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Community Transition Checklist

In order to set the accounts up and have adequate information for the operation of the community, we would like to have as much of the following information as possible:

- ⊗ Exact Legal name of Association (as Incorporated)
- ⊗ Federal tax ID# (Required)
- ⊗ Date of Incorporation
- ⊗ Physical mailing address if applicable
- ⊗ County where located
- ⊗ Fiscal year
- ⊗ Contract Start Date 10/1/2019
- ⊗ **Provide All:** Covenants /Articles of Incorporation / Bylaws/ Corporate Book
- ⊗ Dues Amount \$ Due date (billing cycle)
- ⊗ Late Date
- ⊗ Late Fee Amount \$ or %
- ⊗ Initiation fee \$ (if applicable)
- ⊗ Re-initiation fee (if applicable) \$
- ⊗ Number of lots at build out Number of Phases
- ⊗ Each Phase-number of lots
- ⊗ (Circle Type) Single Family Townhome Mixed Condo Other
- ⊗ For Condo and Townhome Units, is the Association responsible for:
 - Exterior Maintenance
 - Termite Bond
 - Hazard insurance
 - Are townhomes or condo units on a master water meter?
- ⊗ List all services provided for with HOA dues (attach detailed list)
 - Trash service: Owner or Association Responsibility
 - Lawn Maintenance: Owner or Association Responsibility
 - Landscaping Company
 - Retention or detention ponds #
 - Street Lighting:** how many Is the Association Responsible
- ⊗ Initial operating fund start up check for Association account amount\$
- ⊗ Closing attorney contact info

Community Start Up List Continued

➤ Provide detailed directions to community:

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- (Circle one) Private or public streets
- Gated Community (swipe cards or key pad)
- Copy of plat provide separately
- Average home price
- Latest Financials (attach)
- Homeowners database list
- Detailed Delinquency list/ documentation of correspondence
- Any budget info available
- Collections report (if applicable)
- Recreation area address (if applicable)
- Pool Company
- Amenities list (if applicable) circle 2 pool tennis cabana clubhouse lake trails playground
workout room (list all others)
- Physical Pool Address
- Provide set of keys or codes to amenities or access areas (if applicable)
- List of all current service providers/contact list/account numbers (attach separate sheet)
- Copies of any existing contracts with vendors (attach)
- All insurance info coverage, declaration page
- Signed copy of our contract (Received)
- Verbiage for main website page, digital pictures (if available)
- Sales agent and other contact information (if applicable)

Thank you for your time. Please contact our offices with any questions you may have.
All documents can be faxed to **4435881742** or emailed to **info@propertywize.net**

