

**COMMUNITY ASSOCIATION
LAW DAY
MARCH 21, 2025**



EVENT ROADMAP



THANK YOU LAW DAY EVENT SESSION HOST SPONSORS





TIPS FOR RING CENTRAL EVENTS

NOTE: WE ARE UNABLE TO PROVIDE TECHNICAL ASSISTANCE DURING THE LIVE LAW DAY EVENT.

ADVANCE CHECKLIST:

1. Confirm your 2-part event registration [here](#). (The event password: lawday2025.)
 - a. If successfully registered, you will see the Law Day event on your dashboard to select, or directly see the actual event entrance.
 - b. **If you still need to complete the required Part Two of your event registration in RingCentral Events: [do so here](#).** (The event password: lawday2025.)
2. Plan to use a laptop or desktop for optimal experience (not phone).
3. Plan to use Google Chrome or Mozilla Firefox as your browser.
4. Test your device speakers and wifi connectivity in advance.

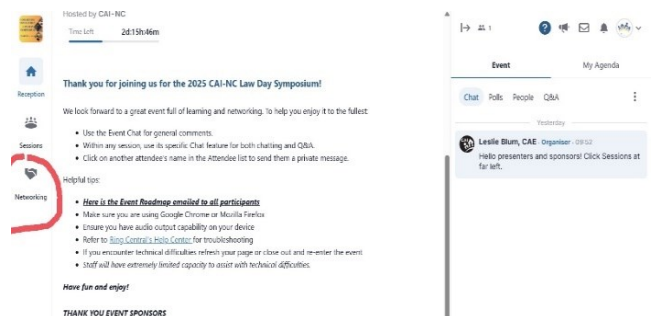
ON MARCH 21: JOINING THE EVENT

Close all other browsers other than Chrome for best connection. Three ways to join:

- 1- Click the Join link in Thursday's reminder email from Ring Central.
- 2- If you added the event to your calendar, join from that link.
- 3 -Go to [RingCentral](#) and sign into your personal account if prompted. (If you land on your dashboard click 2025 CAI-NC Law Day under events.) You may sign in as early as 8:15 a.m. for virtual visiting via Chat.

You will land on the Reception page with:

- Event schedule
- Link to this Event Roadmap
- Event sponsors
- Event "Chat" - connect with friends before 8:30 AM opening remarks.
- Event "Q&A" – submit questions to staff
- Registrants under "People" (search by name)
- "BYOBrunch Break" 11:00-11:30 AM: Click an attendee's name on the People tab to send a private message, or use the Networking feature to invite an attendee to a private video meeting.



By 8:30 am click the Sessions icon at left for the "Main Stage" session.

You can enter any session beginning 10 minutes before its schedule time.

Use the Chat feature to submit BRIEF questions to the presenter.

To leave a Session at any time, click any icon on the left side navigation.

*Please have patience. We are a small team behind the scenes running several applications at once to provide you with the best possible Law Day experience.

IN BRIEF

8:30 AM Welcome in “MAIN STAGE” Session

8:45-9:45 AM SESSION ONE

10:00-11:00 AM SESSION TWO

11:00-11:30 AM “BYOBrunch” Break | Enjoy “Networking” window (at left)

11:30 AM-12:00 PM “MAIN STAGE” Session: *LEGISLATIVE ACTION COMMITTEE*

12:00-1:00 PM SESSION THREE

1:00 PM Concluding Remarks in “MAIN STAGE” Session

8:45 - 9:45 AM SESSION ONE - Choices:

- **When should the association become involved? Amending covenants to restrict short-term rentals.**
 - Bonnie Braudway and Charles Meier, Partner, Marshall, Williams, & Gorham, LLP
- **Identifying, Avoiding, and Navigating Potential Community Nuisances Under North Carolina Law**
 - Adam Beaudoin, CCAL, Partner, Ward & Smith, P.A. and Cynthia Jones, CCAL, Partner, Sellers, Ayers, Dortch & Lyons, P.A.
- **Leadership Skills for HOA Board Members**
 - Matthew Waters, Partner and Catherine Brown, Jordan Price Law Offices
- **Embracing the Future: Integrating Modern Technology into HOAs**
 - Weldon Jones, Partner, and Kelton Ekblad, Jordan Price Law Offices

10:00 - 11:00 AM SESSION TWO - Choices:

- **Managing Challenging Homeowner Relationships: Legal Strategies for Success**
 - Elliot Engstrom, Sellers, Ayers, Dortch & Lyons, P.A.
- **Legal Counsel & Your HOA: Proactive Strategies for Success**
 - Hope Carmichael, CCAL, Partner, and Mollie Cozart, Jordan Price Law Offices
- **IS THIS PERSON YELLING AT ME?! Responding (or not) to the Unruly Owner**
 - Matthew Waters, Partner and Frank Bullock, Jordan Price Law Offices
- **Regulating Parking on Streets (and what other things the Board can regulate)**
 - Hunter D. Cornelius and Madeline Williams, Ward & Smith, P.A.

