

Seabreeze Management Company, Inc.
Annual Management Disclosure Statement

In accordance with California Business & Professions Code § 11504 and Civil Code § 5375, the following information is provided regarding your manager's certification status and Seabreeze's certifications and statuses:

- Your manager does not receive a referral fee or other monetary benefit from a 3rd party provider for distributing your budget packet to the membership.
- The location of the Seabreeze principal office is 26840 Aliso Viejo Parkway, Suite 100, Aliso Viejo, CA, 92656.
- The fidelity insurance of the management firm does not cover the operating and reserve funds of your association. Your association fidelity insurance policy provides coverage for the funds.
- Seabreeze Management Company, Inc. is privately held, and its business address is 26840 Aliso Viejo Parkway, Suite 100, Aliso Viejo, CA 92656.
- Neither Seabreeze, nor your manager, have any ownership interests, profit-sharing arrangements, or other monetary incentives from another business or company.
- Seabreeze's Operating CEO, but not your manager, has an ownership interest in SMC Maintenance Company, Inc. (SMC) which provides maintenance services to some Seabreeze clients.
- The Operating CEO, Isaiah Henry, does not hold any licenses relevant to architectural design, construction, engineering, real estate, or accounting as issued by the State of California, and currently holds the designation of AMS® as noted below. His AMS® certification is current and expires on August 1, 2026.
- We acknowledge that any disclosures made on your behalf for the purposes of assisting with an escrow or providing information for your association's budget are the property of the association and not any Seabreeze agents or our firm.

Disclosure: Isaiah Henry is the owner of Seabreeze Management, Inc., which provides management and maintenance services to community associations. Pursuant to California Civil Code 5375, the following licenses and certifications are held by the directors or officers of Seabreeze Management Company, Inc.:

1. Association Management Specialist (AMS®) issued by Community Associations Institute (CAI) expiring on 8/1/2026.
2. Accredited Association Management Company (AAMC®) issued by Community Associations Institute (CAI) expiring on 8/1/2026.
3. The name and address of any shareholder holding greater than 10% of the shares in Seabreeze are as follows:

Isaiah Henry, CEO
26840 Aliso Viejo Parkway, Suite 100
Aliso Viejo, CA 92656

As a benefit to its clients, Seabreeze may engage in agreements with third-parties to help subsidize, reduce or eliminate costs normally incurred by the Association. Seabreeze has various affiliations and business arrangements, including certain financial institutions ("Partner Institutions") with which Seabreeze has established partnerships intended to secure the provision of reliable and cost-efficient banking services for Seabreeze's client associations. Under depository services agreements with the Partner Institutions, in consideration for the maintenance of deposits by



BAY AREA
COACHELLA VALLEY
INLAND EMPIRE
LAS VEGAS
LOS ANGELES
ORANGE COUNTY
SAN DIEGO

Seabreeze's clients, the Partner Institution agrees to provide depository and commercial banking services to Seabreeze's clients without charge and also provides the Seabreeze with cost renumeration for any additional account maintenance costs incurred by Seabreeze (i.e. deposit processing, transaction reconciliations, exception processing, software integrations, etc.).

Seabreeze or its affiliates may earn a profit as a result of operating purchasing plans and programs, the purpose of which is to provide price and quality benefits to the Association and/or its residents. Purchase of any product and/or service which is part of any program or marketing plan operated by Seabreeze or its affiliates is voluntary and is not in any manner required by the provisions of this Agreement.

Seabreeze or its affiliates may receive fees from vendors in exchange for Seabreeze's dissemination of marketing information about such vendors to Seabreeze's managed associations (including the Association) and their residents.

The professional association(s) that certified the common interest development managers and Seabreeze Management Company, Inc. are as follows:

Accredited Association Management Company (AAMC®)

Seabreeze Management Company, Inc. is an Accredited Association Management Company, a credential earned from the Community Associations Institute (CAI). The accreditation requires the management company to have at least three (3) years of experience in community association management and at least 50% of its managers must have earned professional designations.

Certified Manager of Community Associations (CMCA®)

Requires the manager to pass a prerequisite class and/or provide proof of five (5) years of community management experience, then to pass a written exam. Community Association Managers International Certification Board (CAM-ICB) is the professional association that certifies this designation and their address is: 6402 Arlington Blvd., #510; Falls Church, VA 22042. Their phone number is 703-970-9300.

Association Management Specialist (AMS®)

Requires the manager to have a CMCA®, have at least two (2) years of verified association management experience, and completion of at least two (2) mid-level Professional Management Development Program (PMDP) courses. Community Associations Institute (CAI) is the professional association that certifies this designation and their address is; 6402 Arlington Blvd #500; Falls Church, VA 22042. Their phone number is 703-970-9220.

Professional Community Association Manager (PCAM®)

Requires the manager to have five (5) years of direct community association management experience, all six (6) M-200 level courses, must have passed the CMCA exam as well as the PCAM case study. Community Associations Institute (CAI) is the professional association that certifies this designation and their address is; 6402 Arlington Blvd #500; Falls Church, VA 22042. Their phone number is 703-970-9220.

Large Scale Manager (LSM®)

Requires the manager to have an active PCAM designation and ten (10) years of community association management experience, including five (5) years as a large-scale manager and must complete the CAI Large-Scale Managers Workshop or M-340 course. Community Associations Institute (CAI) is the professional association that certifies this designation and their address is; 6402 Arlington Blvd #500; Falls Church, VA 22042. Their phone number is 703-970-9220.

Certified Community Association Manager (CCAM®)

California Association of Community Managers (CACM) is the professional association that certifies this designation and their address is: 23461 South Pointe Drive, Suite 200; Laguna Hills, CA 92653. Their phone number is 949-916-2226.

The attached list reflects the Seabreeze Community Manager, Senior Community Manager, Director, General Manager, On-Site Manager, Vice President, and Senior Vice President staff members along with their respective certifications.

Employee Name	Designation	Date(s) of Certification	Renewal(s)	Real Estate License	Employee Name	Designation	Date(s) of Certification	Renewal(s)	Real Estate License
Alan Fowlie				No	Kasia Hayes	CMCA	9/28/2024	10/1/2025	No
Alexander Karamian				Yes	Kathy Davis Guarenas				Yes
Alexandria Garcia-Rosewood	CMCA AMS	9/1/2019 8/11/2020	10/1/2025 8/1/2026	No	Katie Liang				No
Alexa Gomez	CCAM CMCA AMS	1/15/2025 8/17/2021 6/7/2022	1/15/2028 4/1/2026 9/1/2025	No	Kaylene La Framboise				No
Alisa Toolson	CMCA AMS	6/2/2010 6/20/2012	10/1/2025 4/1/2026	No	Kimberly Dunfee	CCAM	8/15/2024	8/15/2027	No
Alyse Viramontes				No	Kim Harrison				No
Alysia Dale-Broughton	CMCA CCAM	12/1/2023 9/22/2022	10/1/2025 9/1/2025	No	Kim Horner				No
Amanda Barry				No	Kimberly Pollard	CMCA AMS	5/5/2017 7/9/2017	10/1/2025 8/1/2027	No
Amar Gupta	CMCA AMS	7/12/2024 7/23/2024	10/1/2026 8/1/2027	No	Komal Gill	CCAM	8/31/2023	8/31/2026	No
Amber Cordova	CMCA	3/8/2023	4/1/2027	No	Kristy Towry				No
Andrea Hoff				No	Kyle Bodyfelt	CMCA AMS	3/10/2022 3/5/2024	3/31/2026 8/1/2027	No
Andrea Thrower				No	Lana McGowan	CMCA	10/2023	10/1/2027	No
Andy Aguinaga				No	Lauren Donovan	CMCA AMS	5/1/2016 4/1/2017	4/1/2026 8/1/2026	No
Andy Larkin	CMCA AMS	10/28/2011 8/11/2020	10/1/2025 8/1/2027	No	Lee Crowell	CMCA	6/8/2014	4/1/2026	No
Angelic Luna	AMS	8/23/2024	8/1/2027	No	Leonel Quezada				No
Ankur Patel	CMCA AMS	8/1/2016 8/18/2021	10/1/2026 8/1/2027	No	Linda Keefer				No
Anna Machado	CMCA AMS PCAM	1/24/2018 9/27/2018 6/16/2021	4/1/2026 8/1/2027 8/1/2027	No	Lindsey Elizondo	CMCA	12/9/2024	10/1/2025	No
Anthony Corcoran	CMCA AMS	3/9/2023 3/10/2025	4/1/2027 8/1/2028	No	Liz Sulli				No
Anthony Rosales				No	Liz Juarez				No
Argie Joy Breden				No	Mai-Lahn Smith	CMCA	4/1/2023	4/1/2027	No
Ashley Coleman				No	Mandy Munoz	CCAM	6/30/2022	6/30/2028	No
Brad Collins	CMCA AMS	12/12/2022 4/10/2023	10/1/2026 8/1/2026	Yes	Marcos Huerta	CCAM	7/20/2023	7/20/2026	No
Brandon Chen	CMCA AMS PCAM	2/10/2015 2/27/2020 2/20/2024	4/1/2026 8/1/2027 8/1/2027	Yes	Maria Lelea	CCAM	2/27/2020	2/27/2026	Yes
Brandon Tryon	AMS	9/2/2016	8/1/2026	No	Mariana Chen Marquez				No
Brian Salas	CMCA AMS	8/25/2023 2/29/2024	10/1/2025 8/1/2027	No	Marke Briones				No
Brittany Duran	CMCA	5/26/2017	4/1/2026	No	Mark Harrison				No
Brittany Kitts	CMCA AMS	7/19/2018 7/17/2019	10/1/2026 8/1/2028	No	Marybeth O. Green	CMCA AMS PCAM CCAM	9/11/2014 5/16/2018 2/26/2021 9/24/1997	10/1/2025 8/1/2027 8/1/2027 3/31/2026	No
Carolina Callao				No	Matthew Quinn				No
Cassie Galuppo				No	Melinda Tait	CMCA AMS	12/4/2019 3/11/2021	10/1/2025 8/1/2027	No
Cecilia de Heras	CMCA AMS	11/30/2020 4/5/2021	10/1/2025 9/30/2025	Yes	Melissa Sanchez	CMCA	4/12/2021	4/1/2027	No
Charnay Scrivner				No	Michael Canning				No
Chelia Rubalcava				No	Michelle Estrada				No

