



4301 Westbank Drive, Suite B-130
 Austin, Texas 78746
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INVOICE

Invoice # 10773
 Date: 07/09/2024

Windermere Oaks Water Supply Corporation
 424 Coventry Rd.
 Spicewood, Texas 78669

0100 - Windermere Oaks WSC - General

Date	Attorney	Description	Quantity	Total
06/03/2024	ERS	Telephone call with J. Walker; review and revise draft agenda; review draft minutes; email from J. Walker regarding conflict of interest forms, review applicable law, bylaws, and WSC policies and send email to J. Walker with guidance.	3.80	\$1,235.00
06/03/2024	YAL	Review the June 6 agenda and meeting with E. Selvera regarding same; receive and review June 1 meeting minutes and update the file.	0.80	\$132.00
06/04/2024	YAL	Create bylaws comparisons and update the file.	0.10	\$16.50
06/05/2024	ERS	Confer with Y. Lara regarding email from B. Garceau regarding Windermere Policies.	0.10	\$32.50
06/05/2024	JJC	Receive and review correspondence from B. Garceau regarding Code of Ethics; work regarding same.	0.20	\$85.00
06/11/2024	ERS	Review draft request for extension of time to file annual report.	0.50	\$162.50
06/17/2024	YAL	Receive and review the June 20 agenda and email same to J. Walker; finalize the June 1 meeting minutes and email same to J. Walker.	0.40	\$66.00
06/17/2024	ERS	Email from J. Walker regarding agenda and minutes; review and revise agenda and minutes.	0.70	\$227.50
06/18/2024	ERS	Telephone call with J. Walker regarding meetings and reports to the board.	0.10	\$32.50
06/19/2024	YAL	Gather items and prepare the June 20 agenda packet for attorney use.	1.50	\$247.50
06/19/2024	ERS	Email from D. Flunker regarding the agenda and TOMA; email from P. Flunker regarding committee conference call, review Open Meetings Act requirements.	4.00	\$1,300.00

06/19/2024	JJC	Office meeting regarding status of projects and strategy recommendations for client.	0.50	\$212.50
06/20/2024	ERS	Prepare for meeting; travel to and from and attend board meeting.	4.80	\$1,560.00
06/20/2024	KEH	Brief office conference regarding status of materials for scheduled Board meeting; review and compile additional materials and update attorney notebook; office conference regarding status of same.	1.30	\$227.50
06/24/2024	ERS	Email from and to J. Walker regarding TOMA.	0.60	\$195.00
06/27/2024	YAL	Email to J. Walker requesting the June meeting minutes.	0.10	\$16.50

Time Keeper	Quantity	Rate	Total
John Carlton	0.7	\$425.00	\$297.50
Erin Selvera	14.6	\$325.00	\$4,745.00
Katy Hennings	1.3	\$175.00	\$227.50
Yolanda Lara	2.9	\$165.00	\$478.50
		Subtotal	\$5,748.50

0101 - Windermere Oaks WSC - Special Projects

Date	Attorney	Description	Quantity	Total
05/09/2024	ESE	Confer regarding D. Taylor and R. Shaefer hearing removal, scan and save ballots, coupons and instructions; confer regarding redacted copies; scan and save same.	2.00	\$330.00
06/04/2024	YAL	Draft code of ethics acknowledgement page and update the file.	0.20	\$33.00
06/04/2024	ERS	Review and revise draft acknowledgement form for corporation policies.	0.30	\$97.50
06/05/2024	YAL	Finalize the Code of Ethics acknowledgement page and email same to J. Walker.	0.20	\$33.00
06/10/2024	YAL	Receive and review the signed Code of Ethics acknowledgement page and TOMA certificate from B. Garceau and the signed Code of Ethics acknowledgement page from S. Miller and update the file.	0.10	\$16.50
06/12/2024	JMS	Review correspondence from J. Gimenez.	0.10	\$18.50
06/12/2024	ERS	Telephone call with J. Walker regarding next meeting and request and status of CCN matter.	0.60	\$195.00

06/13/2024	JJC	Conference with J. Mauldin regarding Lloyd Gosselink invoices.	0.20	\$85.00
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Time Keeper	Quantity	Rate	Total
John Carlton	0.2	\$425.00	\$85.00
Jennifer Schein	0.1	\$185.00	\$18.50
Erin Selvera	0.9	\$325.00	\$292.50
Elle Eades	2.0	\$165.00	\$330.00
Yolanda Lara	0.5	\$165.00	\$82.50
		Subtotal	\$808.50

