

**A G E N D A**  
**PRESIDENTS' COUNCIL**  
**November 4, 2021**  
**Meeting Begins at 9:00 a.m.**  
**Clubhouse Four / YouTube Live**

**TO ATTEND:** Shareholders can attend in person at Clubhouse Four.

1. **CALL TO ORDER / PLEDGE OF ALLEGIANCE**
2. **ROLL CALL / INTRODUCTION OF EACH PRESIDENT'S GUEST**
3. **INTRODUCTION OF GUEST(S) AND STAFF:**
  - Susan Hopewell, GRF President
  - Jodi Hopkins, Mutual Administration Director
  - Priscilla Jimenez, Recording Secretary
4. **APPROVAL OF MINUTES FOR MEETING**
  - a. Approval of the Regular meeting minutes of October 7, 2021 **(pp. 1-5)**
5. **MUTUAL ADMINISTRATION DIRECTOR** **Ms. Jodi Hopkins**
  - a. Mutual Administration Monthly Reports **(pp. 6-9)**
  - b. Stock Transfer Monthly Reports **(pp. 10-13)**
6. **COUNCIL BUSINESS**
  - a. **Unfinished Business (n/a)**
  - b. **New Business** **Ms. Jodi Hopkins**
    - i. Discuss the current Co-Occupant Application **(pp. 14-20)**
    - ii. Q&A on STO processes
7. **PRESIDENTS' COMMENTS**
8. **ADJOURNMENT**
  - NEXT MEETING: Thursday, December 2, 2021, at 9:00 a.m. in Clubhouse Four / Zoom

**MINUTES OF THE REGULAR MONTHLY MEETING  
OF THE PRESIDENTS' COUNCIL  
SEAL BEACH LEISURE WORLD  
OCTOBER 7, 2021**

The regular monthly meeting of the Presidents' Council of Seal Beach Leisure World was convened at 9:02 a.m. by President Jackie Dunagan, on Thursday, October 7, 2021, via Clubhouse Four and Zoom Tele-Video Conference.

**MEMBERS PRESENT**

MUTUAL ONE	Ms. Denise Potterton (via Zoom)
MUTUAL TWO	Ms. Peggy Keller (via Zoom)
MUTUAL THREE	Ms. Carol Ginthner (via Zoom)
MUTUAL FOUR	Mr. Mike Levitt
MUTUAL FIVE	Mr. Kevin Powell (M5 Representative; via Zoom)
MUTUAL SIX	Ms. Lynn Baidack (via Zoom)
MUTUAL SEVEN	Ms. Sue Rotter (Arrived at 9:46 a.m.)
MUTUAL EIGHT	Ms. Jeri Dolch
MUTUAL NINE	Ms. Beth Mayer
MUTUAL TEN	Ms. Ruthann Arlart
MUTUAL ELEVEN	Mr. Patrick Henehan (via Zoom)
MUTUAL TWELVE	Mr. Richard Carson (via Zoom)
MUTUAL FOURTEEN	Mr. Lee Melody
MUTUAL FIFTEEN	Ms. Jackie Dunagan
MUTUAL SIXTEEN	Mr. Dale Watkins (via Zoom)
MUTUAL SEVENTEEN	Ms. Cathy Gassman (via Zoom)

**GUESTS**

MUTUAL ONE	Ms. Kathy Almeida (via Zoom)
MUTUAL SIX	Ms. Bunny Boardman (via Zoom)
MUTUAL EIGHT	Ms. Sandy Weisenstein
MUTUAL NINE	Dr. Diane Gruber
MUTUAL TWELVE	Ms. Susan Ferraro (via Zoom)
MUTUAL FOURTEEN	Mr. Bob Stefun
MUTUAL FIFTEEN	Mr. Ron Gildner
MUTUAL SIXTEEN	Ms. Loni Gardette (via Zoom)
MUTUAL SEVENTEEN	Mr. Peter Hayes (via Zoom)

**STAFF**

Ms. Susan Hopewell, GRF President (via Zoom)  
Mr. Randy Ankeny, Executive Director  
Mr. Mark Weaver, Facilities Director  
Ms. Jodi Hopkins, Mutual Administration Director  
Mr. Ruben Gonzalez, Facilities Manager  
Mr. Daniel Fabian, IT Manager  
Ms. Julie Rodgers, Purchasing Manager  
Mr. Seth Iskenderian, IT Technician  
Ms. Priscilla Jimenez, Recording Secretary

**MEMBERS ABSENT**

MUTUAL FIVE

Ms. Linda DeRungs

**INTRODUCTIONS/ANNOUNCEMENTS**

President Jackie Dunagan welcomed guests and staff to the meeting; each President introduced their invited guest from their Board.

