



## ASSOCIATION PRE-MANAGEMENT QUESTIONNAIRE

Thank you for your interest in Schmidt-Rogers Management's services for your association. If selected as your management company it is our goal to exceed your expectations. The first step in this process is to understand those expectations – as well as the service requirements of your association. To this end, please help us by completing the questionnaire below. Thank you.

### **GENERAL INFORMATION:**

Legal name of the association \_\_\_\_\_

Currently managed by:

The developer \_\_\_\_\_ Self-managed \_\_\_\_\_ By a management company \_\_\_\_\_

Anticipated start date for the new management company \_\_\_\_\_

Why are you currently looking for a management company? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### **YOUR FACILITIES:**

Number of units: Residential \_\_\_\_\_ Commercial \_\_\_\_\_

What are the business hours for the commercial units?

Monday - Friday \_\_\_\_\_

Saturday \_\_\_\_\_ Sunday \_\_\_\_\_

Number of elevators \_\_\_\_\_

Swimming pool: Indoor \_\_\_\_\_ Outdoor \_\_\_\_\_

Common area restrooms \_\_\_\_\_ Fitness facilities \_\_\_\_\_

Laundry facilities \_\_\_\_\_ Kitchen facilities \_\_\_\_\_

Meeting room(s) \_\_\_\_\_ Clubhouse \_\_\_\_\_

Please list other common amenities (e.g. playgrounds, fire pits) \_\_\_\_\_

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Does the association maintain any of the following?

HVAC \_\_\_\_\_ Well \_\_\_\_\_ Water treatment system \_\_\_\_\_ Septic system \_\_\_\_\_

Does the association have an electronic entry system requiring programming? \_\_\_\_\_

Does the association have a remotely monitored security system? \_\_\_\_\_

Does the association have a remotely monitored smoke/fire alarm system? \_\_\_\_\_

Please check all utilities paid by the association:

Electricity \_\_\_\_\_ Natural Gas \_\_\_\_\_ Propane \_\_\_\_\_ Water \_\_\_\_\_ Sewer \_\_\_\_\_

Are common area janitorial services required? \_\_\_\_\_

If so, for what areas? \_\_\_\_\_

***YOUR SERVICE NEEDS:***

Are there common areas that the management company will need to lock/unlock on a daily basis? \_\_\_\_\_

Do you want the management company to provide unit access to those co-owners who have lost their keys/locked themselves out? \_\_\_\_\_ Will co-owners be billed? \_\_\_\_\_

How frequently would you like the management company to perform on-site inspections?

Weekly \_\_\_\_\_ Monthly \_\_\_\_\_ Other \_\_\_\_\_

Will the management company perform periodic inspections of individual units? \_\_\_\_\_

How many board and committee meeting would you like the management company to attend annually? \_\_\_\_\_

Besides inspections, board meetings and the annual co-owners meeting, do you want the management company on site for any other regularly scheduled event(s)? Please describe.

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**FINANCIAL INFORMATION:**

The association's fiscal year \_\_\_\_\_

Is your bookkeeping currently being done by:

Accountant \_\_\_\_\_ Professional bookkeeper \_\_\_\_\_ Management Company \_\_\_\_\_

Board member \_\_\_\_\_ Other \_\_\_\_\_

Date of the association's last financial review \_\_\_\_\_ Audit \_\_\_\_\_

Does the association earn income other than interest on bank accounts and investments? \_\_\_\_\_

Has the association had a reserve study done? \_\_\_\_\_ Date of study \_\_\_\_\_

Are co-owners currently making amortized payments on any special assessments? \_\_\_\_\_

Approximately what percentage of co-owners are regularly more than 30 days past due for payment of their regular assessment? \_\_\_\_\_

**MAINTENANCE AND REPAIR:**

Please check all of the following services for which the association regularly contracts:

Lawn maintenance \_\_\_\_\_ Tree/bush trimming \_\_\_\_\_ Planting beds \_\_\_\_\_

Weeding beds \_\_\_\_\_ Mulching beds \_\_\_\_\_ Flower pots/flower boxes \_\_\_\_\_

Application of insecticide \_\_\_\_\_ Small animal control \_\_\_\_\_ Pressure washing \_\_\_\_\_

Window cleaning \_\_\_\_\_ Dryer vent cleaning \_\_\_\_\_ Carpet cleaning \_\_\_\_\_

Pool/spa maintenance \_\_\_\_\_ Cleaning dog run area \_\_\_\_\_

Snow removal: Roads \_\_\_\_\_ Driveways/parking lot \_\_\_\_\_ Sidewalks \_\_\_\_\_

**MISCELLANEOUS:**

Is the association involved in litigation \_\_\_\_\_ Have liens been filed in last 12 months? \_\_\_\_\_

Does the association have any pending insurance claims \_\_\_\_\_

Are there any major capital improvement or deferred maintenance projects planned in the next 24 months, e.g. new roofs, painting? \_\_\_\_\_

Are there plans to amend the governing documents in the next 24 months? \_\_\_\_\_

**Thank you again for helping us better understand your association. Please return by fax: 231.929.1170; Email: schmidt@schmidtmanagement.com or mail: 996 Garfield Woods Dr. Suite D, Traverse City, MI 49686. If you have any questions please call us at 231.941.0707.**

**SCHMIDT-ROGERS MANAGEMENT**