11:00 AM – 11:30 AM “BYOBrunch BREAK” | Enjoy “Networking” (at left)

11:30 AM – 12:00 PM Main Stage LEGISLATIVE ACTION COMMITTEE UPDATE

- Chair, Harmony Taylor, CCAL – Law Firm Carolinas

12:00 PM – 1:00 PM SESSION THREE -Choices:

- **How to Build Community Through Recreation**
 - o Lori P. Jones, Partner and Kelton Ekblad, Jordan Price Law Offices
- **What you don't know CAN hurt you! Changes to federal and state laws that will impact directors and associations**
 - o Jim Slaughter, CCAL and Adam Marshall, CCAL, Partners, Law Firm Carolinas
- **Transparency – The Good, the Bad, and the Risky**
 - o Alex Dale, Partner, Ward and Smith, P.A
- **Winning the Crowd: Practical Strategies for Managing Membership Meetings**
 - o Steve Sellers, Partner, Sellers, Ayers, Dortch & Lyons, P.A.

1:00 PM MAIN STAGE Concluding Remarks

Full session descriptions: pages 6-11

Speaker introductions: pages 12-16

IMPORTANT:

Slides:

CAI-NC does not provide any slides related to Law Day.

You may request a pdf of a session's slides directly from any speaker after the conclusion of this event.

Session Recordings

To view the recording of any given session (\$25) after Law Day, contact office@cai-nc.org.

COMMUNITY ASSOCIATION LAW DAY SYMPOSIUM 2025

SESSION DESCRIPTIONS

Click the “Sessions” navigation icon to enter or exit any session at any time.

8:45-9:45 AM: SESSION ONE – OPTIONS:

Amending covenants to restrict short term rentals

The same valid HOA rules that apply to owners almost always apply to tenants, and owners can generally be held accountable or fined for the actions of their tenants.

- What constitutes short term rentals
- Recent cases affecting amendments
- Identifying the "problem"
- City/County ordinances
- Careful drafting of the amendment
- Solutions other than an amendment
- Enforcement of restrictions

Presenters: Bonnie Braudway and Charles Meier - Marshall, Williams, & Gorham, LLP

Identifying, Avoiding, and Navigating Potential Community Nuisances Under North Carolina Law

This interactive session will focus on activities that can, at times, become contentious among neighbors over perceived nuisance activities/behavior. For example, dealing with the increased interest in pickle ball and the challenges surrounding location and operation of pickle ball courts; barking dogs; location and operation of dog parks; location and operation of back yard fire pits/meat smokers to name a few. Attendees will walk away understanding how to identify potential community nuisances and help their community association clients strategize on how to limit liability to the Association when planning new amenities or changes to existing amenities, as well as being proactive with rules that limit neighbor vs. neighbor nuisance opportunities. We'll discuss cases from multiple jurisdictions to provide real world examples of nuisance situations that either went well or poorly for their community associations.

**Presenters: Adam Beaudoin, CCAL - Ward and Smith, PA
Cynthia Jones, CCAL - Sellers, Ayers, Dortch & Lyons, PA**

Leadership Skills for HOA Board Members

This topic focuses on equipping Board members with the essential skills and strategies needed to lead effectively, foster collaboration, and ensure the community's success. It's particularly valuable for both new and experienced Board members seeking to enhance their ability to manage their responsibilities and work well with community members.