**MINUTES**

The regular monthly Council meeting minutes of September 2, 2021 were approved, by the Council, as printed.

**GUEST SPEAKER**

Mr. Daniel Fabian presented a demo on the new Leisure World Seal Beach website.

**Mr. Daniel Fabian and Seth Iskenderian left the meeting at 9:20 a.m.**

**GUEST SPEAKERS**

Mr. Ruben Gonzalez presented the guest speakers from Fenn Pest Control. The representatives of Fenn Pest Control, Bernard and Sonia, acknowledged the concerns of the Council and will act accordingly.

Mr. Randy Ankeny will publish a notice on the newspaper regarding Fenn Pest Control.

**The Fenn Pest Control representatives left the meeting at 10:10 a.m.**

**Mr. Ruben Gonzalez left the meeting at 10:32 a.m.**

**GUEST SPEAKER**

Ms. Julie Rodgers presented an update on appliance availability.

**Ms. Julie Rodgers left the meeting at 10:32 a.m.**

**FACILITIES DIRECTOR**

Mr. Mark Weaver provided an update on ice makers.

**Mr. Mark Weaver left the meeting at 10:32 a.m.**

**MUTUAL ADMINISTRATION**

Ms. Jodi Hopkins provided an update for Mutual Administration monthly reports and Stock Transfer monthly reports.

**EXECUTIVE DIRECTOR**

Mr. Randy Ankeny discussed the interconnected storm drain responsibilities between GRF and Mutuals One through Twelve to Fourteen through Seventeen.

Mr. Randy Ankeny discussed the passage of Senate Bill 502, which changes the elections requirements for Mutuals.

**UNFINISHED BUSINESS**

**Presidents' Seminar**

The Council concurred to hold a Presidents' Seminar in January 2022.

**NEW BUSINESS**

**Returned Payments Fees**

The Council discussed the Returned Payments Fees.

**PRESIDENTS' COMMENTS**

The Presidents offered comments during the proceedings of the meeting.

**ADJOURNMENT**

President Jackie Dunagan adjourned the meeting at 11:07 a.m.

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Attest, Sue Rotter Secretary  
PRESIDENTS' COUNCIL  
pj 10-07-2021

(These are tentative minutes subject to approval by the Presidents' Council at the next regular Presidents' Council meeting.)

**Next Council meeting: Thursday, November 4, 2021, at 9:00 a.m., at Clubhouse Four, Zoom Tele-Video Conference and YouTube LIVE.**



## PRESIDENTS' COUNCIL

### SUMMARY REPORT Thursday, October 7, 2021

Action/Request	Person Responsible
<b>1. Approval of Minutes</b> The regular monthly Council meeting minutes of September 2, 2021 were approved, by the Council, as printed.	Recording Secretary
<b>2. Guest Speaker – Daniel Fabian</b> Mr. Daniel Fabian presented a demo on the new Leisure World Seal Beach website.	IT Manager
<b>3. Guest Speakers – Ruben Gonzalez and Fenn Pest Control</b> Mr. Ruben Gonzalez presented the guest speakers from Fenn Pest Control. The representatives of Fenn Pest Control, Bernard and Sonia, acknowledged the concerns of the Council and will act accordingly.  Mr. Randy Ankeny will publish a notice on the newspaper regarding Fenn Pest Control.	Facilities Manager  Facilities Director  Executive Director
<b>4. Guest Speaker – Julie Rodgers</b> Ms. Julie Rodgers presented an update on appliance availability.	Purchasing Manager
<b>5. Facilities Director – Mark Weaver</b> Mr. Mark Weaver provided an update on ice makers.	Facilities Director
<b>6. Mutual Administration – Jodi Hopkins</b> Ms. Jodi Hopkins provided an update for Mutual Administration monthly reports and Stock Transfer monthly reports.	Mutual Administration Stock Transfer
<b>7. Executive Director – Randy Ankeny</b> Mr. Randy Ankeny discussed the interconnected storm drain responsibilities between GRF and Mutuals One through Twelve to Fourteen through Seventeen.  Mr. Randy Ankeny discussed the passage of Senate Bill 502, which changes the elections requirements for Mutuals.	Executive Director



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## PRESIDENTS' COUNCIL

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Action/Request	Person Responsible
<b>8. Unfinished Business – Presidents' Seminar</b> The Council concurred to hold a Presidents' Seminar in January 2022.	Executive Director  Mutual Administration Director
<b>9. New Business – Returned Payments Fees</b> The Council discussed the Returned Payments Fees.	Executive Director  Mutual Administration Director
<b><u>Presidents' Council Follow-Ups – September</u></b> 1. Approval of Minutes	Recording Secretary

