



# Association Management Services Provided

## FINANCIAL

- Maintain accounting records for each individual member through our accounting software AppFolio
- Provide owners with information to set up online payment portal if they desire. Payment can be processed with e-checks and debit/credit cards.
- Assess past due accounts and send past due statements, 30 Day Notices and work with attorney's office in the event the account is turned over for collections.
- Send rent demands to leased units of delinquent owners
- Work with attorneys to file liens and any legal actions to ensure the associations' interest are protected
- If necessary, foreclose on delinquent members and provide an income from the foreclosed properties to the association
- Provide monthly financial statements and reports to Board Members through the Board of Directors portal in AppFolio
- Forward accounting records to the associations accountant to facilitate in tax preparation
- Assist Homewise Docs in the preparation of Estoppel Certificates when requested by attorneys, title companies, mortgage companies or any entity authorized to request those documents and ensure the document is prepared in accordance with the state statutes governing the preparation of Estoppel certificates.
- Assist Board of Directors in creating an annual budget
- Receive payments for assessments, update member's financial records, deposit receipts in a timely manner and give accounting of all income and expenses
- Review and pay vendors invoices
- Reconcile monthly bank statements

## OWNER RELATIONS

- Maintain correspondence records for each individual owner using electronic technology
- Process new homeowner information to update owner files
- Send out welcome packages to new owners
- Track undeliverable mail and update per property appraiser

## ARCHITECTURAL REVIEW

- Assist homeowners in the submission process for an ARC request
- Transmit ARC request to the committee for approval through AppFolio
- Track ARC requests via timeline to notify committee of impending deadline for auto-approval if time is approaching expiration
- Notify owner via phone call or email of committee's decision and follow up with a letter to notify owner of ARC decision

## COVENANTS, CONDITIONS AND RESTRICTIONS

- Notify owners when they are not in compliance with CC&R's

- Retain documentation of violations as it pertains to specific owners for follow-up with repeat violations through AppFolio.
- Provide information to attorney when necessary to enforce compliance with CC&R's to protect the interest of the association

#### INSURANCE

- Maintain insurance policies and negotiate renewals
- Advise Board of negotiated renewals in order to save the association money and provide equal or better coverage

#### MAINTENANCE

- Service properties by using reputable vendors who are licensed and insured
- Repairs requiring a contractor will be placed out for bid
- Inspect work prior to payment to determine discrepancies between bid and actual work performed

#### INSPECTIONS

- Make routine inspections of the association property by a representative of our office with violations being noted and pictures taken in order to notify members of non-compliance with Covenants, Conditions and Restrictions, determine if improvements have been made to properties without the approval of the ARC committee and notify members of non-compliance with ARC regulations.
- Prepare and mail notices to owners of violations of the governing documents
- Notify the associations attorney, at the direction of the Board of Directors, when violations have not been cured by owners and the association must seek remedy as provided in the associations' documents to ensure the statutory requirement has been met that the Board of Directors uniformly and without discrimination enforces said covenants.

**AppFolio** is a software system that is designed specifically for homeowner's and condominium association management and covers all aspects of management, providing owners, boards and ARC's the availability of online portals to access information. Our inspections are performed using the software and uploads are provided to our office in real-time, recording the violation and the photos associated with the violation. We have been utilizing this product for over 6 years and have found it to excel in being an extremely useful tool for the management company, boards, committees and homeowners.

When owners sign up using their email and provide us with a signed email authorization form, we have the ability to communicate with them via email, thus saving the association the associated expense of postage and copies.