



ASSOCIATION MANAGEMENT SERVICES, LLC

OUR MISSION

*To be the local leader
in association management
by providing the highest level of service
to all of our associations and their members.*

Newsletter - Issue 4, December 2022



*We wish you a
Merry Christmas
and a Happy
New Year!*

What a year! This year seems to have flown by, and all of us at Association Management Services would like to thank you for choosing us to assist your community.

We work hard to earn your trust and provide professional association management services. In 2022, we were excited to add a new office location in Pace. This means that we now proudly serve Bay, Walton, Okaloosa, Santa Rosa, and Escambia Counties. This year also saw growth in the number of associations we manage, which now tops over 70 area associations. With this success, we continue to learn from all our associations, so we can help implement best practices at similar associations. We are also proud to be locally owned and support our community with various activities, such as food and toy drives benefitting various non-profit organizations.

As we look toward 2023, we hope this newsletter finds you and your community thriving. On behalf of all of us at AMS, we wish you a Merry Christmas and a Happy New Year!

THE ROLE OF THE BOARD

One of the most common questions we receive is how to explain the role of the Board of Directors for Homeowners Associations, Condo Associations, and Cooperatives.

Associations are run by a Board of Directors who is elected by homeowners. They ensure compliance with governing documents, ensure maintenance for common areas or elements of the community, and conduct the financial business of the association.

Association boards have both officers and directors. These members are to act in good faith and make decisions on residents' behalf for the entire community. Below are some key roles:

- **President:** The leader who oversees all community affairs
- **Secretary:** The member who keeps records
- **Treasurer:** The member who handles the Association's finances

Depending on the size of community, associations may have committees that serve specialized functions within the association, such as an Architectural Review Committee, Social Committee, etc. Committees typically include both Board and Non-Board Members and may comprise a Board Member Liaison as well as a Chairperson who distributes reports to the Board.

At Association Management Services, we work directly with our members' Board of Directors, and they can rely on our licensed CAMs to supply them with knowledgeable and professional assistance.

MEET OUR TEAM

We have a family-like culture and are proud to have very high staff tenure due to our commitment to our employees, as well as our customers. Our in-house team includes experienced accounting, administrative, and licensed CAMs.

SANTA ROSA BEACH:

Nikki Lawniczak, CAM, Principal
Jammie Agerton, CAM, Portfolio Manager
Denice Beard, CAM, Portfolio Manager
Heather McDonald, CAM, Portfolio Manager
Connie Brown, CAM Assistant
Cathy Bass, Administrative Assistant

PACE:

Patricia Jennings, CAM, Portfolio Manager
Kayli Steele, Office Manager

PANAMA CITY:

Lahrye Radford, CPCU, CAM, Principal
Heather Leatherberry, CAM, Portfolio Manager
Brian Rose, Administrative Assistant

SUPPORTING ALL OFFICES:

Melissa Diumano, Accounting Specialist
Kayla Baker, Accounting Assistant
John Lucia, Information Technology

LOCAL OFFICES TO BETTER SERVE YOU

We have been operating locally for two decades, and we believe our firsthand knowledge of and insight into our communities helps us better serve our associations.



Santa Rosa Beach Office (above):

2441 US Highway 98W
Santa Rosa Beach, FL 32459

Pace Office (right):

4369 5th Avenue
Pace, FL 32571



OUR SERVICE STANDARDS

No service company can accomplish its goals without established and understood services standards for the organization – below are ours.

1. Completion of BOD minutes for board review – 3 days after the applicable meeting.
2. Submission of Financial Statements – to BOD by the 20th of each month, except December; Preliminary year end by 20th final by January 31st.
3. Return phone calls – if received in the AM, return by 3:00 in the PM; If received in the PM return by 11:00 the next AM.
4. Return email correspondence – same as phone calls.
5. BOD meeting package – 3 days prior to meeting.
6. Reconciliation of bank statements – within 7 days of receipt.
7. Financial statements uploaded to the website – by the 22nd of the month.
8. Projects and tasks – as negotiated with a BOD.
9. Emergencies (water leaks, power outages, etc.) – done immediately.
10. Financial data to CPA for returns – prior to February 1 of the appropriate year.
11. Completion of the Annual Corporate Filing – on or before May first of each year.