**Mutual Administration**  
**October 2021 - Monthly Reports**  
**RECEPTION**

DEPARTMENTS	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	YTD
ADMINISTRATION	40	40	26	45	25	27	25	55	33	12			328
DESK VISIT	2	4	27	0	0	0	0	1	12	22			68
DISTRIBUTION	13	14	17	12	12	15	10	19	19	23			154
FINANCE	99	92	45	38	28	47	71	61	42	29			552
GOLDEN AGE FOUNDATION	6	16	27	13	8	10	9	8	11	7			115
HEALTH CARE CENTER	20	20	10	25	21	33	26	28	41	33			257
HUMAN RESOURCES	20	29	18	16	27	26	32	32	15	25			240
IT	3	3	6	8	8	5	5	11	3	3			55
LIBRARY	4	13	10	8	8	8	10	22	16	7			106
LW NEWS	24	15	19	31	11	38	18	26	14	32			228
MUTUAL ADMINISTRATION	63	110	121	132	139	135	133	123	127	134			1217
MEMBER RESOURCES	28	54	28	31	11	11	13	22	13	12			223
MISCELLANEOUS	14	27	16	19	15	23	21	24	28	13			200
PHYSICAL PROPERTY	26	32	14	36	45	59	50	64	52	42			420
PURCHASING	14	7	4	6	8	18	11	25	10	10			113
ON SITE SALES	3	4	7	7	8	5	13	8	10	2			67
RECREATION	34	139	72	64	43	40	29	66	22	27			536
RV	2	4	3	2	8	16	6	8	7	6			62
SECURITY	27	33	42	38	34	60	45	57	62	32			430
SERVICE MAINTENANCE	10	11	12	14	30	19	11	20	37	9			173
STOCK TRANSFER OFFICE	98	217	238	138	172	391	341	447	567	451			3060
SUPERWIRE	13	1	9	5	6	11	9	9	15	111			189
TRANSPORTATION	6	17	10	11	23	14	17	22	15	3			138
<b>2021 Totals:</b>	<b>569</b>	<b>902</b>	<b>781</b>	<b>699</b>	<b>690</b>	<b>1011</b>	<b>905</b>	<b>1158</b>	<b>1171</b>	<b>1045</b>	<b>0</b>	<b>0</b>	<b>8,931</b>



**Mutual Administration**  
**October 2021 - Monthly Reports**  
**LETTERS**

MUTUAL	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	YTD
1 One	1	7	6	2	9	7	9	4	17	6			68
2 Two	3	1	5	4	4	3	2	4	11	12			49
3 Three	13	3	5	7	2	9	6	2	114	1			162
4 Four	4	2	2	0	6	2	4	3	11	3			37
5 Five	24	5	12	5	4	13	3	21	14	6			107
6 Six	2	6	4	22	12	5	0	7	5	5			68
7 Seven	0	2	0	4	4	3	9	0	6	2			30
8 Eight	3	1	2	2	5	8	8	4	4	6			43
9 Nine	23	5	4	8	2	1	7	8	14	11			83
10 Ten	4	5	0	2	5	0	4	3	11	7			41
11 Eleven	5	6	10	5	4	6	4	9	21	7			77
12 Twelve	2	5	4	6	3	2	4	5	11	18			60
14 Fourteen	10	3	4	4	5	1	8	3	4	14			56
15 Fifteen	2	5	1	4	7	4	1	6	9	1			40
16 Sixteen	2	1	0	0	2	0	0	3	2	4			14
17 Seventeen	3	6	0	2	1	0	0	0	6	3			21
<b>2021 Totals:</b>	<b>101</b>	<b>63</b>	<b>59</b>	<b>77</b>	<b>75</b>	<b>64</b>	<b>69</b>	<b>82</b>	<b>260</b>	<b>106</b>			<b>956</b>
<b>2020 Totals:</b>	<b>174</b>	<b>219</b>	<b>110</b>	<b>44</b>	<b>93</b>	<b>66</b>	<b>48</b>	<b>62</b>	<b>52</b>	<b>185</b>	<b>333</b>	<b>105</b>	<b>1,491</b>
<b>Legal</b>	<b>66</b>	<b>58</b>	<b>54</b>	<b>60</b>	<b>62</b>	<b>61</b>	<b>60</b>	<b>57</b>	<b>70</b>	<b>69</b>			
<b>Insurance</b>	<b>5</b>	<b>5</b>	<b>3</b>	<b>5</b>	<b>5</b>	<b>4</b>	<b>4</b>	<b>4</b>	<b>4</b>	<b>4</b>			



**Mutual Administration**  
October 2021 - Monthly Reports

**COLLECTIONS (Delinquent Accounts, Legal Fees)**

MUTUAL	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	YTD
One	\$6,088	\$4,967	\$2,820	\$710	\$3,091	\$710	\$10,374	\$2,080	\$3,407	\$1,971			\$36,220
Two	\$2,062	\$0	\$1,388	\$3,087	\$17,167	\$2,047	\$1,060	\$2,442	\$4,234	\$2,007			\$35,493
Three	\$1,084	\$0	\$0	\$637	\$1,167	\$2,891	\$1,846	\$2,391	\$2,319	\$1,800			\$14,135
Four	\$2,434	\$6,998	\$608	\$0	\$0	\$0	\$578	\$578	\$4,735	\$0			\$15,930
Five	\$4,543	\$5,544	\$548	\$0	\$3,145	\$3,277	\$1,714	\$3,796	\$4,044	\$7,768			\$34,380
Six	\$2,156	\$620	\$613	\$1,778	\$1,797	\$650	\$375	\$2,676	\$1,697	\$1,772			\$14,133
Seven	\$0	\$3,369	\$5,024	\$4,199	\$650	\$201,247	\$2,231	\$1,171	\$1,796	\$1,728			\$221,416
Eight	\$1,770	\$0	\$0	\$1,634	\$2,890	\$50,471	\$2,343	\$1,071	\$2,139	\$2,999			\$65,317
Nine	\$2,534	\$5,046	\$2,745	\$536	\$1,772	\$1,720	\$2,641	\$600	\$2,572	\$1,148			\$21,314
Ten	\$1,986	\$1,912	\$2,009	\$2,048	\$2,620	\$1,133	\$618	\$1,153	\$1,153	\$1,153			\$15,786
Eleven	\$0	\$1,882	\$501	\$1,082	\$1,072	\$638	\$0	\$1,761	\$2,475	\$2,319			\$11,730
Twelve	\$1,099	\$4,212	\$2,852	\$1,139	\$1,780	\$1,780	\$682	\$1,727	\$2,891	\$2,413			\$20,576
Fourteen	\$82	\$459	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$540
Fifteen	\$0	\$3,121	\$1,666	\$1,666	\$4,133	\$0	\$2,900	\$5,091	\$4,304	\$3,107			\$25,990
Sixteen	\$115	\$689	\$1,342	\$1,552	\$0	\$0	\$0	\$0	\$0	\$552			\$4,250
Seventeen	\$47	\$1,741	\$1,279	\$1,439	\$460	\$3,468	\$0	\$419	\$1,645	\$839			\$11,338
COLLECTED:	\$26,000	\$40,561	\$23,396	\$21,506	\$41,743	\$270,032	\$27,363	\$26,958	\$39,411	N/A	N/A	N/A	\$548,548
2020 Collections	\$49,260	\$36,631	\$32,453	\$38,670	\$17,267	\$67,739	\$41,279	\$48,617	\$22,433	\$31,577			\$385,926

**Collections through 2021: \$548,548.12**

## MEMBER RESOURCES & ASSISTANCE LIAISON

October 2021

MUTUAL		NEW CASES	CLOSED CASES	HOME VISITS	OFFICE VISITS	CALLS	COUNTY REPORTS	RESOURCE INFORMATION	SELF-REFERRAL	MUTUAL REFERRAL
1	One	3	3	0	9	29	1	17	0	1
2	Two	0	2	0	7	19	0	5	0	2
3	Three	0	2	0	4	14	0	10	0	1
4	Four	2	0		3	9	0	3	0	2
5	Five	2	2	1	6	20	1	10	1	3
6	Six	0	0	0	5	2	0	4	0	0
7	Seven	0	2	0	4	22	1	8	0	2
8	Eight	0	0	0	1	5	0	1	0	0
9	Nine	0	0	0	0	5	0	2	0	0
10	Ten	2	0	0	2	7	2	3	0	0
11	Eleven	1	2	0	4	11	0	3	0	0
12	Twelve	0	0	0	3	8	0	3	0	0
14	Fourteen	0	0	0	1	3	0	2	0	0
15	Fifteen	0	0	0	4	11	0	9	0	0
16	Sixteen	0	0	0	0	1	0	1	0	0
17	Seventeen	0	0	0	0	1	0	1	0	1
Totals:		10	13	1	53	167	5	82	1	12

Cases of Food Delivered:	228
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### Projects:

- Collaboration Project – APS, Alzheimer's OC, Council on Aging: working on structure of programs, vision, mission statement, workflow, etc.,
- *Final Details - Guide for Survivors When Death of Spouse/Significant Other* - Researched, updated, formatted & printed out information for a new handout.
- Continued cleaning up No Show Food Bank report. Emailed Esther & Hai about the cancels
- Congresswoman Michelle Steel – Oct 22 Resources Fair - Member Resources had a booth
- Working on Presentation of the Collaboration Project for GRF Admin Committee Meeting
- Working on Presentation for upcoming Sunshine Club Zoom Meeting in Nov.
- 44 Shuttle Bus Applications processed for October
- Cadence Hospice Brainstroming for collaboration on a *Music Therapy/companion care program* – Khyla Hislop & Evyn McGraw
- Final touches to Resource Booklet project. Ready for review and roll out – emailed to Randy

### Education/Event Planning for 2022 - beginning to plan for 2022

- In talks with Jennifer Carroll about a possible Chef Demo
- In talks with Pacific Hospice and Geiss Med about do vital screenings throughout the year
- In talks with Lisa Colavita w/Care Plus – to get the Matter of Balance Program on the LW schedule for in the near future.

### Resource Development:

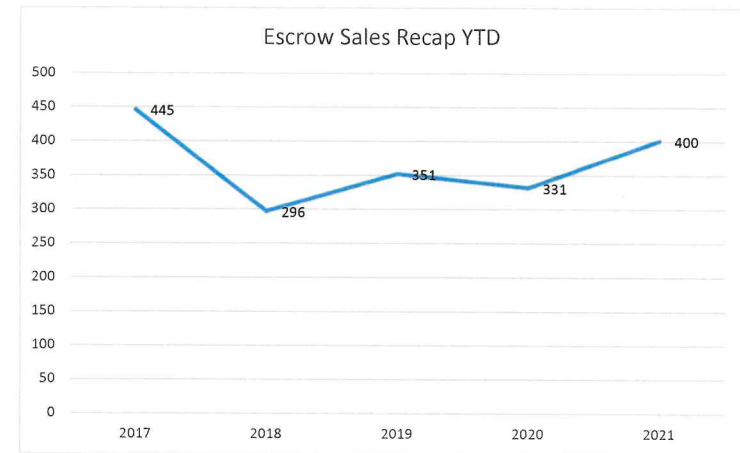
- Oakmont Senior Living AL – Jennifer Carroll
- Council on Aging – Susan Paperi & Marilyn Fedorow -Gerintologist Concierge Care Navigators Program (excellent catch all program)
- Pop In Care -caregivers (for lower income no minimum hrs) – Teri Frianeza
- Linda Armas, Clear Choice Senior Services – Placement Agent
- Pathways – Kaitlyn Wood client coordinator, case management
- Pacific Hospice, LLC – Stela Avila (does free vitals screening – possibility of small event meet w/Grecia)
- Bixby Knolls Assisted Living – Salvador
- Reconnect LW with Safety First personal emergency response systems – Ann Smith
- Congresswoman Michelle Steel and Austin Mejia
- Ron Kong – Gilbert House of Joy Board & Care Assisted Living
- Regina Butler – Geiss Med- House call (Psych) nurse Practitioner
- Silverado Dementia Hospice- Minnie Domingo - also Emergency Hospice
- Care Plus Home Health, nursing service, Hospice – Lisa Colavita (Matter of Balance Program)
- Cadence Hospice - Khyla Hislop & Evyn McGraw



# **Stock Transfer** **October 2021 - Monthly Reports**

## **ESCROW**

MUTUAL		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	YTD
1	One	1	6	5	3	4	5	4	6	3	3			40
2	Two	5	4	5	7	4	10	6	10	5	5			61
3	Three	2	1	3	5	1	8	1	2	5	2			30
4	Four	2	1	0	4	1	0	1	3	0	5			17
5	Five	4	4	6	4	2	3	4	3	0	5			35
6	Six	1	2	2	1	3	1	3	2	6	1			22
7	Seven	2	0	1	4	1	4	5	2	3	4			26
8	Eight	2	3	5	3	3	4	4	2	1	2			29
9	Nine	1	1	2	2	2	1	3	3	3	0			18
10	Ten	1	2	1	2	5	2	1	2	1	3			20
11	Eleven	1	2	3	6	3	5	2	1	1	1			25
12	Twelve	1	0	3	5	3	4	3	0	1	4			24
14	Fourteen	0	1	2	2	1	3	4	3	2	1			19
15	Fifteen	1	2	4	1	1	6	2	3	5	0			25
16	Sixteen	0	0	0	0	0	1	1	1	0	0			3
17	Seventeen	1	0	0	1	1	0	1	0	0	2			6
TOTALS:		25	29	42	50	35	57	45	43	36	38			400
MLS Active Listings at time of report		74	44	38	37	22	18	21	15	28	32			



ESCROW RECAP	SALES		YTD Percentage Comparisons			Avg Price Per Home	Price % Change Per Year
	Sales	Prices		Sales	Prices		
Total through October 2021	400	\$ 112,188,746	2021	2017-2021		\$ 280,472	11.42%
Total Through October 2020	331	\$ 83,321,458	2020	21%	35%	\$ 251,726	7.97%
Total through October 2019	351	\$ 81,833,978	2019	-6%	2%	\$ 233,145	-12.28%
Total through October 2018	296	\$ 78,668,898	2018	19%	4%	\$ 265,773	12.43%
Total through October 2017	445	\$ 105,193,137	2017	-33%	-25%	\$ 236,389	

**Stock Transfer**  
**October 2021 - Monthly Reports**

**ATTORNEY TRUST REVIEWS**

MUTUAL		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	YTD
1	One	1	1	2	3	1	4	1	4	2	2			21
2	Two	2	2	5	2	5	6	3	1	1	4			31
3	Three	4	3	2	0	1	0	1	1	0	2			14
4	Four	1	1	1	2	1	2	0	0	2	3			13
5	Five	1	0	1	2	2	1	2	6	1	1			17
6	Six	0	0	0	3	2	0	1	1	1	2			10
7	Seven	0	0	3	1	1	1	1	2	1	0			10
8	Eight	1	2	2	2	6	0	2	2	0	1			18
9	Nine	1	1	2	2	0	0	1	1	0	0			8
10	Ten	1	0	2	2	1	2	1	0	2	4			15
11	Eleven	1	1	1	1	0	1	0	2	1	1			9
12	Twelve	3	3	2	2	0	1	0	3	1	1			16
14	Fourteen	0	2	1	3	4	4	1	1	3	3			22
15	Fifteen	1	1	4	1	0	3	1	1	2	3			17
16	Sixteen	0	0	0	1	2	0	0	0	0	0			3
17	Seventeen	1	0	2	2	3	0	2	0	0	2			12
Totals:		18	17	30	29	29	25	17	25	17	29	0	0	236

Trust Reviews through October 2021:	236	21.03%
Trust Reviews through October 2020:	195	

# Stock Transfer

## October 2021 - Monthly Reports

### REGISTRATIONS

MUTUAL		CAREGIVERS	DOGS	CATS	OTHERS	SERVICE	ESA
1	One	35	87	44	4	1	17
2	Two	53	98	59	5	1	12
3	Three	43	77	24	2	1	7
4	Four	21	45	29	0	1	6
5	Five	28	51	22	1	0	13
6	Six	32	71	28	0	0	5
7	Seven	21	54	31	0	0	5
8	Eight	14	49	15	1	0	9
9	Nine	40	73	20	2	1	6
10	Ten	16	34	14	1	0	3
11	Eleven	13	30	9	0	0	1
12	Twelve	44	61	30	0	1	14
14	Fourteen	25	41	17	3	2	2
15	Fifteen	36	66	30	7	0	7
16	Sixteen	0	5	8	0	0	1
17	Seventeen	15	9	2	2	0	1
Totals:		436	851	382	28	8	109

Total Pets & Animals:	<b>1,378</b>
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## Stock Transfer October 2021 - Monthly Reports

### TRANSFERS

TYPE OF TRANSFER	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	YTD
SIMPLE TRANSFERS	14	28	15		6	10	27	16	10	11			137
MEMBERSHIP TRANSFERS	2	9	7		0	3	13	9	3	4			50
Totals:	16	37	22	0	6	13	40	25	13	15	0	0	187

Simple Transfers include name changes, adding or removing of nonresident co-owners, and removal of owner members.

Membership Transfers are the addition of new owner members on title.



## Application & Approval Co-Occupant

Mu. / Unit # \_\_\_\_\_

The following signed documents pertain to an application by a Shareholder-Members to seek approval by the Mutual Board to include a Co-Occupant in the residency of their unit. Note: A Co-Occupant has no ownership rights in the Leisure World unit. Please fill out the following attached documents:

- |   |           |
|---|-----------|
| <input type="checkbox"/> Sign Cover Sheet Disclosure  | Pages 1-2 |
| <input type="checkbox"/> Co-Occupant Application Form | Pages 3-4 |
| <input type="checkbox"/> Co-Occupant Agreement        | Pages 5-7 |

Shareholder-Member Name: \_\_\_\_\_

Shareholder-Member Name: \_\_\_\_\_

Co-Occupant's Name: \_\_\_\_\_

**Amenities Fee \$4,127 and Setup Fee \$100.00** is paid: Receipt # \_\_\_\_\_

ID Card Received: \_\_\_\_\_ Date: \_\_\_\_\_ Staff: \_\_\_\_\_

Important! Please Sign: The Proposed Co-Occupant understands and agrees that the Shareholder-Members must be residing in the Unit full-time with the Co-Occupant and that the Co-Occupant has no rights of residency unless the Shareholder-Members are residing in the Unit full-time.

