

ASSOCIATION RESPONSIBILITY ASSIGNMENTS

ADVANCED MANAGEMENT OF SOUTHWEST FLORIDA, INC.

Association Name: _____

Mailing Address: _____

President Name: _____ Telephone: _____

Vice President Name: _____ Telephone: _____

Secretary Name: _____ Telephone: _____

Treasurer Name: _____ Telephone: _____

___ Condominium ___ Homeowner's Association ___ Master or Recreation Association

Number of Board Members ___ Assessments Paid: ___ Annually ___ Quarterly ___ Monthly ___

Number of Board Meetings Per Year _____ Other Meetings Per Year _____ Type/Nature _____

Number of Units _____ Number of Vendor Checks Per Month _____

ACTIVITY		<i>Responsible Entity</i>		
		<i>Mgmt. Company</i>	<i>Outside Contractors Or On-Site</i>	<i>Board of Directors Or Volunteers</i>
<i>FINANCIAL</i>				
1.	Assessment Collection			
2.	Delinquency Follow-up			
3.	Lien Filings			
4.	Foreclosure Proceedings			
5.	Bill Approval			
6.	Bill Payment			
7.	Payroll Accounting for On-Site Personnel			
8.	Financial Report Preparation			
9.	Coordinate Tax Return Preparation			
10.	Year-end Financial Report			
11.	Year-end Audit, Review or Compilation			
12.	Budget Preparation			
13.	Reserve Analysis (Long – range planning)			
<i>ADMINISTRATIVE</i>				
1.	Board of Directors Meeting Attendance			
2.	Special Meeting Attendance			
3.	Annual Meeting Attendance			
4.	Minute Transcription			
5.	Minute Typing			
6.	Annual Meeting Coordination			
7.	Member Roster Maintenance			
8.	Tenant Application Approval Process			
9.	Records & File Maintenance			
10.	Resales: Preparation & Processing of Transfer Information			

ACTIVITY		Responsible Entity		
		Mgmt. Company	Outside Contractors Or On-Site	Board of Directors Or Volunteers
ADMINISTRATIVE CONTINUED				
11.	Resident Information Pamphlet (Preparation & Distribution)	N/A		
12.	Resident Orientation	N/A		
13.	Newsletter a. Editing			
	b. Typing			
	c. Distribution			
14.	Mailings			
15.	Photocopying			
16.	Specification/Bid Preparation and Coordination			
17.	Contract Awarding			
18.	Yearly Management Plan			
19.	Standard Operating Procedures Reviews			
20.	Periodic Inventory of Association Property			
21.	Legal (Attorney) Liaison			
22.	Municipality Liaison			
23.	After – hour Answering and Emergency Assistance Service			
24.	Work Orders: Recording and Processing			
25.	Rules and Regulations Enforcement			
26.	Association/Directors & Officers Insurance Liaison			
27.	General Correspondence			
28.	Hiring/Firing/Supervision of On-Site Personnel (if any)			
BUILDING MAINTENANCE				
1.	Painting			
2.	Repairs/Maintenance			
3.	Roof Cleaning			
4.	Inspection of Outside Contractor Performances			
5.	Periodic Building/Amenity Inspection			
GROUNDS MAINTENANCE				
1.	Lawn (full)			
2.	Ornamental Landscape (full)			
3.	Irrigation (full)			
4.	Lighting			
5.	Streets			
6.	Trash Collection			
7.	Inspection of outside Contractor Performance			
8.	Periodic Grounds Inspection			

ACTIVITY		Responsible Entity		
		Mgmt. Company	Outside Contractors Or On-Site	Board of Directors Or Volunteers
MISCELLANEOUS				
1.	Resales			
2.	Rentals/Leasing			
3.	Security Service			
4.	Information Concerning Laws and			
5.				
OTHER				
1.				
2.				
3.				
4.				
5.				