

## Community Association Management Services

Service Description	À la carte Service	Financials Only	Full Service
Customized website/app for your community <ul style="list-style-type: none"> <li>- Community Information and News</li> <li>- Reservations for Common Elements</li> <li>- Maintenance Requests</li> <li>- Financial Data via Accounting Integrations</li> <li>- Mass Email Communication</li> <li>- Violations</li> <li>- Knowledgebase for Policies &amp; Rules</li> <li>- Association Governing Documents (CC&amp;R's, Bylaws, etc.)</li> <li>- Approval Workflows</li> <li>- Payments from Any Device</li> <li>- Secure, Accurate, &amp; Efficient</li> <li>- Access For Attorney</li> </ul>	Available	✓	✓
Invoice Processing	Available	✓	✓
Financial Bookkeeping <ul style="list-style-type: none"> <li>- Balance Sheet</li> <li>- Budget vs. Actual Performance</li> <li>- Reserve Reporting</li> <li>- Copies of Invoices</li> <li>- Utility Reports</li> </ul>	Available	✓	✓
Collection Services <ul style="list-style-type: none"> <li>- Late Notices</li> <li>- Delinquency Reports</li> <li>- Coordination of Collection Services</li> </ul>	Available	✓	✓
Annual Budget Preparation	Available	✓	✓
Annual Tax Preparation	Available	✓	✓
Corporate Filings	Available	✓	✓
Association Focused Banking Solutions	Available	✓	✓

Dedicated Association Manager <ul style="list-style-type: none"> <li>- Provides Board/Association Guidance</li> <li>- Attends All Meetings</li> </ul>	Available	✓	✓
Real Estate Services <ul style="list-style-type: none"> <li>- Lender Questionnaires</li> <li>- Status Letters</li> <li>- Welcome Meeting/Packet To New Owners</li> </ul>	Available	✓	✓
Coordination of In-house & 3rd Party Maintenance Vendors	Available	✗	✓
Modification/Architectural Requests	Available	✗	✓
Violations	Available	✗	✓
Board Meeting Support <ul style="list-style-type: none"> <li>- Management Reports</li> <li>- Agendas</li> <li>- Meeting Minutes</li> <li>- Records Retention</li> </ul>	Available	✗	✓
Annual Meeting Support <ul style="list-style-type: none"> <li>- Meeting Agendas</li> <li>- Meeting Notices</li> <li>- Voting/Registration</li> <li>- Meeting Minutes</li> <li>- Community Presentations As Needed</li> </ul>	Available	✗	✓
Communication & Messaging <ul style="list-style-type: none"> <li>- Community Website</li> <li>- Community Mailings</li> <li>- Social Media</li> <li>- Text Messaging</li> <li>- Newsletters</li> <li>- Special Notices</li> </ul>	Available	✗	✓
Facilitate Competitive Bid Processes	Available	✗	✓
Manage Vendors	Available	✗	✓
FHA Project Approvals	Available	✗	✓

Community Reserve Studies	Available	✘	✔
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