

## FINANCIAL STATEMENT AUDIT, REVIEW, AND COMPILATION ENGAGEMENT LETTER REQUEST

**Please provide a proposal for the following service(s):**

- |  |  |
|--|--|
| <input type="checkbox"/> Audited Financial Statements  | <input type="checkbox"/> Compiled Financial Statements |
| <input type="checkbox"/> Reviewed Financial Statements | <input type="checkbox"/> Tax Preparation               |

For Fiscal Year Ended (Month/Year) \_\_\_\_\_

**General Information**

- This Association has never had a financial statement audit, review, or compilation.
- This Association had an audit, review, or compilation last year. (Please provide a copy.)

If the Association has had a prior review, audit, or compilation performed,  
 has the CPA who performed this service been paid? \_\_\_\_\_

Are there any disagreements with the prior CPA over accounting principles? (Please describe below.)

Is the Association self-managed or managed by a community management company? \_\_\_\_\_

Please provide the name of the management company if applicable. \_\_\_\_\_

Association name: \_\_\_\_\_

Physical Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

President's Name: \_\_\_\_\_

Is this a condominium or planned unit development? \_\_\_\_\_ Total number of units: \_\_\_\_\_

Does the Association have any sub-Associations? \_\_\_\_\_ How many? \_\_\_\_\_

Is the Association a sub-Association? \_\_\_\_\_

Date Association was established (date declarations were filed with the county): \_\_\_\_\_

Will the financial statements be prepared on a cash, modified cash, or accrual basis of accounting? \_\_\_\_\_

Have there been any unusual items (e.g., litigation, special assessments, developer activity) during the year  
 being audited, reviewed, or compiled? \_\_\_\_\_

**Please send the proposal to:**

Name: \_\_\_\_\_ Email address: \_\_\_\_\_

Phone: \_\_\_\_\_ Address: \_\_\_\_\_

Position: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

**Please send the prior-year audited, reviewed, or compiled financial statements if applicable  
 or the year-to-date financials if not applicable. Please send a copy of the prior year tax return.**