- Understanding the Role of the Board
- Building a Cohesive Team
- Strategic Decision-Making
- Effective Communication
- Leadership Styles and Adaptability
- Time Management and Delegation
- Legal and Ethical Awareness

Presenters: Matthew Waters and Catherine Brown - Jordan Price Law Offices

Embracing the Future: Integrating Modern Technology into HOAs

This presentation will address how modern technology will affect your Association in the coming years. As technology continues to evolve, it outpaces many Association covenants, rules, and general standards. We'll cover:

- unique challenges for parking and energy consumption as it applies to making space for and installing EV charging stations
- how Community Apps (mobile or web) will be used for Associations (voting, social media, reservations for common spaces, etc.)
- the potential of integrating Fiber Optic Internet and Water main and Leak Monitoring Systems within HOA communities
- monitoring potential Title Fraud within Community Associations;
- the Basics of amending rules or covenants to accommodate advancements in technology

Presenters: Weldon Jones and Kelton Ekblad - Jordan Price Law Offices

10:00-11:00 AM: SESSION TWO – OPTIONS:

Managing Challenging Homeowner Relationships: Legal Strategies for Success

This presentation will inform attendees about best practices for staying compliant and avoiding disfunction when dealing with homeowners who frequently and vocally criticize associations and their managers. We will discuss several critical aspects of these relationships, including:

- Basic Fair Housing Act considerations in communicating with homeowners;
- Attempts by homeowners to involve the association in private disputes;
- When should the association become involved.

Presenters: Elliot Engstrom - Sellers, Ayers, Dortch & Lyons, PA

Legal Counsel & Your HOA: Proactive Strategies for Success

- When and why to seek legal advice;
- The difference between using General Association counsel and specialized legal services;
- Best practices for handling disputes and preventing escalation;
- Budgeting for legal services and maximizing cost efficiency;
- Working with legal counsel to ensure regulatory compliance;
- Maintaining the attorney-client privilege;
- Specific case studies:
 - covenant enforcement
 - legal document review and amendment
 - responding to and defending threats of litigation by owners

Presenters: Hope Carmichael, CCAL and Catherine Brown – Jordan Price Law Offices

IS THIS PERSON YELLING AT ME?! Responding (or not) to the Unruly Owner

This topic focuses on providing Board members and managers with the tools necessary to deal with unruly Owners that write those nasty emails everyone hates.

- Understanding Unruly Behavior
- De-escalation Techniques
- When and How to Respond
- Legal and Ethical Considerations
- Proactive Strategies
- Self-Care for Board Members and Managers
- Interactive Workshop Ideas
- Digital & Written Resources

Presenters: Matthew Waters and Frank Bullock - Jordan Price Law Offices

Regulating Parking on Streets (and what other things the Board can regulate)

- Overview of types of parking restrictions
- Implications of parking restrictions on public v. private streets
- Scope of restrictions contained in restrictive covenants v. restrictions contained in rules and regulations
- Particularly if restrictive covenants only grant rule making authority over common area
- How to implement parking restrictions, both as part of the restrictive covenants and rules and regulations
- Enforcement procedures, generally
- When can association utilize towing to enforce parking restrictions.

Presenters: Hunter D. Cornelius and Madeline Williams - Ward and Smith, PA

12:00 PM - 1:00 PM: SESSION THREE – OPTIONS:

How to Build Community Through Recreation

This presentation will highlight the exciting opportunities and best practices for associations in managing recreational amenities. Participants will gain valuable insights into creating a fair and enjoyable environment, while effectively enforcing rules, so as to enhance amenities for the benefit of all. We'll explore strategies for managing liability risks while ensuring a vibrant, thriving community. Attendees will leave with actionable tips to optimize association amenities and create enriching recreational experiences for their members.

Presenters: Lori P. Jones and Kelton Eklad - Jordan Price Law Offices

What you don't know CAN hurt you! Changes to federal and state laws that will impact directors and associations

What you don't know CAN hurt you! We'll discuss changes to federal and state laws that will impact directors and associations, including rental amendment restrictions, condo regulations, the Corporate Transparency Act, and proposed state laws changes.

Presenters: Jim Slaughter, CCAL and Adam Marshall, CCAL - Law Firm Carolinas

Transparency – The Good, the Bad, and the Risky

Transparency is important for any governing body. But transparency can be inflated as a common good, when it really disrupts the orderly operation of an organization. Hear about examples of community association actions in the spirit of transparency that have actually caused more turmoil and discord.

- When Transparency is required: Document Requests under applicable law;
- When Transparency may be required: Document Requests under governing documents;
- When Transparency can be useful: Successful tools for open forums and member gatherings
- When Transparency is risky: Straw polls;
- When Transparency is a mistake: Putting Director decisions to the membership; and
- When Transparency is dangerous: The need for privacy in contracting, collections, and enforcement activity.

