



BUILDING GENERATIONAL WEALTH IN YOUR COMMUNITIES:

Through Fractionalized Ownership Awareness,
Avoidance and Mitigation (FOAAM) Model



Hollerbach & Associates, Inc.
Title Research, Abstracting & Settlement Services



We Know Texas Better.



OUR PANEL



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Criminal Justice and Executive
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Community Partnerships



Crystal Requejo
Chief Operating Officer of
Programs & Development
MAUC



Aisha Sanchez
Lead Housing Coordinator
MAUC



Jim Hollerbach
President & Chief Executive
Officer
Hollerbach & Associates



WHAT DO YOU NEED?



Legal Expert

Attorney thta will review documents and meet your clients in a culturally competent manner.



Non Profit

Trusted entitty in the community that can educate and be available to the communities needs.



Title Search Company

Title report is needed to do the vetting and assists the attorney



Triggers

Know your communities needs and listen to what they need. Get their input and know the triggers that affect them.

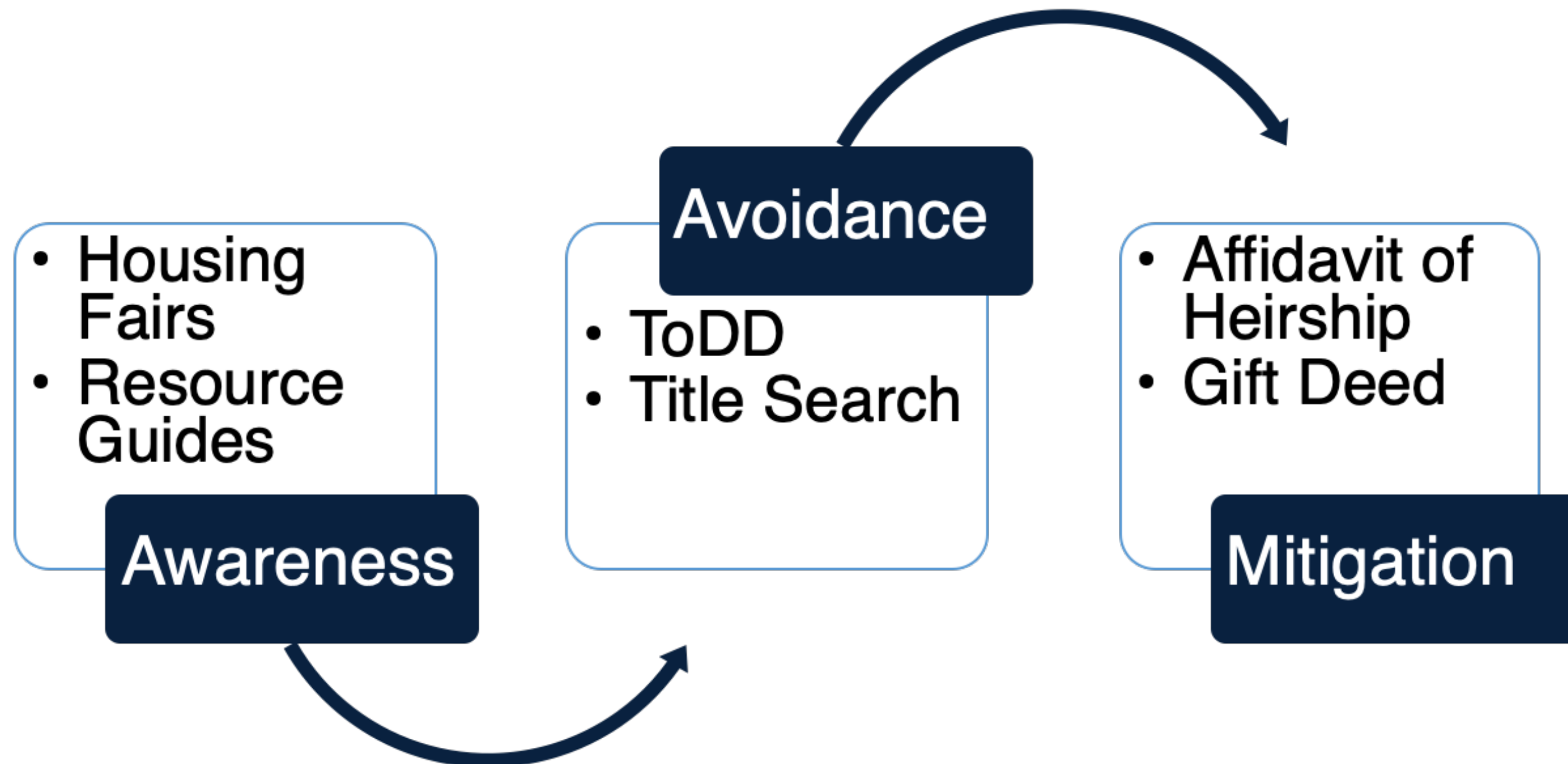
■ ■ ■ LEGAL PARTNER

OVERARCHING POLICY TO PRESERVE MARKETABLE TITLE

- Communities are ecosystems that require maintaining a delicate balance.
- Equilibrium requires attracting new residents, while simultaneously keeping original residents.
- Historically marginalized communities are most at-risk.
- This requires interventions that are intentional about preserving community wealth and assisting original residents in navigating changes in the ecosystem.



Fractionalized Ownership Awareness, Avoidance and Mitigation (FOAAM)



BRINGING FOAAM TO SCALE

- Identify, recruit and train more nonprofits that have the capacity and CULTURAL COMPETENCY to offer FOAAM system.