0106 - Windermere Oaks WSC - PIA Requests

Services

Date	Attorney	Description	Quantity	Total
06/04/2024	JMS	Work regarding May 20 information request for election materials; review comparison of 2014 and 2018 bylaws; email to F. Reilly; discuss regarding May 20 information request for election materials; phone calls to F. Reilly; draft correspondence to J. Gimenez; email to J. Gimenez; email to J. Walker.	3.20	\$592.00
06/05/2024	JMS	Attention regarding correspondence received from J. Gimenez; email to J. Gimenez.	0.20	\$37.00
06/06/2024	JMS	Work regarding inspection of election information by J. Gimenez; review correspondence received from J. Ward regarding Attorney General complaint from P. Flunker.	1.40	\$259.00
06/07/2024	JMS	Attention regarding inspection of election material by J. Gimenez.	0.20	\$37.00
06/10/2024	ERS	Review Public Information Act requests from D. Flunker and prepare response acknowledging receipt.	0.30	\$97.50
06/10/2024	JMS	Review public information act requests from D. Flunker; email to D. Flunker; draft correspondence to J. Ward with the Attorney General's Office.	1.20	\$222.00
06/11/2024	JMS	Email to D. Flunker; continue work regarding correspondence in response to Attorney General complaint by P. Flunker.	0.10	\$18.50
06/13/2024	JMS	Continue work regarding correspondence in response to Attorney General complaint by P. Flunker; email to L. Cantrell; email to J. Walker.	0.80	\$148.00

06/14/2024	JMS	Phone call from J. Walker.	0.40	\$74.00
06/19/2024	JMS	Attention and work regarding Public Information Act requests received June 7 and June 10 from D. Flunker; emails to J. Walker; review law regarding position of public information officer under the public information act; email to L. Cantrell.	1.20	\$222.00
06/20/2024	YAL	Receive and review responsive items to D. Flunker June 7, 2024 Public Information Act request and update the file.	0.10	\$16.50
06/20/2024	JMS	Review responsive information to Public Information Act request received from L. Cantrell; email to L. Cantrell; continue work regarding correspondence in response to Attorney General complaint by P. Flunker.	1.50	\$277.50
06/21/2024	JMS	Email to R. Ffrench; email to L. Cantrell regarding records; work regarding June 7 Public Information Act request from D. Flunker; draft correspondence to Attorney General regarding same; draft correspondence to D. Flunker; email to D. Flunker; file written correspondence with Attorney General; email to D. Flunker and B. Garceau.	1.20	\$222.00
06/25/2024	JMS	Email to B. Garceau regarding June 7 Public Information Act request; continue review of responsive information to same; attention regarding June 10 Public Information Act requests received.	0.40	\$74.00
06/26/2024	JMS	Attention regarding June 7 Public Information Act request.	0.10	\$18.50
06/26/2024	YAL	Receive and review responsive documents for the D. Flunker June 7 Public Information Act request and update the file.	0.20	\$33.00
06/27/2024	JMS	Attention and discussion regarding Public Information Act requests received from D. Flunker June 7 and June 10; draft correspondence to D. Flunker; draft correspondence to J. Walker, B. Garceau, and S. Miller; emails to D. Flunker.	1.50	\$277.50
06/28/2024	JMS	Review response to request to clarification from D. Flunker; email to B. Garceau and J. Walker; complete draft of correspondence to J. Walker, B. Garceau, and S. Miller and email to same; review information regarding P. Flunker information request from May 22, 2023; email to J. Ward regarding same.	2.60	\$481.00
Services Subtotal				\$3,107.00

Expenses

Type	Date	Description	Quantity	Rate	Total
Expense	06/21/2024	Attorney General efilng fee for Public Information Act request ruling.	1.00	\$7.50	\$7.50
Expenses Subtotal					\$7.50

Time Keeper	Quantity	Rate	Total
Jennifer Schein	16.0	\$185.00	\$2,960.00
Erin Selvera	0.3	\$325.00	\$97.50
Yolanda Lara	0.3	\$165.00	\$49.50
		Subtotal	\$3,114.50

