

QUESTIONNAIRE FOR POTENTIAL CLIENTS

Name of Caller: _____

Telephone Numbers: (H) _____ (W/C) _____

ASSOCIATION INFORMATION

Name of Association: _____

Location: _____

Type of Association: _____ No. of Units _____

Present Management Services _____

Monthly Assessment _____

Date for Annual Meeting _____

Board Members Required _____ Current # _____

President _____ V. President _____

Treasurer _____ Secretary _____

At Large _____ At Large _____

Board Meeting Requirements _____
(# of meetings per year, etc.)

Present Capital Reserves _____

CD's or Current Money Market Accounts _____

Professional Agreements

Attorney _____

Insurance _____

Existing Contracts (If yes, name of provider)

Landscape _____

Snow _____

Pool _____

Security _____

Other _____

Recreation, Amenities, Facilities (If yes, name of provider)

Pool _____

Clubhouse _____

Other _____

Law Suits _____ Yes _____ No _____ How Many?

Insurance Claims _____ Yes _____ No _____ How Many?

ADDITIONAL INFORMATION

When can we meet with you on the property?

Declaration: _____ Bylaws: _____

Budget: _____ Current Financial Report: _____

REASONS FOR CHANGE

What are you looking for in management? _____

What are your top 3 most consistent issues and what would you like to see done to resolve these issues:

1. _____

2. _____

3. _____

SELECTION PROCESS

Where did you get our name? _____

What is the timeframe for making the decision? _____

