√ CLIENT CHECKLIST

So that we may begin preparing your reserve study,
please forward as much of the following information as possible:

- ☐ **Original copy of the signed contract, together with 50% retainer.**
- ☐ Copy of the client's operational guidelines (i.e. Declaration, Bylaws, Articles of Incorporation) ***and/or other documents detailing the client's maintenance responsibilities.*** i.e.: A list of components the board definitely wants included in reserve plan.
- ☐ **Name and phone number of client contact for questions regarding reserve components.**
- ☐ Most recent monthly financial statements: Balance Sheet, Income Statement, Budget.
- ☐ Reserve component Worksheets and Detail Summaries, if available.
- ☐ Copies of past reserve studies, if available.
- ☐ Names, addresses, phone numbers of the client's pertinent service contractors (i.e. pool, irrigation, sealcoating, roofing, siding/painting, etc.) as applicable.
- ☐ Site map of client's property with phase development detail, if available.
- ☐ Access devices (i.e. pool gate, pump room, clubhouse keys, gate card and/or entry codes, etc.) as applicable.
- ☐ Any additional information, ***historical maintenance records***, or documents which may help us in the compilation and completion of your reserve analysis study.

If you have any questions, please feel free to call us.

Kindly direct all information to:

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