

Duties of the Management Company

1. Assist the Board to ensure the Board duties and obligations as listed in the Association's governing documents are met.
2. Ensure that homeowners and vendors have 3 methods of contacting the Board via the management company by providing: 1) a mailing address, 2) a phone number, and 3) an email address.
3. Respond to homeowner questions and concerns in a timely manner and report all pertinent information to the Board.
4. Maintain and update all Association records, including lot files and general administrative files. Ensure Association documentation is updated to reflect the changes in ownership.
5. Maintain a roster of all homeowners with names, addresses, and phone numbers where available. Research any unidentified homeowners in an effort to obtain a current mailing address when necessary.
6. Provide an HOA disclosure packet to all new buyers, including all required association documentation according to state law. Ensure that this information is provided to the buyers within the timeframe specified by state law. Also send a Welcome letter, a copy of the most recent newsletter, an ACC approval form, and a survey to all new homeowners to determine the appropriate mailing address and phone number(s), and to determine whether the property will be used as a primary residence or a rental property. Inquire as to whether the new owners are able to assist the Board in any way.
7. Work with escrow officers, title companies, and real estate agents to facilitate change of ownership on properties within the Association. Includes providing outstanding balances on the properties, collecting outstanding assessments and other charges, providing insurance documentation, completion of title company and real estate questionnaires, and retaining a copy of the deed at the close of the sale.
8. Assist both buyers and sellers in obtaining any necessary Homeowners Association information during a sale or refinance process.
9. Provide CC&R documentation to individual homeowners at their request.
10. Publish a quarterly newsletter for all homeowners and residents; postage and copy costs borne by HOA.
11. Coordinate all mailings requested by the Board, including new policies, newsletters, annual budget, and announcements of annual meetings.

12. **Regarding CC&R compliance:** Perform 2 site tours per month, send out violation letters, and refer lots to the Compliance Committee and the Board if necessary.
13. Accrue and record any CC&R violation fines on a weekly basis. Monitor and report any progress made on these properties to the Board.
14. Facilitate the ACC approval process for homeowners and ensure proper follow up.
15. Locate and reserve meeting facilities for board and committee meetings as needed.
16. Ensure proper notice is given for all monthly Board meetings in accordance with state law and the Association's Bylaws. Coordinate the Annual Meeting, including mailing of agenda, facilitating check-in, and verifying homeowner eligibility for voting purposes. Includes verifying and accounting for all proxies. Ensure all provisions of the Association documents regarding the Annual Meeting are addressed in an appropriate manner (quorums met, posting and notice requirements met, etc.)
17. Attend monthly Board meetings and Committee meetings as requested by the Board. Prepare monthly board meeting packets which include: an agenda, minutes, monthly financials, site tour reports, and any other information pertinent to the meetings, agenda. Follow up on decisions made at Board/Committee meetings.
18. Provide a management report of all significant activity each month.
19. Ensure adequate Homeowners Association liability and Board of Directors (D&O) insurance coverage is maintained at all times.
20. Ensure federal and state tax filing are completed through the use of a CPA in a timely manner and ensure timely compliance to maintain Homeowners Association corporate charter.
21. Regarding Association financial records: Maintain and reconcile, with Treasurer oversight, the Association's bank accounts in order to track all income and expenses. Ensure expenses are paid in a timely manner. Provide to the Treasurer a check register of all checks written each month. Provide an accurate detail of all expenses charged to the Association. Post all payments received to homeowner accounts immediately and accurately. Deposit payments received into the appropriate bank account.
22. Provide a "petty cash" fund for small purchases, to be reimbursed by the HOA at the time of monthly invoicing.
23. Assist the Board in developing an annual budget based on the prior year's income and expenses and on anticipated changes in the upcoming year.
24. Coordinate with volunteers and committees within the Association to ensure that various activities are accomplished on time.

25. Assist the Board in the coordination of social functions, i.e., yard sales, holiday contest, etc.
26. Assist in obtaining bids for repair work and contract services: send out bid packets, collate bids submitted, and interview potential vendors when necessary.
27. Implement and maintain collection procedures for all amounts due to the Association, including sending out monthly statements, coordinating with any outside collection services provided, and reporting the status of past-due accounts on a monthly basis. Maintain an accurate listing of all active liens and ensure that liens are removed immediately after payment has been received.
28. Act as primary liaison with the Association's legal representation on any and all legal issues as directed by the Board and apprise the Board of any applicable Arizona state Statutes for Homeowners Associations as provided by HOA counsel.
29. Conduct homeowner orientation meetings as needed.