



SCHWINDT & Co.

RESERVE STUDY SERVICES

Members of the Association of
Professional Reserve Analysts
/ Reserve Specialist
designation from CAI

RESERVE STUDY PROPOSAL REQUEST

Please provide a proposal for the following service:

- Level I - Full Reserve Study
- Level II - On-Site Reserve Study Update
- Level III - Off-Site Reserve Study Update
- Operating Budget
- Maintenance Plan
- Maintenance Plan Update

For Fiscal Year Beginning (Month/Year) _____

General Information

This Association had a professional reserve study prepared for a prior year: YES No
If YES, please provide a copy of the most recent reserve study.

Date of last on-site visit: _____

This Association had a maintenance plan prepared for a prior year: YES No
If YES, please provide a copy of the most recent maintenance plan.

This Association had an inspection report and/or maintenance manual prepared for a prior year: YES No
If YES, please provide a copy of the most recent inspection report and/or maintenance manual.

Is the Association managed by a community management company? YES No
If YES, please provide the name of the management company. _____

Association name: _____

Physical Address: _____

City: _____ State: _____ Zip Code: _____

Is this a condominium project or planned unit development? _____

Does the Association have any sub-Associations? YES No
If Yes, how many? _____ Is the Association a sub-Association? YES No

Year(s) common elements were constructed/added: _____

Was/is this a conversion project? YES No If YES, date of Conversion: _____

Total no. of units: _____ Total no. of buildings: _____ Total no. of stories: _____
Residential/Commercial

The project/development contains (check all that apply):

- Single Family Homes
- Townhomes
- Multi-use buildings
- Condominiums
- Commercial units
- Residential units

Please provide a general idea of the common elements maintained by the Association:

- Pool
- Clubhouse
- Tennis/basketball court
- Building exteriors
- _____
- _____
- _____
- _____

Please send the proposal to:

Name: _____ Email address: _____
Phone: _____ Address: _____
Position: _____ City: _____ State: _____ Zip Code: _____

Please send the most recent reserve study, maintenance plan, inspection report, maintenance manual, and the Association's governing documents as requested above, if applicable.