

## **Officers & Their Roles**

Typically, the Officers are also members of the Board; however, this may not be a requirement of your HOA's governing documents. Officers are appointed/elected by the Directors and not by the Members unless otherwise stated in the Bylaws. The appointment and responsibilities of the Officers are generally stated below and may be more specifically described in the Bylaws.

### **President**

- Acts as the liaison with the Manager
- Creates the agenda for meetings\*
- Presides at all meetings of the Board and the HOA (including the annual meeting) by controlling the meetings and keeping an orderly pace to conduct business\*
- Represents the HOA on all issues outside the association
- Sets a positive example for other volunteers and HOA members
- Looks to other Directors and Members for future leadership positions in the HOA
- Signs all official documents of the HOA
- Acts as an ex-officio member of all HOA committees

### **Vice President**

- Performs the duties of the President and chairs the meetings of the Board and HOA if the President is absent
- Appears on President's behalf if President is not able to do so
- Works with the President to be able to take on responsibilities of his/her role after the President's term is complete and the Vice President assumes the role of President
- Acts as Board liaison to various committees
- Performs other duties as required in the Bylaws

### **Secretary**

- Attests to the authenticity of all HOA documents
- Certifies all meeting notices and election results as required by the Bylaws
- Prepares or is responsible for preparation of Board meeting minutes\* and signs all Board minutes
- Prepares or is responsible for all "official" HOA communications with the Members\*
- Maintains the "Book of Resolutions or Policies"\*

### **Treasurer**

- Acts as the Chief Financial Officer (CFO) of the HOA

- Assumes responsibility for the collection of and expenditure of HOA assessments\*
- Reviews and monitors HOA financial statements with the President and Property Manager
- Signs checks and promissory notes with the President
- Recommends investment policies based on professional advice\*  
Prepares and recommends the annual budget, collection policies, and year-end financial statement to the Members\*
- Reports to the Board at each meeting on budgetary matters. Summarizes financial statements as part of the treasurer's report to include a review of the balance sheet (includes cash-on-hand and reserves), unusual accounts receivable and payable, and any unusual variances in the collection and expenditure of HOA funds\*

\*Can be delegated to the Property Manager

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