

Association / Property Name	
Address	
City, State, Zip	
Association Board Contact	
Phone	
Email	
Management Company	
Address	
City, State, Zip	
Management Contact	
Phone	
Email	

Reserve Study Cycle (site inspection every 3 years)

Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7
Level I Site Visit	Level III No Site Visit	Level III No Site Visit	Level II Site Visit	Level III No Site Visit	Level III No Site Visit	Level II Site Visit

Level of Reserve Study Requested

<input type="checkbox"/>	Level I – full reserve study (first site visit, develop component list, physical analysis, financial analysis)
<input type="checkbox"/>	Level II – reserve study update with site visit (use existing component list, physical analysis, financial analysis)
<input type="checkbox"/>	Level III – reserve study update no site visit (financial analysis)

Association Details

Number of Units		Building Style	
Number of Buildings			<input type="checkbox"/> High Rise
Number of Stories		<input type="checkbox"/> Apartment	<input type="checkbox"/> Single Family
Year Constructed		Are Buildings Association Responsibility?	<input type="checkbox"/> Yes
Year Converted			<input type="checkbox"/> No
Fiscal Year Month			
Need Report By			

Building Details	Property Details	Other Details / Comments
<input type="checkbox"/> Patios / Decks / Balconies	<input type="checkbox"/> Fencing	
<input type="checkbox"/> Interior Common Areas	<input type="checkbox"/> Private Streets / Asphalt	
<input type="checkbox"/> Elevators: how many: _____	<input type="checkbox"/> Gate System	
<input type="checkbox"/> Cabana / Clubhouse	<input type="checkbox"/> Pool	
<input type="checkbox"/> Parking Garage	<input type="checkbox"/> Spa	
<input type="checkbox"/> Other:	<input type="checkbox"/> Parks	
<input type="checkbox"/> Other:	<input type="checkbox"/> Sport Courts	
<input type="checkbox"/> Other:	<input type="checkbox"/> Other:	
<input type="checkbox"/> Other:	<input type="checkbox"/> Other:	

Complimentary Offerings

- Customer requested delivery date
- Board Meetings
- RCW reserve fund disclosures
- Presentations