0107 - Windermere Oaks WSC - IRS Examination

Date	Attorney	Description	Quantity	Total
06/28/2024	ERS	Telephone call with J. Romero regarding IRS inquiry and next IDR; evaluate requests and send information to the Board.	2.70	\$877.50
06/28/2024	YAL	Receive and review new IRS request, research same, update the file, and calendar the deadline.	0.90	\$148.50
06/28/2024	YAL	Receive and review IRS notice approving extension to file the Exempt Organization Form, meeting with E. Selvera regarding same, and update the file.	0.30	\$49.50
06/28/2024	ESE	Confer regarding IRS documents; scan and save same.	0.20	\$33.00

Time Keeper	Quantity	Rate	Total
Erin Selvera	2.7	\$325.00	\$877.50
Elle Eades	0.2	\$165.00	\$33.00
Yolanda Lara	1.2	\$165.00	\$198.00
		Subtotal	\$1,108.50

0102 - PUC Docket 55454 and Compliance Docket 56167

Date	Attorney	Description	Quantity	Total
06/05/2024	JJC	Receive and review correspondence from M. Lander regarding annual report filing; draft response.	0.20	\$105.00
06/07/2024	JMS	Email conference with M. Lander regarding annual report filing.	0.20	\$37.00

06/10/2024	JMS	Draft request for extension to file annual report in docket 56167; review information regarding and form for Class D annual report.	1.30	\$240.50
06/11/2024	JMS	Review and revise request for extension to file annual report and prepare same for filing.	0.20	\$37.00
06/12/2024	JMS	Finalize request for extension concerning annual report filing.	0.10	\$18.50
06/12/2024	YAL	File the Request for Extension to file Annual Report with the Public Utilities Commission, receive file marked copy, and update the file.	0.40	\$70.00
06/26/2024	JJC	Receive and review correspondence from H. Burkhalter denying request for extension.	0.20	\$105.00

Time Keeper	Quantity	Rate	Total
John Carlton	0.4	\$525.00	\$210.00
Jennifer Schein	1.8	\$185.00	\$333.00
Yolanda Lara	0.4	\$175.00	\$70.00
		Subtotal	\$613.00

0103 - PUC Docket 55840 - CCN Amendment

Date	Attorney	Description	Quantity	Total
06/03/2024	MLP	Continue reviewing Intervenors' First Requests for Information from Windermere Oaks Water Supply Corporation; continue researching procedural guidelines for objections and responses; review information sent from J. Walker.	4.20	\$462.00
06/04/2024	YAL	Receive and review Intervenors' First Request for Information and calendar deadline to respond.	0.10	\$17.50
06/05/2024	YAL	Calendar deadline to object to Responses to Intervenor's Request for Information; draft Response to Intervenor's Request for Information;	0.50	\$87.50
06/05/2024	MLP	Continue reviewing Intervenors' First Requests for Information from Windermere Oaks Water Supply Corporation; continue researching procedural guidelines for objections and responses; continue reviewing information sent from J. Walker; review Staff's Second Request for Information; review bylaws.	7.60	\$836.00
06/07/2024	YAL	Continue to draft the Objections to Intervenors Request for Information, Responses to Intervenors Request for Information.	2.80	\$490.00
06/07/2024	MLP	Continue reviewing Intervenors' First Requests for Information from Windermere Oaks Water Supply Corporation; continue	2.80	\$308.00

