



RESERVE STUDY PROPOSAL REQUEST

Please provide a proposal for the following service:

- | | | |
|--|--|--|
| <input type="checkbox"/> Level I - Full Reserve Study | <input type="checkbox"/> Level III - Off-Site Reserve Study Update | <input type="checkbox"/> Maintenance Plan |
| <input type="checkbox"/> Level II - On-Site Reserve Study Update | <input type="checkbox"/> Operating Budget | <input type="checkbox"/> 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):

- | | | |
|--|--|--|
| <input type="checkbox"/> Single Family Homes | <input type="checkbox"/> Multi-use buildings | <input type="checkbox"/> Commercial units |
| <input type="checkbox"/> Townhomes | <input type="checkbox"/> Condominiums | <input type="checkbox"/> Residential units |

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

- | | |
|--|--------------------------------|
| <input type="checkbox"/> Pool | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Clubhouse | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Tennis/basketball court | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Building exteriors | <input type="checkbox"/> _____ |

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.

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