

# Community Intake Form Management Solutions, NW

Thank you for your interest in solution-based management services. We look forward to meeting with you soon and discussing who we are and what we can offer to your community association. Please take a few moments to answer as many questions below as you feel comfortable with. Better understanding your community, the Board and the challenges you face will help us develop a proposal that best supports the level of service your community requires.

**Point of Contact:** \_\_\_\_\_ Phone: \_\_\_\_\_  
Email: \_\_\_\_\_

## Community Details:

1. Legal name of community: \_\_\_\_\_
2. Number of Lots or Units: \_\_\_\_\_
3. Please check off any of the following that the Association is responsible for:

Building Exteriors	Clubhouse	Community Pool
Parks / Fields	Playground Equipment	Private Streets
Protected Areas	Storm Ponds	Wetlands

## Governance:

1. # of Board members: \_\_\_\_\_ Names: \_\_\_\_\_
2. Currently managed by: Management Company  
Self-managed
3. Do you have a current Reserve Study? Yes No Not sure
4. Has the Association conducted an Audit of the financials recently? Yes No

## Financial Analysis:

1. Assessments are currently: \$ \_\_\_\_\_ Per Year Per Month
2. Budgeted allocation for Management this year: \$ \_\_\_\_\_
3. Approximate number of delinquent accounts: \_\_\_\_\_
4. Approximate A/R balance (total of delinquent balances): \$ \_\_\_\_\_
5. Any special assessments in place or expected? No YES, for \_\_\_\_\_

## Additional Details:

1. What is the Boards primary motivation for considering new management?
2. What do you feel are the Boards biggest challenges right now?
3. What date would you like to receive a proposal by?
4. How did you hear about us? Referred by: \_\_\_\_\_ Internet Search Received a mailing  
CAI Listing Other: \_\_\_\_\_

**Thank you!**

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**Management Solutions NW**

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