Employee Name	Designation	Date(s) of Certification	Renewal(s)	Real Estate License	Employee Name	Designation	Date(s) of Certification	Renewal(s)	Real Estate License
Chelsey Chapman	CMCA AMS	9/24/2014 8/15/2019	10/1/2026 8/1/2028	No	Miguel Corona	CCAM	7/11/2024	7/11/2027	No
Cheri Leal	CMCA AMS	12/21/2004 1/16/2008	4/1/2026 8/1/2026	No	Miste Holloway				No
Cherri Mazzone				No	Molly Schessow	CCAM	5/8/2020	5/8/2026	No
Christian Chavez	CMCA	1/26/2024	4/1/2026	No	Monica Garcia	CMCA AMS	5/20/2022 7/15/2024	4/1/2026 8/1/2027	No
Christian Ramirez				No	Monique Allison				No
Christie Villarreal				No	My-Le Barnhart				No
Christy Masterson	CCAM	2/27/2022	12/31/2027	No	Nadine Bell				No
Clint Warrell	CMCA AMS LSM PCAM	7/1/1996 11/1/1994 2/13/2002 10/29/1998	10/1/2026 8/1/2027 8/1/2026 8/1/2027	No	Natascha Hoover	CMCA AMS	3/3/2023 7/27/2023	3/31/2026 7/1/2027	Yes
Colette Marcelle	CMCA CCAM	11/4/2021 9/6/2024	10/1/2025 9/6/2027	No	Ned Heiskell	PCAM	10/1/1992	8/1/2026	No
Colton Salinger	CMCA AMS	5/1/2015 12/8/2017	4/1/2026 8/1/2026	No	Nelly Penalonzo	CMCA AMS	8/18/2023 9/12/2023	10/1/2025 8/1/2027	No
Coral Oghoghorie				No	Nichole Gonzales				No
Courtney Ekeberg	CMCA	1/17/2014	4/1/2026	No	Nicole Buendia	AMS	04/06/2022	8/1/2028	Yes
Courtney Chastain	CMCA AMS	10/20/2017 5/4/2018	4/1/2027 8/1/2027	Yes	Nicole Wade	AMS	7/18/2025	8/1/2028	No
Craig Pico				No	Norma Fowler				No
Crystal Valencia	CMCA AMS	11/20/2019 2/15/2020	4/1/2026 8/1/2026	No	Pamela Rottner	CMCA AMS PCAM	11/12/2010 12/20/2010 1/31/2012	10/1/2026 8/1/2027 8/1/2027	No
Daniel Cho				No	Patti Byrne				No
Darren Zetena	CCAM	4/4/2024	4/4/2027	No	Patricia Terry				No
David Fisher	CMCA	3/3/2025	4/1/2027	No	Patty Olson	CMCA AMS PCAM	10/2023 8/1/2024 8/1/2024	10/1/2025 8/1/2027 8/1/2027	No
Dawn Suskin	CCAM AMS PCAM	10/22/2010 02/03/2025 4/16/2016	10/1/2027 8/1/2028 8/1/2026	No	Polly McDonald				No
Debi Cole				No	Rebekah Waldo	CMCA AMS	3/12/2015 3/1/2017	4/1/2027 8/1/2026	No
Dee Smith				No	Rick Zarski	CMCA AMS PCAM	4/1/2015 10/25/2016 8/10/2019	4/1/2027 8/1/2028 8/1/2028	Yes
Denise Gibbs	AMS	3/11/2022	8/1/2028	No	Rita Tinoco				No
De Wayne Frost	CMCA	6/21/2002	8/1/2026	No	Robert Witcher	CMCA	3/17/2025	4/1/2027	No
Dena Mark	CMCA AMS	7/23/2019 4/6/2022	10/1/2025 8/1/2028	No	Sandy Sandoval				No
Diana Calhoun	CCAM	5/19/2022	9/30/2025	No	Sara Schwartz				No
Dillon Graber	CCAM	5/20/2025	5/20/2028	No	Sarah Karlovic	CMCA	12/22/2014	4/1/2027	No
Dora Acosta	CCAM	6/15/2015	6/5/2027	No	Sarah Hake				No
Drew Dimond				No	Scott Long	CMCA AMS	2/10/2015 7/20/2018	4/1/2027 8/1/2027	No
Elizabeth Terry	CMCA AMS	12/19/2024 7/31/2025	10/1/2026 8/1/2028	No	Selina Guillermo	CCAM	6/24/2013	6/24/2028	No
Elizabeth Negrete				No	Shane Frye				No
Evelyn Cabrera				No	Shannon Grynchal	CMCA AMS	10/5/2022 7/9/20124	10/1/2026 8/1/2027	No
Gerri Miller	CMCA	5/27/2025	4/1/2027	No	Shavone Lundy	CMCA	7/17/2025	10/1/2027	No