Presenter: Alex Dale - Ward and Smith, PA

Winning the Crowd: Practical Strategies for Managing Membership Meetings

This session will equip participants with practical, real-world strategies for managing (and excelling at) HOA membership meetings. We will discuss all critical aspects of the meeting process from notice to adjournment and focus on proven techniques that help solve some of the most challenging and intimidating aspects of membership meetings – especially contentious ones.

- Calling the Meeting: Annual vs. Special;
- Effective Preparation: “Red Teaming” the meeting, anticipating and avoiding “choke points” along the way;
- Efficient In-Meet Procedures: Setting the stage and tone;
- Establishing and keeping a proper agenda, maximizing efficiency, minimizing “dead time.”;
- Confident (but not over-bearing,
- Crowd and Personality Management (i.e., “Winning the Crowd”);
- Nuclear Options (and how to avoid ever having to use them...);
- Stand-alone budget ratification meetings (are they "special meetings"?).

Presenter: Steve Sellers - Sellers, Ayers, Dortch & Lyons, PA

2025 COMMUNITY ASSOCIATION LAW DAY

PRESENTER INTRODUCTIONS

(alpha order by last name)



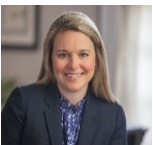
Adam Beaudoin, CCAL, Ward and Smith, PA

As leader of the Community Associations practice, Adam advises community association and country club/yacht club boards and members regarding corporate governance, procedural requirements, governing document amendments, fiduciary duties, inspection right, collection issues, and rule adoption and enforcement. He also has experience preparing all components of community association, country club, and yacht club entity formation, including articles of incorporation, bylaws, committee charters, organizational minutes, confidentiality policy, communication policy, and documentation retention policy.



Bonnie Braudway, Marshall, Graham, and Williams, LLP

Bonnie has been practicing law since 2006 and focuses her practice on community association law, specifically the collection of assessments for associations. Bonnie works closely with both managed and self-managed associations and has extensive experience in all aspects of the collection process. A native of Boone, Bonnie attended the University of North Carolina at Wilmington and graduated cum laude with a Bachelor of Arts in criminal justice. She attended the Norman Adrian Wiggins School of Law at Campbell University and graduated with honors in 2006.



Catherine Brown, Jordan Price Law Offices

Catherine is an associate with Jordan Price who practices in the firm's litigation, business transactions, and estate planning sections. She handles community association disputes, drafting of amendments to governing documents, and advising boards or management companies on various issues that arise. In her experience practicing, she has represented clients in North Carolina State Courts and in front of administrative hearing officers. Catherine was also previously a judicial clerk at the North Carolina Court of Appeals under the direction and guidance of the Honorable Chris Dillon.



Frank Bullock, Jordan Price Law Offices

Frank practices with the firm's litigation section. He specializes in construction law, real property disputes, business and commercial litigation, and community association law. Prior to arriving at Jordan Price, Frank practiced for several years with a well-respected civil litigation firm. After law school, Frank served as a clerk for the Honorable James C. Cacheris, United States District Court Judge for the Eastern District of Virginia.



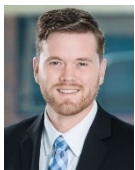
Hope Carmichael, CCAL, Partner, Jordan Price Law Offices

Hope has focused on matters involving the interpretation of restrictive covenants, condominium and planned community associations for over 30 years. She is a leading authority on legal issues affecting condominiums and HOAs in NC and has litigated hundreds of cases at all levels of the state trial and appellate courts. She has consulted on the drafting of nearly every piece of legislation affecting planned communities and condominiums in North Carolina in the last three decades and is a frequent speaker at the local, state and national level to industry professionals and fellow attorneys on issues affecting community associations. Hope has more recently concentrated on serving as general counsel to planned communities with more complex governance and amenities structures and on litigating cases involving the interpretation of restrictions in older, established condominiums and planned communities. She served as president of CAI-NC in 2020 and currently serves as moderator of CAI-NC's Attorney Roundtable and on CCAL's national Amicus Review Committee



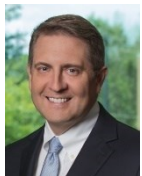
Mollie Cozart, Jordan Price Law Offices

Mollie focuses her practice on community association law. She has been practicing for over 15 years and prior to joining Jordan Price, gained a decade of experience as an insurance defense attorney representing community associations and managers throughout the State in all stages of litigation. Presently, a large part of Mollie's practice is devoted to providing strategic counsel to associations and advising on a broad range of issues, including governing document interpretation, enforcement and amendment, corporate governance, operations, and risk management. Mollie frequently acts as a parliamentarian for annual meetings and assists with developer transition meetings.



