

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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