



# Condominium & HOA Annual Review Checklist

## Incorporation

- Is the status active?
- Has it lapsed?
- Is officer information up-to-date?
- Is registered agent current?

## Insurance

- Is it time for an audit review?
- Are safeguards in place to prevent fraud?
- Any delinquent owners?
- Have you: got them on a payment plan, turned the account over to collections, and filed a lien?

## Maintenance and Reserves

### Maintenance Plan:

- Has it been updated or reviewed?
- Any changes to maintenance schedule?
- Any warranties about to expire?

### Reserve Study:

- Has it been updated or reviewed?
- Any major repairs needed?

## Communications

- Do you have the required insurance?
- Does it include: Property, Liability, D&O, and Fidelity?
- Are your policy limits sufficient?
- Any major renovations?
- Significant increase in funds?

## Finances

- Is your website domain name about to expire?
- Is your website content current?
- Is your owner and resident list current?
- Is your email list up to date?

Whether you need assistance with financial reporting, CC&R enforcement, or creating an annual budget, we can manage that for you!



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