		researching procedural guidelines for objections and responses; continue reviewing information sent from J. Walker; review Staff's Second Request for Information; begin preparing objections; call A. Hicks (Intervenor) about negotiating discovery responses per 16 Texas Administrative Code 22.144(d) and email all Intervenor's regarding same.		
06/10/2024	ERS	Review objections to Intervenor's Requests for Information	3.40	\$1,360.00
06/10/2024	YAL	Revise and finalize the Objections to Intervenor's First Request for Information, update the file, file with the Public Utility Commission, and email courtesy to attorney's of record.	0.90	\$157.50
06/10/2024	MLP	Continue reviewing Intervenor's First Requests for Information from Windermere Oaks Water Supply Corporation; continue researching procedural guidelines for objections and responses; continue researching objections; continue drafting, preparing, and finalizing objections.	3.90	\$429.00
06/11/2024	ERS	Evaluate the need for the CCN amendment application in light of existing state law.	0.50	\$200.00
06/11/2024	MLP	Teleconference with J. Walker regarding remaining Intervenor's Requests for Information we did not object to; research Water Code and PUC rules; review Proposed Order and Settlement Agreement for PUC Docket No. 55454.	2.10	\$231.00
06/12/2024	YAL	Draft the response to Staff's Second Request for Information and update the file.	0.60	\$105.00
06/12/2024	MLP	Continue researching Water Code and PUC rules; continue reviewing Proposed Order and Settlement Agreement for PUC Docket No. 55454; teleconference with J. Walker regarding certificate of convenience and necessity amendment; review bylaws, articles of incorporation, and tariff; research Burnet County Appraisal District map.	4.20	\$462.00
06/13/2024	MLP	Review Staff's Recommendation on Administratively Completeness and Procedural Schedule; prepare correspondence to J. Walker regarding same and need for engineer to inspect infrastructure installed by developer.	1.20	\$132.00
06/14/2024	MLP	Review Order No. 10.	0.10	\$27.50
06/18/2024	YAL	Receive and review the Intervenor's Motion to Compel and calendar deadlines.	0.10	\$17.50
06/18/2024	YAL	Draft response to Intervenor's Motion to Compel and update the file.	0.40	\$70.00
06/18/2024	ERS	Review draft responses to discovery.	0.30	\$120.00
06/18/2024	MLP	Draft Responses to Intervenor Members' First Request for Information; prepare correspondence to J. Walker requesting review of responses and to provide missing information.	2.10	\$231.00
06/19/2024	ERS	Confer with M. Parsons about response to Motion to Compel from Intervenor's.	0.20	\$80.00

06/19/2024	MLP	Review Intervenor's Motion to Compel Responses; draft responses to motion to compel and research responses for PUC Docket No. 55840; continue working on Responses to Intervenor Members First Request for Information for same docket.	2.90	\$319.00
06/20/2024	ERS	Evaluate responses to Intervenor's Motion to Compel Responses to its First Requests for Information.	0.70	\$280.00
06/20/2024	YAL	Finalize and file the Response to Intervenor's First Request for Information, email same to attorneys and parties of record, and update the file.	0.40	\$70.00
06/20/2024	MLP	Continue reviewing Intervenor's Motion to Compel Responses; continue drafting responses to motion to compel and continue researching responses; continue working on and finalize Responses to Intervenor Members' First Request for Information for same docket; teleconference with J. Walker regarding same.	7.30	\$803.00
06/21/2024	MLP	Continue reviewing Intervenor's Motion to Compel Responses; continue drafting responses to motion to compel and continue researching responses.	6.40	\$704.00
06/23/2024	MLP	Continue reviewing Intervenor's Motion to Compel Responses; continue drafting responses to motion to compel and continue researching responses.	1.70	\$187.00
06/24/2024	ERS	Review draft response to Motion to Compel; evaluate information needed for responses to Staff's second set of Requests for Information.	1.30	\$520.00
06/24/2024	MLP	Continue reviewing Intervenor's Motion to Compel Responses; continue drafting responses to motion to compel and continue researching responses; finalize response; teleconference with J. Walker regarding Staff's 2nd Request for Information; review file for requested information and draft responses.	5.40	\$594.00
06/24/2024	KEH	Office conference regarding status of filing deadline and scope of work to be completed; review and revise Windermere Oaks Water Supply Corporation's Response to Intervenor Members' Motion to Compel Response to Its First Request of Information; confer regarding status of same; finalize Response to Motion to Compel, submit for filing with PUC; prepare communications forwarding same to interested parties per Certificate of Service and to J. Walker per attorney request.	3.80	\$760.00
06/25/2024	ERS	Review draft responses to Commission Staff's Second Requests for Information.	0.30	\$120.00
06/25/2024	YAL	Review and finalize the Response to Staff's Second Request for Information, update the file, file with the Public Utility Commission, and email courtesy copies to attorneys of record and client; receive and review responsive items and update the file.	0.80	\$140.00
06/25/2024	MLP	Continue drafting responses to Staff's 2nd Request for Information; prepare correspondence to J. Walker regarding same; review file for requested information; finalize responses to file.	2.90	\$319.00
06/26/2024	MLP	Research Texas Administrative Code and Texas Water Code;	1.20	\$132.00

