



INVOICE

Invoice # 11257
Date: 01/08/2025

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
12/03/2024	YAL	Email to Directors regarding December 17 meeting.	0.10	\$16.50
12/10/2024	JJC	Receive and review correspondence from J. Walker regarding temporary manager issues.	0.40	\$170.00
12/11/2024	YAL	Receive and review the December 17 agenda, update the file and calendar, and meeting with E. Selvera regarding same.	0.70	\$115.50
12/11/2024	JMS	Review draft December meeting agenda; attention regarding revised version of same.	0.20	\$37.00
12/11/2024	ERS	Review and revise draft agenda.	1.40	\$455.00
12/12/2024	ERS	Telephone call with Y. Lara regarding lawsuit, agenda, project list, and completed documents; prepare summary of lawsuit for project list.	0.80	\$260.00
12/12/2024	JJC	Teleconference with J. Walker; receive and review correspondence from J. Walker.	0.60	\$255.00
12/13/2024	YAL	Email from J. Walker regarding December 17 agenda and review same.	0.50	\$82.50
12/17/2024	JJC	Teleconference with J. Walker regarding board meeting.	0.30	\$127.50
12/18/2024	JJC	Teleconference with J. Walker regarding board meeting.	0.40	\$170.00
12/19/2024	JJC	Teleconference with J. Walker regarding pending issues; receive and review correspondence from B. Garceau; draft response.	0.40	\$170.00
12/20/2024	KAN	Confer with E. Selvera regarding December meeting;	0.40	\$62.00
12/26/2024	JJC	Receive and review correspondence from L. McCauley regarding legal representation; draft response.	0.20	\$85.00

Time Keeper	Quantity	Rate	Total
John Carlton	2.3	\$425.00	\$977.50
Jennifer Schein	0.2	\$185.00	\$37.00
Erin Selvera	2.2	\$325.00	\$715.00
Yolanda Lara	1.3	\$165.00	\$214.50
Kirsten Nelson	0.4	\$155.00	\$62.00
		Subtotal	\$2,006.00

0101 - Windermere Oaks WSC - Special Projects

Date	Attorney	Description	Quantity	Total
12/02/2024	ERS	Email from R. Hicks; review correspondence filed with Commission and associated memorandum.	0.20	\$65.00
12/03/2024	ERS	Review PUC rules regarding intervention and deadline for requesting a hearing.	0.50	\$162.50
12/06/2024	MLP	Review 3rd party notice of Public Information Act request from PUC regarding A. Hicks' request and provide to directors.	0.30	\$63.00
12/09/2024	YAL	Compile and prepare multiple deadline and pending project information for December 19 meeting.	0.70	\$115.50
12/09/2024	JMS	Review information regarding temporary manager and status of corporation issues.	0.20	\$37.00
12/09/2024	ERS	Prepare additional summary information for meeting with temporary manager.	0.40	\$130.00
12/11/2024	YAL	Meeting with E. Selvera reending deadlines for all projects and update current list; receive and review AWR agreement and update our files.	0.50	\$82.50
12/11/2024	ERS	Preparation for meeting with temporary manger, evaluate list of pending items, confer with Y. Lara regarding updates to project list, evaluate revised deadlines and additional action items, email to J. Walker regarding agreement with operator, evaluate agreement, review documents in follow up to meeting.	4.20	\$1,365.00
12/12/2024	YAL	Research original answer filed in Docket No. 57624; additional meeting with E. Selvera regarding pending projects.	0.40	\$66.00
12/16/2024	YAL	Research and gather documents needing execution.	0.70	\$115.50
12/17/2024	YAL	Receive and review the Title Commitment, Survey, and Tax	0.10	\$16.50

		Certificate and update the file.		
12/26/2024	JMS	Review of correspondence related to appointment of temporary manager.	0.10	\$18.50

Time Keeper	Quantity	Rate	Total
Michael Parsons	0.3	\$210.00	\$63.00
Jennifer Schein	0.3	\$185.00	\$55.50
Erin Selvera	5.3	\$325.00	\$1,722.50
Yolanda Lara	2.4	\$165.00	\$396.00
		Subtotal	\$2,237.00

