

THIRD PARTY MANAGEMENT - INITIAL QUESTIONNAIRE

1. Name: _____
2. Telephone Number: (O) _____ (H) _____

Tell Us About Your Association

3. Name of Association: _____
4. Location: _____
5. Type [HOA/Condo]: _____
6. Price Range of Homes: _____
7. Amenities: _____
8. Size of the Community [# of Units] _____

Tell us About Your Board

9. Why are you looking for management? _____

10. Are these reasons shared by all the Board Members? _____
11. What is your position with the association? _____
12. How many people are on your Board? _____
13. Who is the current manager? _____
14. On a scale of 1 to 10, how do you rate your present management company? _____
15. What makes them a number ()? _____
16. What needs to be done better to improve the rating? _____

17. When you made the decision to contract with them, what were some of the reasons?

18. Have you discussed the problems with them? _____
19. What do you like about your current management company? _____

Additional Information

20. When can we meet with you on the property? _____
21. Who is your association's attorney? _____

22. Are you involved in any lawsuits? _____
23. Who is the association's auditor? _____
24. Who is the association's insurance agent? _____
25. Where can we obtain a copy of:
- a. Declaration?
 - b. Bylaws?
 - c. Budget?
 - d. Financial Report?

Reasons for Change

26. What are you hoping to achieve by the change? _____
- _____

Selection Process

27. Where did you get our name? _____
28. What other companies are being invited to bid? _____
29. What is the decision making process? _____
30. When would you like to inspect our offices? _____
31. Are you more concerned with service or price? _____
32. To whom should we send the proposal/additional information on our company?
- a. Name _____
 - b. Address _____

Thank you for taking the time to complete this questionnaire!