HOA Management Transition Checklist

Changing management companies does not need to be overwhelming. With a clear plan and defined responsibilities, an association can maintain continuity for homeowners, vendors, finances, and the board throughout the transition.

Alchemy Community Partners helps coordinate each stage of the transition, keeps responsibilities organized, and works with the board to reduce disruption.

1. Review and Plan

☐ Review the current management agreement and notice requirements.

☐ Establish the board's priorities for a new management partner.

☐ Approve the new management agreement and transition timeline.

2. Coordinate Records and Finances

☐ Transfer governing documents, financial records, homeowner information, contracts, and association files.

☐ Confirm association bank accounts, authorized users, balances, payment processing, and financial controls.

☐ Track any missing records or unresolved items.

☐ Confirm homeowner account balances, outstanding invoices, delinquency records, and pending deposits.

3. Maintain Community Operations

☐ Confirm that vendor services, maintenance, utilities, and active projects continue without interruption.

☐ Review pending homeowner requests, violations, collections, and architectural applications.

☐ Identify any urgent or seasonal property needs.

4. Communicate With Homeowners

☐ Announce the management transition and effective date.

☐ Provide updated contact, payment, and portal information.

☐ Explain how homeowners should submit questions and service requests.

5. Begin the New Partnership

☐ Meet with the incoming management team to review community priorities.

☐ Confirm board communication, reporting, and approval procedures.

☐ Monitor the first financial reports, homeowner payments, and vendor services.

☐ Complete a 30-day transition review and identify any missing records, unresolved balances, vendor issues, or process adjustments.

You Do Not Have to Navigate the Transition Alone

Every association is different. Alchemy works with the board to develop a practical transition plan, coordinate records and responsibilities, communicate with homeowners and vendors, and keep the process moving forward.

The board remains informed and in control. Alchemy manages the details assigned under the transition plan.

Considering a Management Change?

Contact Alchemy Community Partners for a confidential conversation about your association's needs and transition timeline.