0106 - Windermere Oaks WSC - PIA Requests

Services

Date	Attorney	Description	Quantity	Total
12/05/2024	JMS	Receive and review correspondence from J. Gimenez regarding previous Public Information Act requests; receive and review correspondence from D. Flunker regarding previous Public Information Act requests.	0.30	\$55.50
12/06/2024	JMS	Discussion and attention regarding Public Information Act request received from D. Flunker November 20; review responsive information and draft correspondence to Attorney General requesting a ruling on same; draft correspondence to other parties regarding same; review Public Information Act correspondence from A. Hicks; email to D. Flunker; email to J. Walker.	3.30	\$610.50
12/09/2024	JMS	Review and compile information regarding status of pending Public Information Act requests.	0.50	\$92.50
12/12/2024	JMS	Draft written comments correspondence to Attorney General regarding November 20 Public Information Act request from D. Flunker.	0.40	\$74.00
12/13/2024	JMS	Email to J. Walker; continue drafting written comments correspondence to Attorney General regarding November 20 Public Information Act request from D. Flunker; phone call from J. Walker.	4.80	\$888.00
12/19/2024	JMS	Receive and review correspondence from L. Bates regarding Public Information Act request from D. Flunker; attention	0.50	\$92.50

		regarding same.		
12/19/2024	JJC	Receive and review correspondence from L. McCauley regarding public information act request; draft response.	0.30	\$127.50
12/20/2024	JMS	Attention and discussion regarding Public Information Act correspondence from J. Gimenez and T. Peters; review law on the Public Information Act; email to L. Bates.	0.70	\$129.50
12/23/2024	JMS	Receive and review correspondence regarding J. Gimenez Public Information Act request from L. Bates; attention and discussion regarding same; email to L. Bates.	0.90	\$166.50
12/23/2024	ERS	Confer with J. Schein regarding email from temporary manager about Public information Act requests.	0.20	\$65.00
			Services Subtotal	\$2,301.50

Expenses

Type	Date	Description	Quantity	Rate	Total
Expense	12/06/2024	Attorney General EFiling Fee.	1.00	\$7.50	\$7.50
Expense	12/13/2024	Attorney General EFiling fee.	1.00	\$5.00	\$5.00
				Expenses Subtotal	\$12.50

Time Keeper	Quantity	Rate	Total	
John Carlton	0.3	\$425.00	\$127.50	
Jennifer Schein	11.4	\$185.00	\$2,109.00	
Erin Selvera	0.2	\$325.00	\$65.00	
			Subtotal	\$2,314.00

0107 - Windermere Oaks WSC - IRS Examination

Date	Attorney	Description	Quantity	Total
12/09/2024	YAL	Receive voicemail from new IRS agent and update the file with contact information.	0.10	\$16.50
12/09/2024	ERS	Voicemail from T. Nesbitt regarding change of IRS agents assigned to case; telephone call with same regarding status of pending cases; email to J. Carlton regarding same, telephone call to J. Walker regarding same, telephone call with J. Walker,	1.50	\$487.50

update to team regarding all pending matters.

12/17/2024	ERS	Review IRS notification letter, email to Board regarding same.	0.20	\$65.00
12/17/2024	ESE	Receive and process IRS notice regarding review of District exemption qualification.	0.20	\$33.00

Time Keeper	Quantity	Rate	Total
Erin Selvera	1.7	\$325.00	\$552.50
Elle Eades	0.2	\$165.00	\$33.00
Yolanda Lara	0.1	\$165.00	\$16.50
Subtotal			\$602.00

0102 - PUC Docket 55454 and Compliance Docket 56167

Date	Attorney	Description	Quantity	Total
12/11/2024	YAL	Review and draft 2025 Election Procedures	1.50	\$262.50
12/19/2024	ERS	Email from J. Walker regarding election procedures.	0.40	\$160.00
12/23/2024	KEH	Confer regarding status of proceeding and scope of work to be completed.	0.20	\$40.00
12/23/2024	ERS	Email from and to J. Walker regarding election procedures.	0.20	\$80.00
12/24/2024	KEH	Review communication regarding submission of election materials; review Order, prepare initial draft of correspondence regarding same, and forward for attorney review; finalize and submit same for filing with PUC and forward to interested parties per Certificate of Service.	1.30	\$260.00
12/24/2024	ERS	Review Commission Order regarding election, 2024 election procedures, and prepare documents to file 2024 Election Procedures in interchange.	1.10	\$440.00

