

Cummings & Associates, Inc.

Association Information

The following information is requested to help us assess the current health of the association and provide a sound foundation for our consulting services:

- Resale Package
- Declarations (if not in the Resale Package)
- Articles of Incorporation (if not in the Resale Package)
- Bylaws (if not in the Resale Package)
- Budget (if not in the Resale Package)
- Audit (if not in the Resale Package)
- Financial Statement (as typically reviewed by the Board)
- Design Standards / Architectural Guidelines
- Book of Resolutions
- Rules and Regulations (whatever is currently published to the members)
- Amenities (list with size, capacity and use)
- Reserve Study (most recent)
- Board Meeting Packet (typical from a recent meeting)
- Management Report (typical for a recent board meeting)
- Board Meeting Minutes (from last three meetings)
- Contract Request for Proposal (typical)
- Major Contracts (e.g., landscaping, pool operation, snow removal, trash removal)
- Newsletter (twelve months)
- Annual Association Calendar
- Committee Charters
- Leadership Roster (list of directors, committee chairpersons and committee members with title and telephone number)
- Retained Professionals (names of legal counsel, accounting firm, auditor and insurance agent)
- Property Map
- Other (anything else that may be of help in understanding the association and its people)

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