



SERVICE COMPARISONS



Service Highlights	Books Only	Full Management
Financial Services	✓	✓
Reporting: Balance Sheet, Budget vs. Actual Performance, Reserve Reporting, Copies of Invoices, Utility Reports	✓	✓
Collections: Late letters, delinquency reports (30/60/90), attorney reports	✓	✓
Daily Deposits/Payment Posting: Increase cash flow, Fast access to money	✓	✓
Invoice Processing: Approval of Invoices by Manager, all invoices scanned for paperless storage and all invoices sent to the treasurer for full support of bills paid	✓	✓
Annual Budget Preparation	✓	✓
Annual Tax Preparation & Corporate filings	✓	✓
Totally Free Banking Relationship: No check stock costs, no statement fees, online access to view balances	✓	✓
Manager/Customer Service		
Dedicated Manager/Customer Service Agent	✓	✓
Real Estate Services: Lender Questionnaires, Status Letters, Welcome packets to new owners	✓	✓
24 Hour Emergency Service: 3rd party service		✓
Maintenance		✓
Modification/Architectural Requests		✓
Violations		✓
Meeting Attendance		✓
Board Meeting Support: Management Reports, Agenda, Meeting Minutes Archived, Record Retention		✓
Annual Meeting Support: Agendas, Notices, Voting/Registration, Archive Meeting Minutes, Power Point Presentations		✓
Communication: Community Mailings, Newsletters, Notices, etc.		✓
FHA Project Approvals		✓
Reserve Studies		✓

*For full terms and pricing, please see contract



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Service Highlights	Books Only	Full Management
Vendor Services		
All 3rd party Vendors	✓	✓
Competitive Bids		✓
Approved Vendors: vendor registration and ongoing tracking of proof of insurance coverage	✓	✓
Educational/Affiliations		
Free Seminars/Workshops	✓	✓
Membership with Community Association Institute (C.A.I.)	CPM-Membership	CPM-Membership
Web Services: Not all websites are created equal		
Informational: Governing Documents, Policies & Rules, General Information	✓	✓
Vendor Recommendations: Listing of Approved Vendors	✓	✓
Owner Balances	✓	✓
Approved Vendor List	✓	✓
3rd Party Access: Attorney Access to Unit ledgers	✓	✓
Owner Directory: Contact Information, etc	✓	✓
Monthly Financials Archived	✓	✓
Maintenance: Reporting, Tracking, Archived		✓
Modification/Architectural Requests: Reporting, Tracking, Archived		✓
Violations: Reporting, Tracking, Archived		✓
Board Meeting Support: Management Reports, Agenda, Meeting Minutes Archived, Record Retention		✓
Annual Meeting Support: Agendas, Notices, Voting/Registration, Archive Meeting Minutes, Power Point Presentations		✓
Communication: Community Mailings, Newsletters, Notices, etc.		✓
Committee Reporting: Social, Financial, Violation, Maintenance Committees are able to access specific information		✓

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