Time Keeper	Quantity	Rate	Total
Erin Selvera	1.7	\$400.00	\$680.00
Katy Hennings	1.5	\$200.00	\$300.00
Yolanda Lara	1.5	\$175.00	\$262.50
Subtotal			\$1,242.50

0103 - PUC Docket 55840 - CCN Amendment

Date	Attorney	Description	Quantity	Total
12/03/2024	MLP	Research PUC rules and Texas Administrative Code.	1.80	\$495.00
12/06/2024	MLP	Review status of certificate of convenience and necessity amendment and provide update.	0.30	\$82.50
12/11/2024	ERS	Email from J. Walker to PUC regarding CCN amendment.	0.10	\$40.00

Time Keeper	Quantity	Rate	Total
Michael Parsons	2.1	\$275.00	\$577.50
Erin Selvera	0.1	\$400.00	\$40.00
		Subtotal	\$617.50

0105 - PUC Docket 56727 - Refunds from Docket 50788

Date	Attorney	Description	Quantity	Total
12/05/2024	YAL	Finalize and efile Windermere's Motion for Adoption of Protective Order, update the file with the file marked copy, and send courtesy copies to parties of record.	0.50	\$87.50
12/05/2024	MLP	Obtain documents for filing billing register and alternate billing agreements; research protective orders; review and revise protective order; draft motion to adopt protective order; begin drafting written statement detailing exemptions from Public Information Act and establishing confidentiality.	8.40	\$1,547.70
12/05/2024	KEH	Office conference regarding need to file Motion for Protective Order; compile initial documents and forward for attorney review; prepare initial draft of Protective Order and forward for attorney review and handling.	1.50	\$300.00
12/06/2024	YAL	Meeting with M. Parsons regarding confidential document preparation.	0.40	\$70.00
12/06/2024	MLP	Finish drafting written statement detailing exemptions from Public Information Act and establishing confidentiality and file same; Review status of compliance docket for refund and surcharge and provide update.	1.70	\$374.00

12/09/2024	YAL	Additional work on confidential documents and bates stamping same, finalize, and efile along with cover letter to PUC filing system.	1.80	\$315.00
12/09/2024	MLP	Draft cover letter for filing responsive documents to Order No. 7 confidentially; review documents for proper notations required by Order No. 8 (protective order) for filing documents confidentially.	3.40	\$748.00
12/18/2024	YAL	Receive and review ratepayer representatives letter to Administrative Law Judge Ta, update the file, and email to Directors.	0.20	\$35.00
12/18/2024	ERS	Review December 17, 2024 letter from ratepayers to Commission.	0.20	\$80.00
12/19/2024	YAL	Receive and review the Protective Order Certificate, update the file, email confirming email addresses, and email confidential documents to all parties that submitted certificates.	0.30	\$52.50
12/20/2024	YAL	Email to PUC Staff sending confidentially filed documents.	0.20	\$35.00
Line Item Discount Subtotal				-\$1,042.80

Time Keeper	Quantity	Rate	Discount	Total
Michael Parsons	13.5	\$275.00	-\$1,042.80	\$2,669.70
Erin Selvera	0.2	\$400.00	-	\$80.00
Katy Hennings	1.5	\$200.00	-	\$300.00
Yolanda Lara	3.4	\$175.00	-	\$595.00
Subtotal				\$3,644.70
Subtotal				\$12,663.70
Total				\$12,663.70

Statement of Account

Outstanding Balance	New Charges	Payments Received	Total Amount Outstanding
(\$21,456.81	+ \$12,663.70)- (\$0.00	= \$34,120.51

Detailed Statement of Account

Other Invoices

Invoice Number	Due On	Amount Due	Payments Received	Balance Due
11110	11/05/2024	\$31,833.75	\$22,000.00	\$9,833.75
11186	12/05/2024	\$11,623.06	\$0.00	\$11,623.06

Current Invoice

Invoice Number	Due On	Amount Due	Payments Received	Balance Due
11257	01/08/2025	\$12,663.70	\$0.00	\$12,663.70

Outstanding Balance \$34,120.51
Total Amount Outstanding \$34,120.51

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!