- Identify, recruit and train more pro-bono attorneys to assist nonprofits with FOAAM system.
- Identify private bar attorneys that have the expertise to litigate complicated cases and DISSEMINATE BEST PRACTICES.
- Invest in COMMUNITY APPROPRIATE MEDIA RESOURCES (print, TV, social media) to raise awareness.
- Consider providing financial incentives to nonprofits that meet criteria and choose to implement FOAAM system.
- Recruit partner to provide help desk, expertise and logistical support to nonprofits and pro-bono attorneys.





OTHER CHALLENGES

- Early in the process, we discovered that 43% of homeowners that we assisted NEVER filed the documents at courthouse.
- FOAAM address legal issues but does not address FAMILIAL ISSUES.
- Historically marginalized communities are most at-risk, consider a PURELY PLACE-BASED criteria.



NON- PROFIT: TRUSTED PARTNER



Mission

MAUC's mission is to empower our communities through housing, education, and economic opportunity.

Vision

MAUC will be a beacon of hope for helping people improve their lives and their community.

Core Values

Respect
Culture
Transparency
Collaboration
Innovation

Building Stronger Communities

HOUSING COMMUNITIES

Create and preserve housing communities for low-to-moderate income working families and offer a continuum of place-based supportive services to enable them to become successful, self-sufficient members of their communities.

OBJECTIVE: TO CREATE OR PRESERVE 1,000 NEW AFFORDABLE HOUSING UNITS IN MAUC'S COMMUNITIES.

EDUCATION, EMPOWERMENT & ADVOCACY

Empower individuals by strengthening the family unit, improve educational opportunities for lifelong learning and quality of life for all residents.

