.5 persons per household</li> </ul> <p>The above household population density assumptions yield a weighted average for all of Kinderton Village of 1.9 persons per household</p>
SIGNED RATIO	Average number of residents per signed household based on actual signatures and signing households (SIGNED ACT / SIGNED HH)
SIGNED %	Percentage of estimated residents who have signed the petition (SIGNED ACT / EST RESIDENTS) X 100

<b>FORMULA CALCULATIONS SUMMARY</b>		
<b>ITEM</b>	<b>FORMULA</b>	<b>EXAMPLE</b>
SIGNED HH %	Number of occupied households with at least one adult signature divided by the number of occupied households. Result is expressed as a percentage.  <b>(SIGNED HH / ADJ) * 100</b>	260 households with at least one adult signature / 365 occupied households = 71.2%
SIGNED RATIO	Number of actual signatures divided by the number of occupied households.  <b>(SIGNED ACT / SIGNED HH)</b>	(440 signatures / 260 signing households) = 1.7 signatures per household
SIGNED %	Number of actual signatures divided by the number of estimated residents. Result is expressed as a percentage.  <b>(SIGNED ACT / EST RESIDENTS) *100</b>	(440 signatures / 685 estimated residents) x 100 = 64.2%

**KINDERTON VILLAGE HOMEOWNERS ASSOCIATION, ADVANCE, NC**

<b>SINGLE FAMILY PETITION STATISTICS</b>									
<b>STREET</b>	<b>HH</b>	<b>EMP</b>	<b>ADJ</b>	<b>SIGNED HH</b>	<b>SIGNED HH %</b>	<b>SIGNED ACT</b>	<b>EST RESIDENTS</b>	<b>SIGNED RATIO</b>	<b>% SIGNED</b>
Avalon Street	5		5	4	80.0%	7	10	1.8	70.0%
Bridgewater Drive	38		38	27	71.1%	49	76	1.8	64.5%
Brookstone Drive	23		23	21	91.3%	38	46	1.8	82.6%
Greenway Street	5		5	4	80.0%	6	10	1.5	60.0%
Kilbourne Drive	1		1	1	100.0%	2	2	2.0	100.0%
Lake Point Drive	5	1	4	4	100.0%	9	8	2.3	112.5%
Lakeside Crossing	3		3	3	100.0%	5	6	1.7	83.3%
Millstone Lane	18		18	15	83.3%	27	36	1.8	75.0%
North Field Drive	13		13	10	76.9%	14	26	1.4	53.8%
North Forke Drive	38		38	29	76.3%	55	76	1.9	72.4%
Old Towne Drive	17		17	12	70.6%	23	34	1.9	67.6%
Parkview Lane	31		31	21	67.7%	34	62	1.6	54.8%
Rosewalk Lane	20	3	17	15	88.2%	27	34	1.8	79.4%
Sweetwater Circle	10		10	5	50.0%	8	20	1.6	40.0%
Town Park Drive	36		36	24	66.7%	37	72	1.5	51.4%
Waverly Street	5		5	3	60.0%	6	10	2.0	60.0%
Windsor Circle	10		10	4	40.0%	6	20	1.5	30.0%
<b>Single Family Totals</b>	<b>278</b>	<b>4</b>	<b>274</b>	<b>202</b>	<b>73.7%</b>	<b>353</b>	<b>548</b>	<b>1.7</b>	<b>64.4%</b>

**KINDERTON VILLAGE HOMEOWNERS ASSOCIATION, ADVANCE, NC**

<b>QUAD / CONDO PETITION STATISTICS</b>									
<b>STREET</b>	<b>HH</b>	<b>EMP</b>	<b>ADJ</b>	<b>SIGNED HH</b>	<b>SIGNED HH %</b>	<b>SIGNED ACT</b>	<b>EST RESIDENTS</b>	<b>SIGNED RATIO</b>	<b>% SIGNED</b>
Oakwind	18	1	17	14	82.4%	22	26	1.6	86.3%
Town Park Drive	18	1	17	8	47.1%	11	26	1.4	43.1%
Pinewood Lane	48	3	45	29	64.4%	45	68	1.6	66.7%
<b>Quad / Condo Totals</b>	<b>84</b>	<b>5</b>	<b>79</b>	<b>51</b>	<b>64.6%</b>	<b>78</b>	<b>119</b>	<b>1.5</b>	<b>65.8%</b>

<b>TOWN HOMES PETITION STATISTICS</b>									
<b>STREET</b>	<b>HH</b>	<b>EMP</b>	<b>ADJ</b>	<b>SIGNED HH</b>	<b>SIGNED HH %</b>	<b>SIGNED ACT</b>	<b>EST RESIDENTS</b>	<b>SIGNED RATIO</b>	<b>% SIGNED</b>
Old Towne Drive	8		8	4	50.0%	5	12	1.3	41.7%
<b>Town Homes Totals</b>	<b>8</b>	<b>0</b>	<b>8</b>	<b>4</b>	<b>50.0%</b>	<b>5</b>	<b>12</b>	<b>1.3</b>	<b>41.7%</b>

<b>CARRIAGE HOME PETITION STATISTICS</b>									
<b>STREET</b>	<b>HH</b>	<b>EMP</b>	<b>ADJ</b>	<b>SIGNED HH</b>	<b>SIGNED HH %</b>	<b>SIGNED ACT</b>	<b>EST RESIDENTS</b>	<b>SIGNED RATIO</b>	<b>% SIGNED</b>
Glenmoor Avenue	4		4	3	75.0%	4	6	1.3	66.7%
<b>Carriage Home Totals</b>	<b>4</b>	<b>0</b>	<b>4</b>	<b>3</b>	<b>75.0%</b>	<b>4</b>	<b>6</b>	<b>1.3</b>	<b>66.7%</b>

**KINDERTON VILLAGE HOMEOWNERS ASSOCIATION, ADVANCE, NC**

<b>KINDERTON VILLAGE PETITION STATISTICS - ALL RESIDENTS AND OWNERS</b>									
<b>GROUP</b>	<b>HH</b>	<b>EMP</b>	<b>ADJ</b>	<b>SIGNED HH</b>	<b>SIGNED HH %</b>	<b>SIGNED ACT</b>	<b>EST RESIDENTS</b>	<b>SIGNED RATIO</b>	<b>% SIGNED</b>
Single Family	278	4	274	202	73.7%	353	548	1.7	64.4%
Condo / Quad	84	5	79	51	64.6%	78	119	1.5	65.8%
Town Homes	8		8	4	50.0%	5	12	1.3	41.7%
Carriage Homes	4		4	3	75.0%	4	6	1.3	66.7%
<b>Kinderton Village Totals</b>	<b>374</b>	<b>9</b>	<b>365</b>	<b>260</b>	<b>71.2%</b>	<b>440</b>	<b>685</b>	<b>1.7</b>	<b>64.3%</b>

<b>KINDERTON VILLAGE RENTER SUMMARY</b>				
<b>GROUP</b>	<b>TOTAL HOUSEHOLDS</b>	<b>EMPTY HOUSEHOLDS</b>	<b>RENTER HOUSEHOLDS</b>	<b>ADJUSTED HOUSEHOLDS</b>
Single Family	278	4	10	264
Condo / Quad	84	5	6	73
Town Homes	8			8
Carriage Homes	4			4
<b>Kinderton Village Totals</b>	<b>374</b>	<b>9</b>	<b>16</b>	<b>349</b>

