

Regenesis

Reserve Study Component Checklist

INSTRUCTIONS: To receive a no obligation Reserve Study Proposal, fill in the appropriate blanks and boxes. Fax to 800.979.2313 or email to rich@regenesi.net Questions? Call 877.579.7779

Date: _____, 201__

HOA Legal Name _____ # of Homes Units: _____

Address: _____ # of Phases: _____
 _____ Year(s) Built: _____ to _____

Type of HOA: Condominium Condominium Conversion? Year Built: _____
 Homeowner Association or Planned Community

Building Style: Stacked Townhouse (side by side)
 Mid/High Rise (# of Floors: _____) # of Buildings: _____

President Developer _____ Ph: _____

Email Address: _____

Address: _____

Contact Person: _____ Title: _____

Email Address: _____ Ph: _____

Company: _____

Address: _____

Items Needed to Do Basic Research (FILL IN BLANK OR CHECK THOSE THAT ARE AVAILABLE)

Fiscal Year Starts: _____

Reserve Balance Effective at Beginning of Fiscal Year \$ _____ Current Interest Yield? _____%

Governing Documents (Declaration, Bylaws)

Site Plan

Blueprints (As Built)

Insurance Deductible on HOA's Insurance Policy; \$ _____

Reserve Study is needed by: _____, 201__

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CHECK ALL COMPONENTS MAINTAINED BY THE HOMEOWNER ASSOCIATION

- Barkdust (ONLY CHECK IF EVERY TWO YEARS OR MORE)
- Building Envelope System (CHECK ALL THAT APPLY)
 - Cementitious (like Hardiplank)
 - Cedar/Redwood
 - Vinyl
 - Plywood/T1-11
 - Brick Stone
 - Stucco
 - Other _____
- Carports
- Chimney Caps
- Clubhouse
 - Appliances
 - Bathroom(s)
 - Exercise Equipment
 - Flooring
 - Furnace/HVAC
 - Furniture
 - Hot Water Heater
 - Paint-Interior
 - Recreational Equipment (Pool Table, etc.)
 - Window Treatments (Drapes, Blinds, etc.)
- Concrete Sidewalks/Driveways
- Decks
- Elevator(s)
- Entry Access System
 - Building
 - Entry Gate
 - Parking Garage
- Equipment & Tool Inventory
- Fence/Wall
 - Brick Stone
 - Chain Link
 - Vinyl
 - Wood
 - Other: _____
- Fire Alarm System
- Fire Sprinkler System
- Fountain(s) How many? _____
- Gate-Main Entry How many? _____
- Gazebo
- Hallway(s)/Lobby-Common
- Hot Water Heat-Central
- Hot Water Heater(s)-Central
- HVAC-Common Areas (Hallway/Stairwells/Lobby)
- Landscaped Grounds
- Lights-Exterior
- Lights-Interior (Common)
- Mailboxes
- Office Equipment
- Paint-Exterior
- Paint-Interior (Common)
- Park
 - Play Structure(s) How many? _____
 - Furniture/BBQ Equipment
- Parking Garage Door(s) How many? _____
- Parking Garage Exhaust Equipment
- Path(s)
- Paving-Asphalt
- Pool
- Pond/Lake
- Roof
 - Composition Shingles
 - Cedar Shingles/Shakes
 - Cement Tile
 - Flat-Built up
 - Flat-Rubberized Membrane
 - Metal
 - Other _____
- Roof-Gutters & Downspouts
- Sauna(s) How many? _____
- Security Camera System
- Sign(s)
 - Main Entry
 - Directory
 - Street/Directional/Building
- Spa
- Storage-Personal Units
- Tennis Court(s)
- Trash Enclosures
- Trees
- Other _____
- Other _____
- Other _____
- Other _____
- Special Concerns? Attach details