

\_\_\_\_\_ANNUAL CALENDAR” (Jan. - Dec.)

**January:**

- Order loss history from insurance agent
- Review reserve study - calendar projects for the year

**February:**

- Obtain bids for insurance renewal

**March:**

- Submit insurance quotes to board for review
- Taxes due by the 15<sup>th</sup> of March

**April:**

- Pest control contract expires

**May:**

- Insurance expires on the 22<sup>nd</sup> of May
- Board review Rules & Regulations and Violations Policy

**June:**

- Obtain bids for reserve study
- Landscape contract expires

**July:**

- Submit reserve study bids to board
- Send out the call for candidates for board of directors

**August:**

- Start budget preparation - contact service providers and utility companies regarding rate increases for following year
- Send out annual meeting notice
- Board review reserve study

**September:**

- Board review collection policy
- Annual meeting
- Submit draft budget to board for review
- Board review and approve reserve study

**October:**

- Board approves budget for following year, including any monthly assessment increases
- Obtain bids for taxes

**November:**

- Mail budget package to members by the 30th of November (no less than 30 nor more than 90 days prior to the beginning of fiscal year)
- Mail required annual disclosures to members by the 30<sup>th</sup> of November

**December:**

- Verify assessment rate with accounting before January 1<sup>st</sup>
- Adjust reserve contributions per the reserve study and the new budget