

PROPERTY TRANSITION TIMELINE

ACCOUNTING  45 HRS

MANAGEMENT  75 HRS

MAINTENANCE & JANITORIAL  13 HRS

IT  4 HRS

CONTRACT SIGNING TO START



ENTER HOMEOWNER RECURRING CHARGES
OPEN BANK ACCOUNTS AND CREATE CODES
AUDIT OWNER LIST

HOMEOWNERS LIST TO ONLINE PAYMENT OPTIONS

AUDIT LATEST FINANCIAL STATEMENT FROM PRIOR MANAGEMENT COMPANY

ENTER AND ORGANIZE VENDOR LIST

WRITTEN NOTIFICATION TO VENDORS OF NEW MANAGEMENT

UPDATE UTILITIES MAILING ADDRESS



CONTRACT SIGNING

REVIEW PREVIOUS MAINTENANCE & JANITORIAL CONTRACTS

LOCKBOX LOCATIONS AND CODES

DELIVER SIGNED CONTRACTS TO CEO

SITE WALK OVERVIEW WITH MANAGER

REQUEST DOCUMENTS 

REVIEW AND VERIFY ALL LEGAL, CORPORATE, AND GOVERNING DOCUMENTS

ADD COMMUNITY CHARGES

SCHEDULE MEETINGS AND INSPECTIONS

CONDUCT SITE REVIEW AND PERFORM SITE WALK WITH MAINTENANCE

BOARD MEMBER INFO TO CINC

DEVELOP A COMMUNITY CALENDAR

REVIEW PAST MINUTES AND MANAGEMENT REPORTS

OBTAIN PROPERTY INFO FOR WEBSITE 

INPUT COMMUNITY/PROPERTY INFO TO WEBSITE TEMPLATE

WEBSITE LAUNCH DATE TO CALENDAR

CONFIRM WEBSITE AVAILABILITY

15 - 60 DAYS



AUDIT CURRENT FINANCIAL STATEMENT

REVIEW AND SET UP BUDGET, FINANCIAL REVIEW AND COLLECTION POLICY

MAIL INITIAL DUES STATEMENTS AND INTRODUCTORY LETTER TO HOMEOWNERS

ENTER COLLECTION POLICY IN CINC

ORDER PAYMENT COUPONS

SITE WALK WITH MANAGER TO IDENTIFY ACTION ITEMS



ESTABLISH LOCKBOX LOCATIONS AND CODES

CREATE MECHANICAL EQUIPMENT LIST



REVIEW MOST RECENT TAX RETURNS

OBTAIN AND ORGANIZE ANY WARRANTY DOCUMENTS 

NOTIFY RESIDENTS OF WEBSITE AVAILABILITY

ORGANIZE FREE VENDOR INSPECTIONS AND EVALUATION OF THE COMMUNITY

VIOLATION INSPECTION WITH BOARD

REVIEW RESERVE STUDY AND REVIEW WITH BOARD

ELECTRONIC RECORDS CONVERSION

DOCUMENT UPLOAD TO WEBSITE

CONFIRM STATUS OF BOARDING FILE/PAYMENT SERVICES AGREEMENT

WEBSITE LAUNCH 

DRAFT NEW POLICIES FOR BOARD REVIEW

SCHEDULE ARBORIST SURVEY 

TOTAL HOURS 137