X \_\_\_\_\_ Date: \_\_\_\_\_  
Co-Occupant Signature

X \_\_\_\_\_ Date: \_\_\_\_\_  
Shareholder-Member Signature

X \_\_\_\_\_ Date: \_\_\_\_\_  
Shareholder-Member Signature

Co-Occupant Initials: \_\_\_\_\_

**APPROVED BY SEAL BEACH MUTUAL NO \_\_\_\_\_**

By: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

**RECEIVED BY GOLDEN RAIN FOUNDATION**

By: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

**TERMS USED IN THIS FORM:**

**Shareholder – A person who owns one share of Mutual Corporation stock in Leisure Worlds Seal Beach, Mutuals 1 to 16, and lives in the Mutual as a resident. This form does not apply to Mutual 17. This term was originally defined in the Mutual Bylaws. “ARTICLE X. FISCAL MANAGEMENT. Section 7. Miscellaneous. That in the By-Laws of this corporation, the term “member” and “Shareholder” are used interchangeably and shall have the same meaning and refer to those individuals owning the shares of stock of this corporation.”**

**Member – A person who is a member of the Golden Rain Foundation (GRF). Only resident Shareholders can become members of the GRF. Non-resident co-owners (NRCO) are NOT members of the GRF and cannot request co-occupant approval for the unit. This term is defined in the GRF-BYLAWS ARTICLE II. Membership, SECTION III.**

**Shareholder-Member – A person who is a Shareholder and a Member of the GRF.**

Co-Occupant Initials: \_\_\_\_\_

**Co-Occupant Application**Golden Rain Foundation  
Stock Transfer OfficeMutual/Unit: \_\_\_\_\_**Confidential Information  
Maintained in GRF Corporate File**

<b>Last Name</b>	<b>First Name</b>	<b>Middle Initial</b>
<b>Date of Birth</b>	<b>City and State of Birth</b>	<b>Male</b> <input type="checkbox"/> <b>Female</b> <input type="checkbox"/> <b>Other</b> <input type="checkbox"/>
<b>Married</b> <input type="checkbox"/> <b>Divorced</b> <input type="checkbox"/> <b>Single</b> <input type="checkbox"/> <b>Widow</b> <input type="checkbox"/> <b>Widower</b> <input type="checkbox"/> <b>Domestic Partner</b> <input type="checkbox"/>		<b>Retired: Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/>
	<b>If not retired, Current Occupation</b>	<b>Relationship to Shareholder- Members</b>

<b>Home Phone</b> (      )	<b>E-Mail Address</b>
<b>Cell Phone</b> (      )	

<b>IMPORTANT: NEXT-OF-KIN OR EMERGENCY CONTACT INFORMATION</b>		
<b>Name</b>	<b>Address</b>	<b>Relationship</b>
<b>Home Phone</b> (      )	<b>Work Phone</b> (      )	<b>Cell Phone</b> (      )

**PLEASE ATTACH A COPY OF GOVERNMENT ISSUED PHOTO ID FOR PROOF OF AGE**

Does the Co-Occupant have an expectation of ownership interest in the Shareholder-Members' Unit? \_\_\_\_\_

**If yes, please describe your inheritance interest and attach any legal documents which support your future right of inheritance such as a Certification of Trust, Court Order or other.**

\_\_\_\_\_

\_\_\_\_\_

We hereby certify and declare under penalty of perjury, that the foregoing information is true and correct.

Date this \_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_, at Leisure World Seal Beach.

\_\_\_\_\_  
Shareholder-Member Signature

\_\_\_\_\_  
date

\_\_\_\_\_  
Shareholder-Member Signature

\_\_\_\_\_  
date

\_\_\_\_\_  
Co-Occupant's Signature

\_\_\_\_\_  
date

**Co-Occupant Agreement**

Mutual & Unit: \_\_\_\_\_

This **“AGREEMENT”** made and entered into this \_\_\_\_ day of \_\_\_\_, 20\_\_\_\_ by and between Seal Beach Mutual No. \_\_\_\_ (hereinafter referred to as the **“CORPORATION”**, a Corporation having its principle office and place of business in Orange County, CA, and the Shareholder-Member: \_\_\_\_\_  
Shareholder-Member: \_\_\_\_\_ and the Co-Occupant: \_\_\_\_\_.