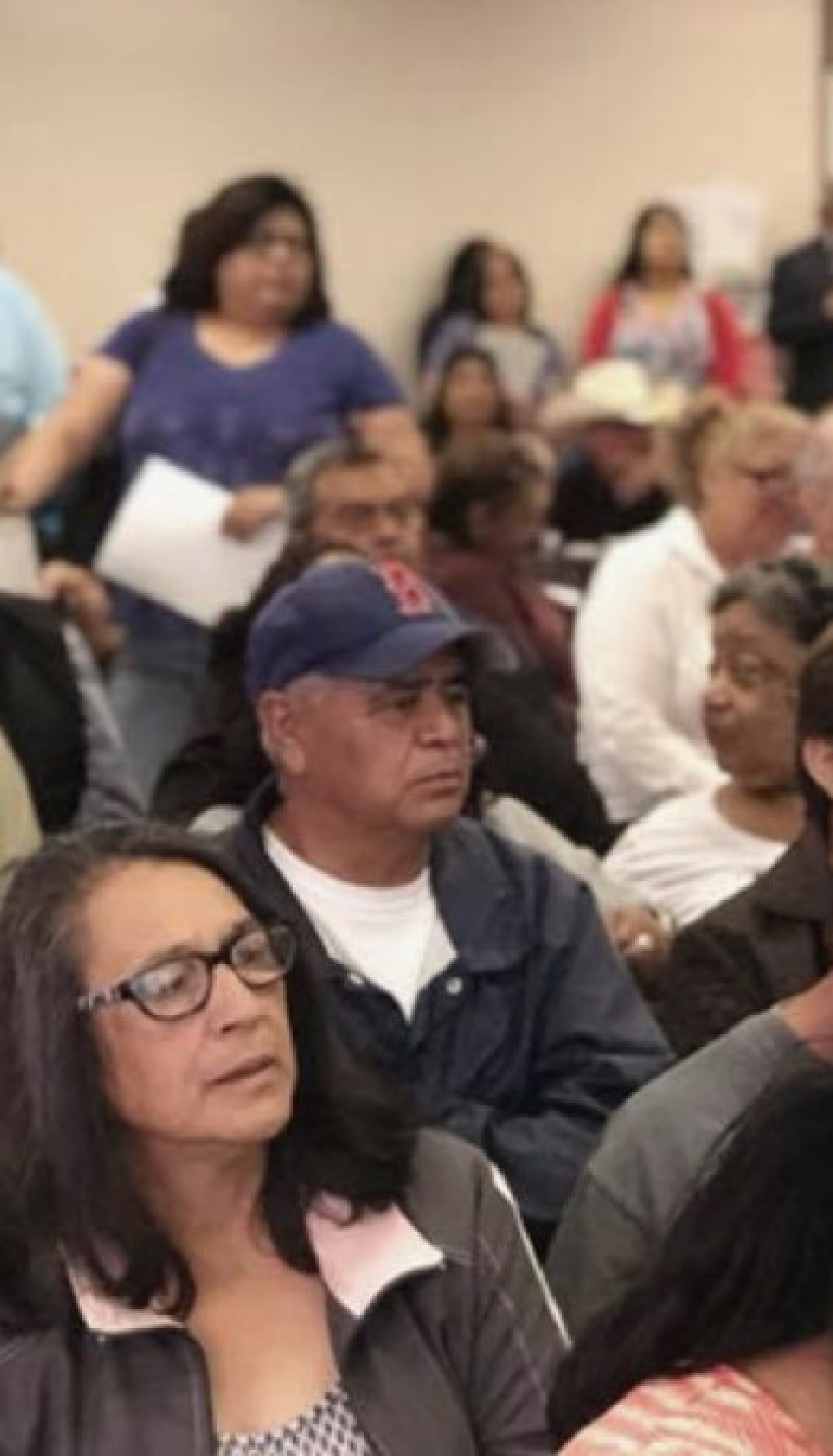
OBJECTIVE: CONTINUE TO EVALUATE THE EFFECTIVENESS OF ALL MAUC PROGRAMS AND EMPHASIZE SOCIAL DETERMINANTS OF HEALTH IN RELATION TO MAUC'S STATED MISSION, VISION AND GOALS.

ECONOMIC OPPORTUNITY

Improve wealth creation opportunities in MAUC's communities with a strong economy and enhance prosperity and quality of life for all residents.

OBJECTIVE: COORDINATE, COLLABORATE AND ESTABLISH PARTNERSHIPS TO DEVELOP AN ECONOMIC MASTER PLAN FOR MAUC'S COMMUNITIES.





Homestead Preservation Center



Connect Low to Moderate Income residents to housing resources appropriate to their needs.

Leverage greater investment in housing; both Single Family and Multi-Family, that respects the cultural and historical assets of the Westside. Protect vulnerable communities from predatory activity and prevent involuntary displacement.

Connect LMI residents to housing resources fitting to their needs

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Preserved over \$100M in
assets.
Since fall of 2018





Provide targeted assistance to heirs property owners and other vulnerable households in gentrifying neighborhoods to make sure they access the homestead exemption benefits they are eligible for and do not fall behind on their property taxes.

-Dr. Heather Way

Texas Anti-Displacement Toolkit





EDUCATING THE COMMUNITY ABOUT ESTATE PLANNING:

Three documents that are provided
to assist with heirship issues.



