

# 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 \_\_\_\_\_

| <b>ACTIVITY</b>              |   | <i>Responsible Entity</i> |   |   |
|------------------------------|---|---------------------------|---|---|
|                              |   | <i>Mgmt.<br/>Company</i>  | <i>Outside<br/>Contractors<br/>Or<br/>On-Site</i> | <i>Board of<br/>Directors<br/>Or<br/>Volunteers</i> |
| <b><i>FINANCIAL</i></b>      |   |                           |   |   |
| 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)                  |                           |   |   |
| <b><i>ADMINISTRATIVE</i></b> |   |                           |   |   |
| 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.<br>Company   | Outside<br>Contractors<br>Or<br>On-Site | Board of<br>Directors<br>Or<br>Volunteers |
| <b>ADMINISTRATIVE CONTINUED</b> |  |                    |   |   |
| 11.                             | Resident Information Pamphlet (Preparation & Distribution) | <b>N/A</b>         |   |   |
| 12.                             | Resident Orientation                                       | <b>N/A</b>         |   |   |
| 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)    |                    |   |   |
| <b>BUILDING MAINTENANCE</b>     |  |                    |   |   |
| 1.                              | Painting   |                    |   |   |
| 2.                              | Repairs/Maintenance  |                    |   |   |
| 3.                              | Roof Cleaning  |                    |   |   |
| 4.                              | Inspection of Outside Contractor Performances              |                    |   |   |
| 5.                              | Periodic Building/Amenity Inspection                       |                    |   |   |
| <b>GROUNDS MAINTENANCE</b>      |  |                    |   |   |
| 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.<br>Company   | Outside<br>Contractors<br>Or<br>On-Site | Board of<br>Directors<br>Or<br>Volunteers |
| <b>MISCELLANEOUS</b> |                                 |                    |   |   |
| 1.                   | Resales                         |                    |   |   |
| 2.                   | Rentals/Leasing                 |                    |   |   |
| 3.                   | Security Service                |                    |   |   |
| 4.                   | Information Concerning Laws and |                    |   |   |
| 5.                   |                                 |                    |   |   |
| <b>OTHER</b>         |                                 |                    |   |   |
| 1.                   |                                 |                    |   |   |
| 2.                   |                                 |                    |   |   |
| 3.                   |                                 |                    |   |   |
| 4.                   |                                 |                    |   |   |
| 5.                   |                                 |                    |   |   |