



Service Highlights

Books Only

DIY Management

Full Management

Financial Services

| | | | |
|---|-------------------------------------|-------------------------------------|-------------------------------------|
| Reporting: Balance Sheet, Budget vs. Actual Performance, Reserve Reporting, Copies of Invoices, Utility Reports | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Collections: Late letters, delinquency reports (30/60/90), attorney reports | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Daily Deposits/Payment Posting: Increase cash flow, Fast access to money | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Invoice Processing: Approval of Invoices by Manager, all invoices scanned for paperless storage and all invoices sent to the treasurer for full support of bills paid | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Annual Budget Preparation | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Annual Tax Preparation & Corporate filings | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Totally Free Banking Relationship: No check stock costs, no statement fees, online access to view balances, | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

Manager/Customer Service

| | | | |
|---|-------------------------------------|-------------------------------------|-------------------------------------|
| Dedicated Manager/Cust. Service Agent | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Real Estate Services: Lender Questionnaires, Status Letters, Welcome packets to new owners | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| 24 Hour Emergency Service: 3rd party service | | | <input checked="" type="checkbox"/> |
| Maintenance | | | <input checked="" type="checkbox"/> |
| Modification/Architectural Requests | | | <input checked="" type="checkbox"/> |
| Violations | | | <input checked="" type="checkbox"/> |
| Meeting Attendance | | | <input checked="" type="checkbox"/> |
| Board Meeting Support: Management Reports, Agenda, Meeting Minutes Archived, Record Retention | | | <input checked="" type="checkbox"/> |
| Annual Meeting Support: Agendas, Notices, Voting/Registration, Archive Meeting Minutes, Power Point Presentations | | | <input checked="" type="checkbox"/> |
| Communication: Community Mailings, Newsletters, Notices, etc. | | | <input checked="" type="checkbox"/> |
| FHA Project Approvals | | | <input checked="" type="checkbox"/> |
| Reserve Studies | | | <input checked="" type="checkbox"/> |



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Vendor Services

| | | | |
|---|-------------------------------------|-------------------------------------|-------------------------------------|
| All 3rd party Vendors | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Competitive Bids | | | <input checked="" type="checkbox"/> |
| Approved Vendors: vendor registration and ongoing tracking of proof of insurance coverage | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

Educational/Affiliations

| | | | |
|--|-------------------------------------|-------------------------------------|-------------------------------------|
| Free Seminars/Workshops | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Membership with Community Association Institute (C.A.I.) | CPM- Membership | CPM- Membership | CPM- Membership |

Web Services: Not all websites are created equal

| | | | |
|---|-------------------------------------|-------------------------------------|-------------------------------------|
| Informational: Governing Documents, Policies & Rules, General Information | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Vendor Recommendations: Listing of Approved Vendors | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Owner Balances | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Approved Vendor List | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| 3rd Party Access: Attorney Access to Unit ledgers | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Owner Directory: Contact Information, etc | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Monthly Financials Archived | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Maintenance: Reporting, Tracking, Archived | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Modification/Architectural Requests: Reporting, Tracking, Archived | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Violations: Reporting, Tracking, Archived | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Board Meeting Support: Management Reports, Agenda, Meeting Minutes Archived, Record Retention | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Annual Meeting Support: Agendas, Notices, Voting/Registration, Archive Meeting Minutes, Power Point Presentations | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Communication: Community Mailings, Newsletters, Notices, etc. | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Committee Reporting: Social, Financial, Violation, Maintenance Committees are able to access specific information | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |