

Corporate Office:
P.O. Box 8637
Calabasas, CA 91372
www.ReserveStudy.com
(v) 800/733-1365
(F) 800/733-1581



Authorization and Information Form #:

General Information

Association Name: _____
(As you would like it to appear in the Report)

Association Reserves is authorized to prepare the following type of Reserve Study: (circle one) Full Update-With-Site-Visit Update-No-Site-Visit

The total fee for this service is \$ _____ for a turnaround of _____ weeks from the date a 50% deposit and all required information is received at the Association Reserves Corporate office.

The client representative to contact with respect to the site inspection, financial information, or historical Reserve projects is _____, and their daytime telephone number is (____) _____ - _____
Email address: _____

The total # of units is: _____.

The association's Fiscal Year begins on (example: Jan 1): _____.

While the Reserve Study will cover a 30-year time period, this Reserve Study will start with the (example: 2008) _____ Fiscal Year.

Would you like login credentials to access the Report and MS-Excel Funding Analysis from our website? Yes No

Special Instructions: _____

We, the undersigned, understand that the Association Reserves, Inc. Reserve Study addresses the normal deterioration of properly built and installed components with predictable life expectancies. The Reserve Study does not typically include the repair or replacement of plumbing, electrical wiring, or telephone lines. Any inspection will not address or evaluate repairs or replacements arising from original construction defects, environmental hazards (asbestos, radon, lead, etc.), or unpredictable acts of nature. We further understand that the Reserve Study fee is based on the accuracy of how the association was described to Association Reserves, Inc. If this is not found to be a true representation of the client's common area maintenance responsibilities, Association Reserves Inc. reserves the right to negotiate an adjusted fee.

Print Name: _____ Title: _____

Signature: _____ Date: _____

Financial Information

Monthly budgeted **total** owner assessment income: \$ _____

Monthly budgeted **Reserve contribution portion** of above: \$ _____

Most recent Reserve Balance: Date: ____/____/____, \$ _____

Please list expected changes to the Reserve Account **between the above date and the end of the current fiscal year:**

Anticipated Reserve Income

Date/Type: _____ \$ _____
 _____ \$ _____
 _____ \$ _____

Anticipated Reserve Expenses

Date/Type: _____ \$ _____
 _____ \$ _____
 _____ \$ _____

Does Interest earned on Reserve Funds remain in the Reserve Fund? Yes No
 If Yes, what is the average interest rate after taxes? _____%

Reserve Project History (recent, planned, or since last Reserve Study)

None recently completed None planned

Date/Description	Cost
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

Major Association Vendors (roofing, paint, asphalt, elevator, pool, etc.)

Please see attached list None of significance to this Study

Name/Trade	Phone
_____ () _____ - _____	
_____ () _____ - _____	
_____ () _____ - _____	
_____ () _____ - _____	

Current Common Area Concerns (not patently obvious)

Please list and describe such items as plumbing, termites, re-keying, etc.

