



**Your Partner in Community
Association Management**



Contact us to see how we can help you

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Professional

Organized

Responsive

Conscientious

Accountable

Motivated

▲ Community Specific Planning:

- Management and financial transition planning and coordination
- Existing governance policies assessment
- Community financial condition review
- Comprehensive, strategic review of physical plant and maintenance programs
- Common property and capital improvements evaluation report
- Association employee requirements recommendation
- Board prioritized, goal oriented management plan development
- Preparation of annual operating and reserve expense budgets
- Administrative and maintenance calendar creation
- Annual review of communication and governance effectiveness

▲ Sound Fiscal Accountancy:

- Association income and expense and reserve funds transfer tracking
- Monthly financial statement report preparation and delivery
- Complete financial record maintenance
- Timely review and response to owner account inquiries
- Delinquent account notification and collection administration
- Coordination with attorney to facilitate legal collections of delinquent accounts, lien recordation, and court appearances, when necessary
- Assist in identifying third-party investment advisors and coordinating investment placement
- Automatic debit system and bank lockbox processing for assessment fee collection
- Employee payroll services coordination
- Preparation for and assistance with annual audits conducted by third-party providers

▲ Effective Operational Coordination:

- Assistance in Board's identification, negotiation and employment of service contractors
- Vendor performance evaluations and insurance certificate verification
- Training, supervision and criteria based evaluation of association employees
- Insurance claims reporting and administration
- Preparation of regular management reports
- Attendance at regularly scheduled board and annual meetings
- Organization of committee development
- Administrative support of committee functions and reporting
- Local, state and federal regulatory requirement updates
- Guidance in Board development of community policies and procedures
- Advise Board on improvements in governance, accountancy and communication options
- Administration of covenant and rules enforcement
- Board leadership and management orientation for new and returning members
- Guidance in effective meeting management
- Monitoring of 24-hour, 7-day-per-week emergency response system
- Establishment of community repair and request point-of-contact
- Owner and resident database maintenance
- Development and dissemination of association communications, including newsletters, meeting agendas, community updates and Web-based access to association information
- Coordination of resident orientation program
- Timely response to owner and resident concerns and questions
- Governing document maintenance and resale certificate preparation
- Arrange annual review of Association insurance policies, coverage, and pricing
- Coordinate preparation and support for annual meetings and board member elections