		discussion with E. Selvera regarding notice requirements.		
06/27/2024	ERS	Analyze notice documents and memo from PUC; confer with M. Parsons on next steps.	1.00	\$400.00
06/27/2024	YAL	Draft Non Standard Service Agreement for J. Madigan.	1.60	\$280.00
06/27/2024	MLP	Research the parcels that make up the transfer area; verify acreage and ownership through maps, deeds and plat in Burnet County property records, and Burnet County Central Appraisal District; teleconference with D. Skawin (PUC Staff) regarding notice and acreage; prepare correspondence to S. Burt (creator of submitted maps) regarding 16.49 acres v. 18 acres; organize and separate memoranda, affidavits, and notices to send to J. Walker as individual documents; draft notice instructions email.	7.80	\$858.00
06/28/2024	YAL	Calendar deadlines from Order No. 10.	0.10	\$17.50
06/28/2024	MLP	Review and revise notice email to J. Walker, B. Garceau, S. Miller, and L. Cantrell; review maps after receiving response email from S. Burt.	0.70	\$77.00
Line Item Discount Subtotal				-\$10,626.00

Time Keeper	Quantity	Rate	Discount	Total
Michael Parsons	64.5	\$275.00	-\$10,626.00	\$7,111.50
Erin Selvera	7.7	\$400.00	-	\$3,080.00
Katy Hennings	3.8	\$200.00	-	\$760.00
Yolanda Lara	8.3	\$175.00	-	\$1,452.50
Subtotal				\$12,404.00

0104 - PUC Docket 56273 - Rate Case Expenses in Docket 50788

Date	Attorney	Description	Quantity	Total
06/11/2024	ERS	Review data from billing clerk showing refunds and surcharges and confer with M. Parsons regarding filing with Commission.	1.30	\$520.00
06/26/2024	ERS	Review and conference with M. Parsons regarding responses to Staff's First RFIs.	0.80	\$320.00

Time Keeper	Quantity	Rate	Total
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Erin Selvera	2.1	\$400.00	\$840.00
Subtotal			\$840.00

0105 - PUC Docket 56727 - Refunds from Docket 50788

Date	Attorney	Description	Quantity	Total
06/11/2024	MLP	Review compliance report; draft cover letter for compliance report; prepare correspondence with L. Cantrell regarding same; file compliance report and cover letter.	2.80	\$616.00
06/13/2024	YAL	Draft and finalize the cover letter to supplement native file compliance report, update the file, file with the Public Utility Commission, and email courtesy copy to attorney's of record and client.	0.50	\$87.50
06/14/2024	MLP	Review Staff's First Request for Information; teleconference with J. Walker regarding same.	0.50	\$110.00
06/20/2024	MLP	Review Ratepayer Representatives Letter of Notification of Discrepancies in Compliance Report; teleconference and email with J. Walker regarding same.	0.80	\$176.00
06/24/2024	MLP	Review spreadsheets for refunds/surcharges; teleconference with J. Walker regarding same and Staff's 1st Requests for Information.	0.70	\$154.00
06/25/2024	YAL	Review Order No. 3 and calendar deadlines.	0.20	\$35.00
06/25/2024	MLP	Continue reviewing spreadsheets for refunds/surcharges regarding Staff's 1st Request for Information; draft responses to Staff's 1st Request for Information.	2.70	\$594.00
06/26/2024	MLP	Continue reviewing spreadsheets for refunds/surcharges regarding Staff's 1st Request for Information; discussion with E. Selvera regarding compliance reports and changes needed.	1.40	\$308.00
06/28/2024	YAL	Calendar deadlines to respond to Staff's First Request for Information.	0.10	\$17.50
Line Item Discount Subtotal				-\$489.50

Time Keeper	Quantity	Rate	Discount	Total
Michael Parsons	8.9	\$275.00	-\$489.50	\$1,958.00
Yolanda Lara	0.8	\$175.00	-	\$140.00
Subtotal				\$2,098.00

Subtotal **\$26,735.00**
Total **\$26,735.00**

Statement of Account

Outstanding Balance		New Charges		Payments Received		Total Amount Outstanding
(\$0.00	+	\$26,735.00)-	(\$0.00)=	\$26,735.00

Detailed Statement of Account

Current Invoice

Invoice Number	Due On	Amount Due	Payments Received	Balance Due
10773	07/09/2024	\$26,735.00	\$0.00	\$26,735.00
			Outstanding Balance	\$26,735.00
			Total Amount Outstanding	\$26,735.00

Please make all amounts payable to: The Carlton Law Firm, P.L.L.C., and please note our address:

The Carlton Law Firm, P.L.L.C.
4301 Westbank Drive, Suite B-130
Austin, Texas 78746

Payment is due upon receipt. Please include invoice numbers as an additional reference so we may accurately identify and apply your payment. Thank you!