

Oak Creek Club Homeowners Association  
14505 Mary Bowie Parkway  
Upper Marlboro MD, 20774

**Budget and Finance Committee Meeting**  
**Monday, May 4, 2026 @ 7:00 PM**

**Call To Order: 7:00 P.M.**

**Establish Minute Taker:**

**Review & Approval of March 2026 Meeting Minutes:**

**Matters for Committee Discussion/Information:**

- Review & Discuss March 2026 financial reports
- Debrief B&F 2026 – 2027 SP Initiatives
  - Review 2027 budget calendar
- Summary of Reserve Study
- Morgan Stanley Briefing – Brokerage vs Advisory Financial Services (7:30-8PM)
  - Reminder - non-committee residents hold questions until Resident Forum

**Resident Forum:**

(Approx. 15 – 20 min. Approx 2mins per household)

**Matters for Committee Recommendations:**

- B&F Recommendations for the Board

**Committee/Management Follow-up & Next Steps:**

- Any new business items from B&F

**Adjournment: 8:30PM**