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Please provide answers to the following questions. This will assist us in developing a more definitive management proposal.

Association Legal Name: _____

Cross Streets: _____

Contact Person: _____ Position: _____

Address: _____ City: _____ State: _____ Zip: _____

Contact phone number: _____ Email: _____

1. Total Units: _____ Type of Units: _____ Year(s) built: _____

2. Assessments/Dues: HOA Fee \$ _____ Special Assessment \$ _____

3. Number of Board members: _____ Number of Committees: _____ Average Committee Size: _____

4. Board meetings held: _____ monthly _____ every other month _____ quarterly _____ Other: _____

Location: _____ Time: From _____ to _____

5. The Annual Meeting is held during (Month) : _____

Location: _____ Time : _____ Estimated Attendance: _____

6. What major projects are scheduled in the next three years? i.e. painting, resurfacing, pools, playgrounds
Other _____

7. Do you have employees? _____ No _____ Yes If yes, how many _____ Position: _____

8. How would you rate the physical condition of the property? Buildings: _____ Grounds: _____

9. Has a Reserve Study been completed? _____ No _____ Yes When last updated _____ By whom _____

10. Are your Reserve Accounts being adequately funded? _____ No _____ Yes

11. Who did last year's audit and tax return? _____

12. Vendors: Attorney _____ Landscape _____

Insurance _____ Are there any outstanding claims _____ No _____ Yes

If yes, please provide an overview of claim: _____

13. Other than routine collection work is your Association involved in any litigation? _____ No _____ Yes

If yes, please provide an overview of the nature of the dispute: _____

14. Do the properties have reoccurring problems such as breaking water lines, rotten wood, peeling paint, or leaky roofs, etc.: _____ No _____ Yes: Explain: _____

15. Please describe the problems that need immediate attention: _____

16. What are your reasons for bidding management: _____

17. Rental factor in your Association: _____ % (estimate)

18. Explain rule violation problems in your Association and enforcement procedure

19. Do you publish a newsletter? _____ No _____ Yes How Frequently? _____

20. Who writes, publishes and distributes the newsletter? _____

21. Describe your amenities (i.e. pools, tennis courts, etc.) _____

22. Additional comments: _____

23. How did you learn of our company? _____

24. Referred by: _____

Date _____ Signature _____

Position with Association _____ Print Name _____