Affidavits of Heirship (AOH)



Transfer on Death Deeds (TODDs)



Gift Deeds



Notarize in house



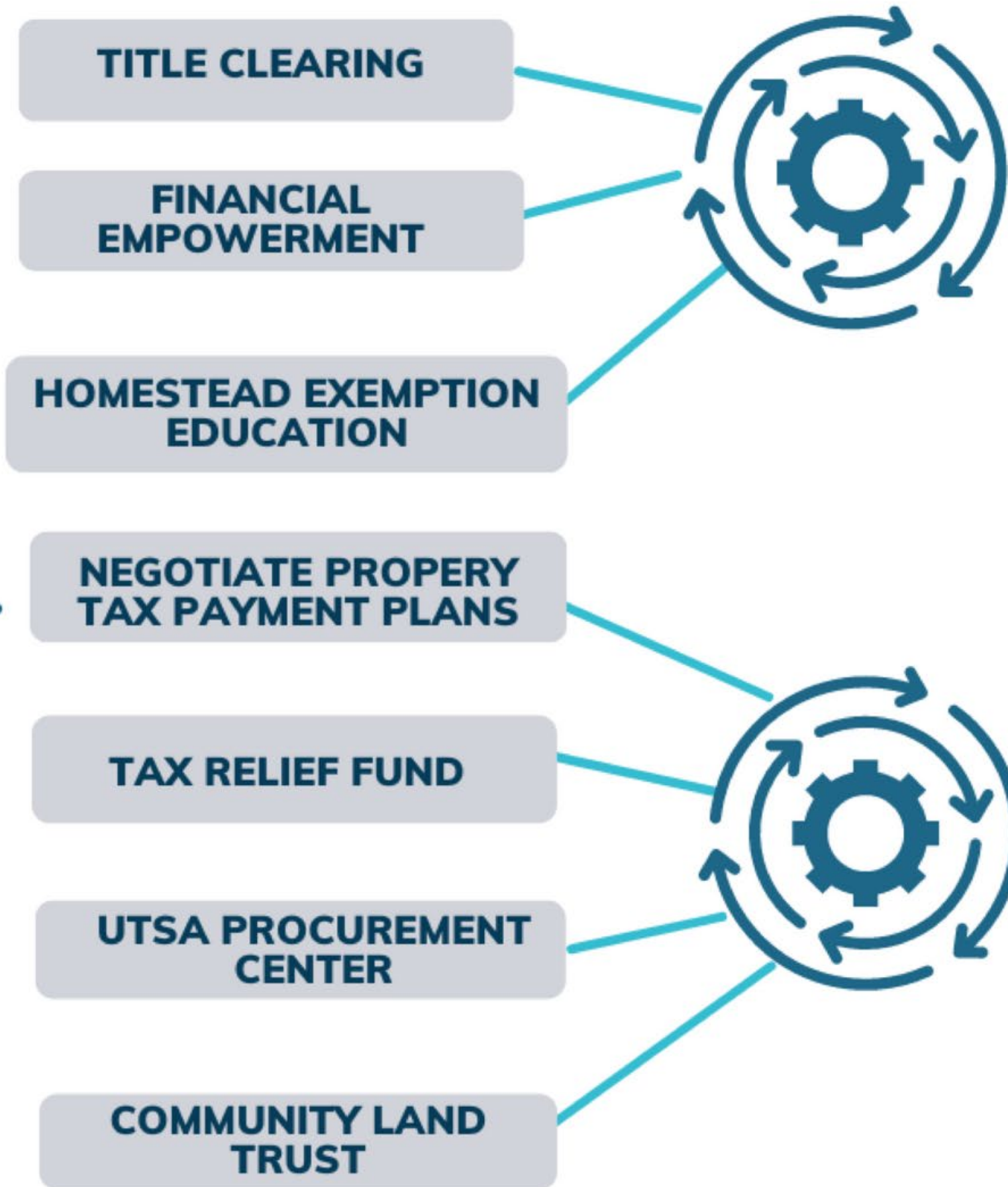
Title Search



File documents and pay fees



**MAUC HOMESTEAD
PRESERVATION CENTER
(HPC)**



MAUC HOMESTEAD HEIRSHIP PROGRAM CLIENT BENEFITS





TITLE REPORT COMPANY

Why is it important to conduct a title search?

Why does it benefit all parties to have one done?



THANK YOU

For more information feel free to contact us at:

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