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Glenna Sommer				No	Shelreese Elieh	CCAM	11/27/2024	11/27/2027	No
Heather Nutt	CMCA AMS	11/1/2019 7/23/2024	10/1/2025 8/1/2027	Yes	Stella Estrada	CMCA	9/5/2023	10/1/2025	No
Ian Ameny-Luthi	CMCA	12/30/2024	10/1/2026	No	Stephanie Hale				No
Irma Rabago	CMCA AMS	4/29/2021 11/12/2021	4/1/2027 8/1/2026	No	Stephanie Schumann	CCAM	5/14/2008	4/14/2026	No
Isaiah Henry	AMS	8/11/2016	8/1/2026	No	Suzy Shielly	CMCA	6/5/2020	4/1/2027	No
Janet Salmon	CMCA AMS	11/13/2017 11/12/2021	10/1/2025 8/1/2028	Yes	Tania Ortiz				No
Jason Kratz	CMCA	4/1/2016	4/1/2026	No	Tiani Bobitch	CMCA AMS PCAM	1/19/2015 1/10/2018 2/20/2024	10/1/2025 8/1/2027 8/1/2027	No
Jazzmine Mark				No	Tiffany McCall	CCAM			No
Jen Anaya				No	Tiffany Petty	CMCA AMS	4/8/2021 8/31/2021	4/1/2027 8/1/2027	No
Jennifer Catron	CMCA	9/17/2017	10/1/2026	No	Toya Wallace				No
Jennifer Simonish				No	Trevor Fenwick	AMS	12/18/2017	8/1/2027	No
Jennifer Parker	CMCA AMS	10/2016 12/2023	10/1/2025 8/1/2027	No	Vanessa Acosta				No
Jessica Murchison				No	Veronica Treto	CCAM	11/28/2017	11/28/2026	No
Jessica Oakes				No	Victoria Ellis	CCAM	9/7/2017	9/7/2026	No
John Felder	PCAM	8/1/2002	8/1/2027	No	Vivian Beirami				No
John Rushing	CMCA AMS	5/13/2022 1/13/2023	4/1/2026 8/1/2026	No					
Johnny Mercado	CMCA AMS	4/27/2018 2/15/2020	4/1/2026 8/1/2026	No					
Jonathan Wolkowicz	AMS CMCA CCAM	6/10/2022 8/17/2021 8/11/2022	8/1/2028 10/1/2027 10/17/2025	No					
Jorjann Mohr				No					
Joshua Freeman	CMCA AMS	11/17/2020 4/26/2021	10/1/2026 8/1/2026	No					
Josiah Schmidt	CMCA	5/22/2025	4/1/2027	No					
Julie McKenna	CMCA	7/30/2019	10/1/2025	No					
Julie Phan	CCAM	12/27/2024	12/27/2027	No					
Julie Dornin				No					
Kara Foley	AMS PCAM CMCA	6/22/2016 11/29/2018 1/12/2015	8/1/2028 8/1/2028 4/1/2027	No					
Karina Ramirez				No					
Kathryn Rich				No					