



# INVOICE

Invoice # 11042  
Date: 10/02/2024

4301 Westbank Drive, Suite B-130  
Austin, Texas 78746  
Phone: 512-614-0901

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

## 0100 - Windermere Oaks WSC - General

| Date       | Attorney | Description   | Quantity | Total    |
|------------|----------|---|----------|----------|
| 09/05/2024 | YAL      | Research minutes needed from 2024 to update the file.   | 0.70     | \$115.50 |
| 09/05/2024 | ERS      | Verify status of pending projects; email from B. Garceau and S. Walker regarding proposed Bylaws and agenda items including Schedule D. | 0.80     | \$260.00 |
| 09/09/2024 | YAL      | Email from B. Garceau regarding September 17 meeting date and update the file and calendar.   | 0.20     | \$33.00  |
| 09/11/2024 | YAL      | Email to Directors requesting a copy of the September 17 agenda.  | 0.10     | \$16.50  |
| 09/12/2024 | YAL      | Receive and review the September 17 agenda and update the file; email to Directors with revised agenda.                                 | 0.50     | \$82.50  |
| 09/17/2024 | YAL      | Research and calendar October meeting date and update the file.   | 0.10     | \$16.50  |
| 09/25/2024 | YAL      | Emails with Directors requesting September 17 meeting minutes.  | 0.10     | \$16.50  |
| 09/26/2024 | YAL      | Emails with S. Miller regarding Board meeting minutes since June 1, 2024.   | 0.10     | \$16.50  |
| 09/27/2024 | YAL      | Update the database with Director contact information.  | 0.10     | \$16.50  |

| Time Keeper     | Quantity | Rate     | Total           |
|-----------------|----------|----------|-----------------|
| Erin Selvera    | 0.8      | \$325.00 | \$260.00        |
| Yolanda Lara    | 1.9      | \$165.00 | \$313.50        |
| <b>Subtotal</b> |          |          | <b>\$573.50</b> |

## 0101 - Windermere Oaks WSC - Special Projects

| Date       | Attorney | Description  | Quantity | Total    |
|------------|----------|--|----------|----------|
| 09/12/2024 | YAL      | Email from S. Miller regarding status of Resolution Regarding Bylaws, receive signed version, and update the file.                                 | 0.10     | \$16.50  |
| 09/18/2024 | ERS      | Email from J. Walker requesting legal opinion regarding standby fees; confer with E. Humpal regarding memorandum to client addressing this issue.  | 0.40     | \$130.00 |
| 09/18/2024 | EAH      | Review tariff and relevant statutes and regulations; confer with E. Selvera regarding scope of question asked by J. Walker.                        | 2.30     | \$460.00 |
| 09/19/2024 | EAH      | Email to J. Walker requesting call to discuss standby fee challenges; Call with J. Walker discussing context of member challenges to standby fees. | 0.80     | \$160.00 |
| 09/20/2024 | EAH      | Confer with E. Selvera regarding conversation with J. Walker and discuss additional research required to address standby fee challenges.           | 1.00     | \$200.00 |

| Time Keeper      | Quantity | Rate            | Total           |
|------------------|----------|-----------------|-----------------|
| Elizabeth Humpal | 4.1      | \$200.00        | \$820.00        |
| Erin Selvera     | 0.4      | \$325.00        | \$130.00        |
| Yolanda Lara     | 0.1      | \$165.00        | \$16.50         |
|                  |          | <b>Subtotal</b> | <b>\$966.50</b> |

## 0106 - Windermere Oaks WSC - PIA Requests

| Date       | Attorney | Description   | Quantity | Total    |
|------------|----------|---|----------|----------|
| 09/03/2024 | YAL      | Receive and review August 30 public information request from D. Flunker and update the file.  | 0.10     | \$16.50  |
| 09/06/2024 | JMS      | Receive and review correspondence from D. Flunker; attention regarding same; emails to J. Walker and B. Garceau; email to S. Miller.  | 0.60     | \$111.00 |
| 09/17/2024 | JMS      | Review correspondence from D. Flunker; email to L. Cantrell; draft correspondence in response to September 2 Public Information Act request and email same to D. Flunker; email to J. Walker and B. | 0.20     | \$37.00  |

|            |     |   |      |         |
|------------|-----|---|------|---------|
|            |     | Garceau.  |      |         |
| 09/29/2024 | JMS | Review Public Information Act request received from D. Flunker; email to L. Cantrell. | 0.10 | \$18.50 |

| Time Keeper     | Quantity | Rate            | Total           |
|-----------------|----------|-----------------|-----------------|
| Jennifer Schein | 0.9      | \$185.00        | \$166.50        |
| Yolanda Lara    | 0.1      | \$165.00        | \$16.50         |
|                 |          | <b>Subtotal</b> | <b>\$183.00</b> |