<b>KINDERTON VILLAGE PETITION STATISTICS - WITHOUT RENTERS</b>									
<b>GROUP</b>	<b>HH</b>	<b>EMP</b>	<b>ADJ</b>	<b>SIGNED HH</b>	<b>SIGNED HH %</b>	<b>SIGNED ACT</b>	<b>EST RESIDENTS</b>	<b>SIGNED RATIO</b>	<b>% SIGNED</b>
Single Family	278	4	264	202	76.5%	331	528	1.6	62.7%
Condo / Quad	84	5	73	51	69.9%	69	110	1.4	63.0%
Town Homes	8		8	4	50.0%	5	12	1.3	41.7%
Carriage Homes	4		4	3	75.0%	4	6	1.3	66.7%
<b>Kinderton Village Totals</b>	<b>374</b>	<b>9</b>	<b>349</b>	<b>260</b>	<b>74.5%</b>	<b>409</b>	<b>656</b>	<b>1.6</b>	<b>62.4%</b>

**EMPTY - FOR SALE/RENT HOUSES AND UNITS - NO SIGNATURE BY ABSENTEE OWNERS**  
 (Refer to petition tracking tables, column EMP)

**SINGLE FAMILY**

- 132 Lake Point Drive
- 103 Rosewalk Lane
- 137 Rosewalk Lane
- 161 Rosewalk Lane

**CONDO / QUAD**

- 113 Oakwind Drive, #302
- 292 Town Park Drive, #102
- 156 Pinewood Lane, #101
- 156 Pinewood Lane, #103
- 156 Pinewood Lane, #104

**TOWN HOMES**

**CARRIAGE HOMES**

**SUMMARY OF KINDERTON VILLAGE BUILDERS AND DEVELOPERS**

BUILDER/DEVELOPER	#LOTS	SIGNED PETITION
Adams, Eggless, Avant (AEA)	30	Yes - petition page 23
Craig Carter Builder, Inc.	2	Yes - petition page
Isenhower		TBD
DR Horton Builders		TBD
Other - Brookstone Drive		TBD
Other - Lakeside Crossing		TBD
Other - Parkview Lane		TBD



**KINDERTON VILLAGE HOMEOWNERS ASSOCIATION, ADVANCE, NC**

<b>RENTED/LEASED HOUSEHOLDS WITH SIGNATURES</b>			
<b>GROUP</b>	<b>STREET</b>	<b>SIGNED HH</b>	<b>SIGNED ACT</b>
SINGLE FAMILY	Avalon Street	0	0
	Bridgewater Drive	1	2
	Brookstone Drive	1	2
	Greenway Street	1	2
	Kilbourne Drive	0	0
	Lake Point Drive	0	2
	Lakeside Crossing	0	0
	Millstone Lane	1	2
	North Field Drive	1	1
	North Forke Drive	1	2
	Old Towne Drive	0	0
	Parkway Lane	1	3
	Rosewalk Lane	1	1
	Sweetwater Circle	1	2
	Town Park Drive	0	0
	Waverly Street	1	2
Windsor Circle	0	1	
CONDO / QUAD	Oakwind	1	1
	Town Park Drive	1	2
	Pinewood Lane	4	6
TOWN HOMES	Old Towne Drive	0	0
CARRIAGE HOMES	Glenmoor Avenue	0	0
<b>TOTALS</b>	<b>SINGLE FAMILY</b>	<b>10</b>	<b>22</b>
	<b>QUAD / CONDO</b>	<b>6</b>	<b>9</b>
	<b>TOWN HOMES</b>	<b>0</b>	
	<b>CARRIAGE HOMES</b>	<b>0</b>	<b>0</b>
<b>GRAND TOTAL</b>		<b>16</b>	<b>31</b>

**KINDERTON VILLAGE HOMEOWNERS ASSOCIATION, ADVANCE, NC**

<b>SINGLE FAMILY - PETITION NARRATIVE</b>		
<b>PETITION PAGE</b>	<b>ADDRESS</b>	<b>NARRATIVE</b>
1, 2a		NONE
2b	170 Bridgewater Drive	3 signatures, adult members of household
	173 Bridgewater Drive	Signatures on page 2e
	182 Bridgewater Drive	3 signatures, adult members of household
2c		NONE
2d	237 Bridgewater Drive	Signatures on page 2f
	238 Bridgewater Drive	Signatures on page 2g
2e	173 Bridgewater Drive	Refer to page 2b, Renters signed in lieu of owners
2f	237 Bridgewater Drive	Refer to page 2d
2g	238 Bridgewater Drive	Refer to page 2d
3a		NONE
3b	173 Brookstone Drive	Husband has legal power of attorney for spouse
3c	155 Brookstone Drive	New house, vacant, built/owned by Craig Carter Builders
4	104 Greenway Street	Renters signed in lieu of owners
5	125 Kilbourne Drive	Development Phase 3, one new house sold
6	118 Lake Point Drive	Adult son's family lives in household with owners
	132 Lake Point Drive	For Sale - Empty at time of petition signing
7		NONE
8a	113 Millstone Lane	3 signatures, adult members of household
8b		NONE
9a	109 North Field Drive	Signatures on pages 9c1 and 9c2
9b		NONE
9c1	109 North Field Drive	Refer to page 9a
9c2	109 North Field Drive	Refer to page 9a
10a	138 North Forke Drive	3 signatures, adult members of household
10b		NONE
10c	179 North Forke Drive	Signatures on page 10e
	213 North Forke Drive	3 signatures, adult members of household

**KINDERTON VILLAGE HOMEOWNERS ASSOCIATION, ADVANCE, NC**

<b>SINGLE FAMILY - PETITION NARRATIVE</b>		
<b>PETITION PAGE</b>	<b>ADDRESS</b>	<b>NARRATIVE</b>
10d		NONE
10e	179 North Forke Drive	Refer to page 10c
11a	189 Old Towne Drive	Refer to Town Homes page 21 for signature
	193 Old Towne Drive	Duplicate signature - refer to Town Homes page 21 for original signatures. 3 <sup>rd</sup> signature of adult member of household on page 12d.
	239 Old Towne Drive	3 signatures, adult members of household
11b	291 Old Towne Drive	3 signatures, adult members of household
11c	189 Old Towne Drive	Refer to page 11a
	193 Old Towne Drive	Refer to page 11a
11d	193 Old Towne Drive	Duplicate signature - refer to page 12d for original signature
12a	143 Parkview Lane	2 signatures by owners, 1 signature by renter, page 12d, counted as 1 household with 3 signatures
12b	182 Parkview Lane	Added to printed listing, signature on page 12e.
12c		NONE
12d	143 Parkview Lane	Refer to page 12a
	193 Old Towne Drive	Original signature - refer to narrative for pages 11a and 11d
12e	182 Parkview Lane	Refer to page 12b
13a	103 Rosewalk Lane	For Sale - Empty at time of petition signing process
	116 Rosewalk Lane	Renter signed in lieu of owner
	127 Rosewalk Lane	Signature on page 13c
13b	137 Rosewalk Lane	For Sale - Empty at time of petition signing process
	161 Rosewalk Lane	For Sale - Empty at time of petition signing process
13c	127 Rosewalk Lane	Refer to page 13a
14, 15a, 15b, 15c, 15d, 16		NONE
17a	117 Windsor Drive	Refer to page 17b, owner signed and renter signed
17b	117 Windsor Drive	Refer to page 17a