Hunter Cornelius, Ward and Smith, PA

Hunter is a community associations attorney who navigates the complexities of homeowner association law. He provides comprehensive counsel to community association board members and managers on all facets of their operations, including maintaining and amending Bylaws and Declarations of Covenants, corporate governance, collections matters, and resolving disputes with homeowners.



Alexander Dale, Ward and Smith, PA

Alex's practice experience encompasses a broad range of business law matters, including experience representing individuals, start-ups, small businesses, and multi-national companies in a variety of fields. His experience includes intellectual property transactional matters, corporate governance, business organization and succession planning, contract negotiation, and complex business litigation. He has also taken numerous cases to a final decision in the areas of breach of contract litigation, trusts and estates litigation, securities and investment advisor litigation, corporate litigation, and complex business litigation.



Elliot Engstrom, Sellers, Ayers, Dortch & Lyons, PA

Elliot Engstrom focuses on the firm's community associations practice, where he helps communities effectively plan for tomorrow while managing the challenges and opportunities of today. In this role, he assists planned communities and condominiums with a variety of issues, including governing document interpretation, records requests, meetings, violations, and risk management. Prior to joining Sellers Ayers, Elliot spent four and a half years as an attorney for Cleveland County, North Carolina, serving during various times as Deputy County Attorney and outside counsel. In that position, he advised over twenty operational departments and numerous county boards on a wide range of issues including land use, board procedures, legislation, contracts, economic development, and law enforcement. Elliot also spent two years on the faculty of the Elon University School of Law, where he taught legal writing, administrative law, and introduction to legal methods.



Kelton Ekblad, Jordan Price Law Offices

Kelton practices with the firm's litigation section. He handles a wide variety of general litigation matters including construction litigation, real property disputes, estate and trust litigation, community association law matters, and general civil litigation. Kelton is a native of Salt Lake City, Utah, where he worked as a general civil litigation attorney for several years, representing clients in a wide range of matters ranging from ski resort defense to complex litigation matters. Kelton has recently relocated to Raleigh, North Carolina in 2024.



Cynthia Jones, CCAL, Sellers, Ayers, Dortch & Lyons, PA

Cynthia concentrates her practice on representing community associations across North and South Carolina. She frequently works on the development, creation and organization of condominium and homeowner's associations. Cynthia is active with CAI and is currently serving on the National Board of Directors. She is also a past president of the North Carolina Chapter of CAI. She enjoys providing education on community association matters and is a frequent speaker at events all across the country.



Lori Jones, Partner, Jordan Price Law Offices

Lori's practice focuses on community association law and business litigation. She is experienced in business and community association realms in handling discrimination claims and best practices to avoid them. In the community association field, she routinely represents associations in litigation matters and advises board members and property managers regarding other legal aspects of community association law, including governance, covenant interpretation and enforcement. Lori also serves on the CAI NC Legislative Action Committee.



Weldon Jones III, Partner, Jordan Price Law Offices

Weldon is a Partner with the firm, practicing in the firm's litigation section. Mr. Jones joined the firm in 2017, after graduating from Campbell Law School. Prior to joining the

firm in the legal capacity, Mr. Jones worked in the firm's legislative representation section as a lobbyist. Weldon handles general litigation matters, and practices in areas including construction law, community association litigation, and commercial litigation. Additionally, he also continues to represent clients as a lobbyist before the North Carolina General Assembly.



Adam Marshall, Partner, Law Firm Carolinas

Adam Marshall is a partner at Law Firm Carolinas and focuses his practice on representation of community associations in North Carolina. Specifically, providing guidance to the firm's community association clients regarding matters of governing document interpretation, association governance, and collections. Adam is a member of North Carolina's Community Association Institute (CAI) and regularly gives educational presentations to community association managers and association board members at various CAI organized events and conferences. Additionally, Adam has presented at both the national CAI Law Seminar and Annual Conference. Adam leads the firm's land use, zoning and planning section and practices in the area of corporate law, debt collection, and residential real estate.



