**Take Over Checklist – HOA**

**Association Management Set-Up Information**

Account No. Association Name: Date:

Type: Condominium / Home / Planned Urban Development (PUD)

Web Site:

Manager Assigned:

No. of Div. # lots/units: # of buildings

Management fee per lot/unit: $ Monthly Rate: $

First month prorated? Yes/No If yes how much: $

Tax Id #

Bank account to open: [ ] Checking [ ] Savings [ ] CD

[ ] Other:

Checking # Maintenance Reserve:

Insurance Reserve: Other:

**Board of Directors:**

President: HM: WK:

Mailing Address: Cell:

E-mail Address: Term Expires:

Vice President: HM: WK:

Mailing Address: Cell:

E-mail Address: Term Expires:

Secretary: HM: WK:

Mailing Address: Cell:

E-mail Address: Term Expires:

Treasurer: HM: WK:

Mailing Address: Cell:

E-mail Address: Term Expires:

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