**KINDERTON VILLAGE HOMEOWNERS ASSOCIATION, ADVANCE, NC**

<b>CONDOS / QUADS - PETITION NARRATIVE</b>		
<b>PETITION PAGE</b>	<b>ADDRESS</b>	<b>NARRATIVE</b>
18a	107 Oakwind Drive, #102	Added to printed listing, signatures on page 18d
	107 Oakwind Drive, #201	Signature on page 18c
	113 Oakwind Drive, #101	Signatures on page 18d
	113 Oakwind Drive, #301	Renter's signature (1), owner's signatures (2) on page 18g Counted as one (1) household, three (3) signatures
18b	113 Oakwind Drive, #302	For Sale - Empty at time of petition signing process
	119 Oakwind Drive, #301	Signature on page 18e
	119 Oakwind Drive, #302	Signature on page 18f
	292 Town Park Drive, #102	Signature on page 19c
18c	107 Oakwind Drive, #201	Refer to page 18a
18d	107 Oakwind Drive, #102	Refer to page 18a
18e	119 Oakwind Drive, #301	Refer to page 18b (absentee owner)
18f	119 Oakwind Drive, #302	Refer to page 18b (absentee owner, lives at 179 North Forke Drive in Kinderton Village)
18g	113 Oakwind Drive, #301	Refer to page 18a
19a	304 Town Park Drive, #101	Signatures on page 19d
19b		NONE
19c	292 Town Park Drive, #102	Refer to page 18b (absentee owner)
19d	304 Town Park Drive, #101	Refer to page 19a
20a	140 Pinewood Lane, #102	Signature on page 20f
20b		NONE
20c	149 Pinewood Lane, #104	Renters signed in lieu of owners
	156 Pinewood Lane, #101	For Sale - Empty at time of petition signing process
	156 Pinewood Lane, #103	For Sale - Empty at time of petition signing process
	156 Pinewood Lane, #104	For Sale - Empty at time of petition signing process
20d		NONE
20f	140 Pinewood Lane, #102	Refer to page 20a

**KINDERTON VILLAGE HOMEOWNERS ASSOCIATION, ADVANCE, NC**

<b>TOWN HOMES - PETITION NARRATIVE</b>		
<b>PETITION PAGE</b>	<b>ADDRESS</b>	<b>NARRATIVE</b>
21	174 - 192 Old Towne Drive	NONE - All Town Homes
	189 Old Towne Drive	Single Family, refer to page 11a
	193 Old Towne Drive	Single Family, refer to page 11a

<b>CARRIAGE HOMES- PETITION NARRATIVE</b>		
<b>PETITION PAGE</b>	<b>ADDRESS</b>	<b>NARRATIVE</b>
22		NONE

<b>DEVELOPERS AND BUILDERS - PETITION NARRATIVE</b>		
<b>PETITION PAGE</b>	<b>ADDRESS</b>	<b>NARRATIVE</b>
23	AEA, DEVELOPER	30 platted lots
24	Craig Carter Builder	1 platted lot 1 platted lot with new, unsold, house

**KINDERTON VILLAGE HOMEOWNERS ASSOCIATION, ADVANCE, NC**

<b>KINDERTON VILLAGE HOA MASTER BOARD MEMBERS</b>		
<b>NAME</b>	<b>REPRESENTING</b>	<b>POSITION</b>
Trent Adams	Adams, Egloff and Avant Properties, LLC (Developer / Declarant)	President
Robert Gildea	Condo and Quad Sub-Association	Secretary
Pat Collins	Town Homes Sub-Association	
Bruce Welch	Single Family Sub-Association	Treasurer
Shannon Ragan	CAS, Inc.	Property Management
Wendy Galimore	GMA	Property Management

<b>KINDERTON VILLAGE HOA SUB-ASSOCIATION BOARD MEMBERS</b>		
<b>SUB-ASSOCIATION</b>	<b>NAME</b>	<b>POSITION</b>
Single Family	Todd Kiger	President
	Bruce Welch	Vice President
	Dick Heriot	Secretary
	Pat Russell	Treasurer
	Trent Adams	At-large (Appointed - AEA Properties, LLC)
Condo / Quad	Robert Gildea	President
Town Homes	Pat Collins	President
	Laura Head	Vice President
	Nancy Shelton	Secretary / Treasurer

<b>KINDERTON VILLAGE ANNEXATION COMMITTEE</b>	
<b>NAME</b>	<b>POSITION</b>
Dick Heriot	Committee Chairperson; Secretary, Single Family Sub-Association
Todd Kiger	President, Single Family Sub-Association
Bruce Welch	Single Family representative to Master HOA Board Vice President, Single Family Sub-Association
Robert Gildea	President, Condo / Quad Sub-Association Quad / Condo representative to Master HOA Board
Ken Bateman	Team Leader, Communications Committee
Mike Jenkins	Website support; member of Communications Committee