## 0107 - Windermere Oaks WSC - IRS Examination

| Date       | Attorney | Description   | Quantity | Total   |
|------------|----------|---|----------|---------|
| 09/05/2024 | YAL      | Research regarding IRS responses.   | 0.40     | \$66.00 |
| 09/11/2024 | YAL      | Receive and review the signed IRS response from S. Miller, update the file, and upload to the IRS portal. | 0.40     | \$66.00 |

| Time Keeper  | Quantity | Rate            | Total           |
|--------------|----------|-----------------|-----------------|
| Yolanda Lara | 0.8      | \$165.00        | \$132.00        |
|              |          | <b>Subtotal</b> | <b>\$132.00</b> |

## 0102 - PUC Docket 55454 and Compliance Docket 56167

| Date       | Attorney | Description  | Quantity | Total    |
|------------|----------|--|----------|----------|
| 09/05/2024 | YAL      | Research items needed to submit to the Public Utility Commission and email to the Directors regarding same.  | 0.30     | \$52.50  |
| 09/05/2024 | YAL      | Research status of compliance items and meeting with E. Selvera regarding same.  | 0.50     | \$87.50  |
| 09/09/2024 | YAL      | Research regarding items for compliance and deadlines.   | 0.10     | \$17.50  |
| 09/12/2024 | YAL      | Continue to update the excel sheet tracking compliance items and research regarding same; research and draft letter to submit Bylaws to the Public Utilities Commission. | 0.70     | \$122.50 |

|            |     |   |      |          |
|------------|-----|---|------|----------|
| 09/23/2024 | YAL | Additional revisions to the cover letter submitting Proposed Bylaws, update the file, and create litera comparison. | 0.70 | \$122.50 |
| 09/24/2024 | YAL | Receive and review Order No. 8, update the file, calendar deadlines, and email to client.                           | 0.10 | \$17.50  |

| Time Keeper  | Quantity | Rate            | Total           |
|--------------|----------|-----------------|-----------------|
| Yolanda Lara | 2.4      | \$175.00        | \$420.00        |
|              |          | <b>Subtotal</b> | <b>\$420.00</b> |

## 0103 - PUC Docket 55840 - CCN Amendment

| Date       | Attorney | Description  | Quantity | Total      |
|------------|----------|--|----------|------------|
| 09/03/2024 | YAL      | Additional research regarding the J. Madigan agreement.  | 0.70     | \$122.50   |
| 09/05/2024 | MLP      | Review affidavits for notice; prepare correspondence to J. Walker regarding proof of notice.   | 0.30     | \$82.50    |
| 09/09/2024 | MLP      | Draft cover letter for Proof of Notice; review and organize attachments, file Proof of Notice with attachments.  | 1.80     | \$247.50   |
| 09/11/2024 | MLP      | Review enforcement order and administrative code regarding requirement for certificate of convenience and necessity.   | 0.90     | \$247.50   |
| 09/13/2024 | MLP      | Teleconference with D. Skawin (PUC) regarding maps used for notice; teleconference with J. Madigan regarding certificate of convenience and necessity process.             | 0.50     | \$137.50   |
| 09/18/2024 | MLP      | Review Order No. 12; review requests for information for response to Order No. 12.   | 1.20     | \$330.00   |
| 09/19/2024 | YAL      | Receive and review Order No. 12 and calendar deadline.   | 0.10     | \$17.50    |
| 09/19/2024 | MLP      | Review initial responses to requests for information ; review documents provided with responses.   | 4.20     | \$1,155.00 |
| 09/20/2024 | MLP      | Review tariff, bylaws, Texas Administrative Code, and Water Code regarding providing service to non-member.  | 1.80     | \$495.00   |
| 09/23/2024 | YAL      | Receive and review the Commission Staff's Supplemental Recommendation on Sufficiency of Notice and Proposed Procedural Schedule, calendar deadlines, and email to clients. | 0.20     | \$35.00    |
| 09/23/2024 | ERS      | Review Commission Staff's Supplemental Recommendation on Sufficiency of Notice and Proposed Procedural Schedule; email to board regarding same.                            | 0.40     | \$160.00   |
| 09/23/2024 | JJC      | Receive and review correspondence from PUC staff regarding   | 0.20     | \$105.00   |