Charles Meier, Marshall, Williams and Gorham, LLP

Charles Meier is a partner at Marshall, Williams, and Gorham, LLP and focuses his practice on Community Association Law. He has been practicing with the same firm for 40 years. He provides services in the areas of general counsel, litigation and collections. He has litigated hundreds of cases for HOAs at the District and Superior Court level in every county in southeastern North Carolina. and taken many of those cases to the North Carolina Court of Appeals and the North Carolina Supreme Court. He currently represents about 300 HOAs. He has been a frequent presenter at the Annual NC-CAI Law Days and has attended the National CAI Law Seminars almost every year for the last 14 years.



Steve Sellers, Sellers, Ayers, Dortch & Lyons, PA

Steve Sellers is a Charlotte native who graduated from Providence Day School before attending Davidson College, where, in 2005, he graduated Cum Laude with a degree in History. After spending several years as a whitewater rafting and mountaineering guide in central Colorado, Steve returned to North Carolina where he enrolled in the Wake Forest University School of Law in 2008. After graduating with a law degree Cum Laude in 2011, Steve began work as a criminal prosecutor in the Mecklenburg County District Attorney's Office where he served on the District Court, Misdemeanor Appeals and felony Drug Prosecution Teams. In April 2014, Steve left the DA's office to join Sellers, Ayers, Dortch & Lyons where his efforts are focused on the firm's vibrant community association and land development practice.



Jim Slaughter, CCAL, Law Firm Carolinas

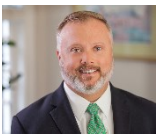
Jim Slaughter has been with Law Firm Carolinas since 2001 and serves as firm President. He regularly speaks on issues of real estate and community association law and has authored hundreds of HOA and condo articles. Jim was the first attorney in the Carolinas inducted as a Fellow into CAI's College of Community Association Lawyers (CCAL) and served as CCAL's 2014 national President. He was also the first North Carolina attorney recognized by *Best Lawyers* in the category of "Community Association Law." Jim served for many years on the initial NC Bar Association Community Associations Committee and is past

President of the NC Chapter of the Community Associations Institute. At the 2024 national Community Association Law Seminar, Jim received the Buck Lifetime Contribution Award, which recognizes attorneys who have demonstrated exceptional commitment to the community association industry.



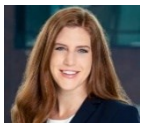
Harmony Taylor, CCAL, Partner, Law Firm Carolinas

Harmony focuses her practice on representation of community associations on litigated and non-litigated matters. Harmony regularly advises on association governance, assists with director and member meetings, represents communities in district and superior courts, and represents associations in complaints brought before local human relations commissions on Fair Housing and other discrimination claims. Harmony regularly speaks to boards, managers and owners on community association related topics, including Law Day. Harmony also serves on CAI's Legislative Action Committee for North Carolina as well as the College of Community Association Lawyers Governing Documents Task Force. Harmony also represents individuals and entities in negotiating and drafting leases and contracts and litigating disputes arising from these agreements. Harmony has participated in hundreds of mediations and over twenty jury trials and has litigated cases in district and superior courts across North Carolina through the appellate level. Harmony currently chairs the CAI NC Legislative Action Committee.



Matthew Waters, Partner, Jordan Price Law Offices

Matt is a Partner at Jordan Price Law Offices, focusing on representing homeowners' associations and condominium associations across North Carolina. His practice includes covenant enforcement, amendments, meetings, assessment collections, and community association governance. Matt has extensive experience in state and appellate courts, successfully handling covenant enforcement and collection cases, and has represented clients before the North Carolina Court of Appeals and the Supreme Court. He is a Director on the Board of Directors for CAI-NC, and also Chair of the Community Associations "U" Committee, the first of its kind in the U.S., developing curriculum for new managers. Matt is also the Immediate Past Chair of the North Carolina Bar Association's Real Property Section and co-chairs the Return to the Vault program, a program he created for the Section in 2022.



Madeline Williams, Ward and Smith, PA

Madeline has a versatile practice, with a primary focus on community associations, business law, and land use and zoning matters. As a community associations attorney, Madeline frequently advises boards regarding the formation of new community associations, corporate governance, procedural requirements, governing document amendments, fiduciary duties, inspection rights, collection issues, and rule adoption and enforcement. Madeline also devotes a portion of her practice to helping clients navigate zoning and land use issues, including, but not limited to, zoning and rezoning matters, special use permits, conditional rezonings, and variances. Madeline serves as the secretary to the North Carolina Legislative Action Committee.

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AUGUST 21-22 – Downtown Wilmington



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