**WHEREAS**, the corporation was formed for the purpose of acquiring, owning and operating a cooperative housing project to be located at Leisure World Seal Beach, Seal Beach, Orange County, California, with the intent that its stockholders (Shareholder-Members) shall have the right to occupy the dwelling units thereof under the terms and conditions set forth in the Occupancy Agreement; and

**WHEREAS**, the Shareholder-Members are the owner and holder of one share of common capital stock, Series \_\_\_\_ of the Corporation and have a bona fide intention to reside in the project, and the Co-Occupant is qualified as a senior citizen pursuant to Civil Code 51.3 (C) (2).

**NOW THEREFORE**, in consideration of the Mutual, promises contained herein, the Corporation hereby consents to the Co-Occupant residing with the Shareholder-Members in Unit No. \_\_\_\_, Seal Beach Mutual No. \_\_\_\_, located at Leisure World.

**ARTICLE 1. CHARGES**

The Shareholder-Members hereby covenant and agrees to pay the Golden Rain Foundation an amount equal to the then current Amenities Fee payable in the same amount as is required of all Shareholder-Members at Leisure World.

**ARTICLE 2. CARRYING CHARGES**

The Co-Occupant acknowledges, covenants and agrees that in order to maintain residence with the Shareholder-Members that it is necessary that all monthly carrying charges as set forth in Article 1 of the Occupancy Agreement between the Corporation and the Shareholder-Members be paid.

**ARTICLE 3. OCCUPANCY AGREEMENT**

The Co-Occupant acknowledges reading the Occupancy Agreement existent between the Corporation and the Shareholder-Members and agrees to be bound by all of the terms and provisions therein contained as to residency, and the fact that said apartment is to be used for residential purposes only.

Co-Occupant Initials: \_\_\_\_\_

The Co-Occupant agrees and acknowledges that the Co-Occupant, in order to maintain residence, is jointly liable with the Shareholder-Members for all such charges related to the Seal Beach Mutual unit being occupied.

**ARTICLE 4.**

The Co-Occupant agrees that no right held by the Co-Occupant to reside with the Shareholder-Members may be assigned nor transferred to any other person and that no immediate or collateral family member in any relationship with the Co-Occupant will be allowed to reside with the Co-Occupant.

**ARTICLE 5.**

The Co-Occupant is entitled to use any and all of the facilities furnished and provided for Members of the Foundation at Leisure World and the Co-Occupant shall be entitled to enjoy said facilities together with the right of Occupancy with the Shareholder-Members.

**ARTICLE 6.**

The Co-Occupant covenants and agrees that he/she will comply with any and all pertinent corporate regulations, bylaws, and rules of the Corporation and Foundation related to occupancy and will endeavor with the Shareholder-Members to cooperate with the other residents to bring about, for all residents of the Seal Beach Mutual in which the apartment is located, a high standard of home and community conditions. The Co-Occupant acknowledges, that by his/her acts and actions that if the occupancy is detrimental to the peace, quiet and enjoyment of the Seal Beach Leisure World community, that the same may result in the eviction of the Shareholder-Members and the Co-Occupant, and that there exists between the Shareholder-Members and the Corporation, a Landlord-Tenant relationship. The Co-Occupant acknowledges that he/she may be requested to leave the project or be evicted in the event said individual ceases to be qualified pursuant to the provisions of California Civil Code 51.3 (2) (B).

**FURTHER:** The Co-Occupant covenants and agrees that he/she has, pursuant to Civil Code, **NO RIGHT** to continue residence in the event of death, dissolution of marriage, upon hospitalization or other prolonged absence of the Shareholder-Members.



Co-Occupant Initials: \_\_\_\_\_

**ARTICLE 7.**

Co-Occupant understands that though they have an ID card for use of the community facilities, Co-Occupant may not attend monthly or Annual Mutual Shareholder-Member Meetings, or hold office, or participate in any governing process of the Mutual Corporation in which they reside or of the Golden Rain Foundation

\_\_\_\_\_  
Shareholder-Member Signature

\_\_\_\_\_  
date

\_\_\_\_\_  
Shareholder-Member Signature

\_\_\_\_\_  
date

\_\_\_\_\_  
Co-Occupant's Signature

\_\_\_\_\_  
date

Co-Occupant Initials: \_\_\_\_\_

**Return this form to the Stock Transfer Office.**  
If you require additional forms, contact Stock Transfer at (562) 431-6586, ext. 339, 347, or 348.  
**Golden Rain Foundation Seal Beach, California**