|            |     |  |                                    |                  |
|------------|-----|--|------------------------------------|------------------|
|            |     | notice sufficiency.  |                                    |                  |
| 09/25/2024 | YAL | Receive and review Order No. 13, calendar deadlines, and email to client.  | 0.20                               | \$35.00          |
| 09/30/2024 | MLP | Review Order No. 13, research notice requirements; teleconference with J. Walker regarding same; prepare correspondence to J. Walker regarding same. | 2.80                               | \$770.00         |
|            |     |  | <b>Line Item Discount Subtotal</b> | <b>-\$247.50</b> |

| Time Keeper     | Quantity | Rate     | Discount        | Total             |
|-----------------|----------|----------|-----------------|-------------------|
| John Carlton    | 0.2      | \$525.00 | -               | \$105.00          |
| Michael Parsons | 13.5     | \$275.00 | -\$247.50       | \$3,465.00        |
| Erin Selvera    | 0.4      | \$400.00 | -               | \$160.00          |
| Yolanda Lara    | 1.2      | \$175.00 | -               | \$210.00          |
|                 |          |          | <b>Subtotal</b> | <b>\$3,940.00</b> |

## 0105 - PUC Docket 56727 - Refunds from Docket 50788

| Date       | Attorney | Description  | Quantity | Total    |
|------------|----------|--|----------|----------|
| 09/05/2024 | MLP      | Review staff's recommendation and memo on sufficiency of compliance report.  | 0.20     | \$55.00  |
| 09/13/2024 | MLP      | Review Order No. 5; correspond with L. Cantrell and J. Walker regarding ratepayer representatives' alleged deficiencies; work on response.   | 1.40     | \$385.00 |
| 09/13/2024 | JJC      | Receive and review correspondence from PUC regarding compliance; work regarding same.  | 0.30     | \$157.50 |
| 09/17/2024 | YAL      | Receive and review Order No. 5, update the file, and calendar deadlines.   | 0.20     | \$35.00  |
| 09/18/2024 | MLP      | Review ratepayer representatives' alleged deficiencies in compliance report; review and revise response.   | 1.80     | \$495.00 |
| 09/20/2024 | YAL      | Receive and review the second compliance report and accompanying documents, finalize, update the file, file with the Public Utilities Commission, and email same to T. Xu; file the Response to Alleged Deficiencies with the Public Utilities Commission and email same to T. Xu. | 1.00     | \$175.00 |
| 09/20/2024 | MLP      | Review and revise response to ratepayer representatives alleged  | 2.30     | \$632.50 |

|            |     |  |      |          |
|------------|-----|--|------|----------|
|            |     | deficiencies with compliance report; review second compliance report.                                    |      |          |
| 09/30/2024 | YAL | Receive and review Commission Staff's Statement of Position, update the file, and email to Directors.    | 0.20 | \$35.00  |
| 09/30/2024 | MLP | Review Staff's Statement of Opinion; prepare correspondence to J. Walker and L. Cantrell regarding same. | 0.60 | \$165.00 |

| Time Keeper     | Quantity | Rate            | Total             |
|-----------------|----------|-----------------|-------------------|
| John Carlton    | 0.3      | \$525.00        | \$157.50          |
| Michael Parsons | 6.3      | \$275.00        | \$1,732.50        |
| Yolanda Lara    | 1.4      | \$175.00        | \$245.00          |
|                 |          | <b>Subtotal</b> | <b>\$2,135.00</b> |
|                 |          | <b>Subtotal</b> | <b>\$8,350.00</b> |
|                 |          | <b>Total</b>    | <b>\$8,350.00</b> |

## Statement of Account

|                     |              |                   |                                 |
|---------------------|--------------|-------------------|---------------------------------|
| Outstanding Balance | New Charges  | Payments Received | <b>Total Amount Outstanding</b> |
| ( \$0.00            | + \$8,350.00 | ) - ( \$0.00      | ) = <b>\$8,350.00</b>           |

## Detailed Statement of Account

### Current Invoice

| Invoice Number | Due On     | Amount Due | Payments Received               | Balance Due       |
|----------------|------------|------------|---------------------------------|-------------------|
| 11042          | 10/02/2024 | \$8,350.00 | \$0.00                          | \$8,350.00        |
|                |            |            | <b>Outstanding Balance</b>      | <b>\$8,350.00</b> |
|                |            |            | <b>Total Amount Outstanding</b> | <b>\$8,350.00</b> |

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!