



# CALIFORNIA RESERVES

## RESERVE PROJECT INFORMATION SHEET

In order to keep your association's Reserve Study Report up to date and accurate, we heavily rely on information provided by the property manager and/or board of directors. If you have questions regarding what information to provide, please contact us at [contact@californiareerves.com](mailto:contact@californiareerves.com)

**ASSOCIATION NAME:** \_\_\_\_\_

### FINANCIAL INFORMATION

#### **SPECIAL ASSESSMENTS - Provide details for any current or anticipated special assessments**

Purpose: \_\_\_\_\_

Total Amount: \_\_\_\_\_

Amount per Ownership Interest: \_\_\_\_\_

*If the amount per ownership interest is variable or partially financed please email the details*

#### **LOANS / CONSTRUCTION DEFECT / OTHER**

Provide details for any loans, reserve paybacks, rebates, or other financial adjustments that should be included in the reserve study

Details

### ONSITE INSPECTION (Level 1 & 2 Only)

**ACCESS INFO:** Let us know if access is restricted to any of the components (e.g. entry gate, pool equipment room, utility closet, roof access, clubhouse, etc). If yes, please let us know how to obtain access (onsite lockbox, gate code, keys, onsite contact, etc)

Details

**SITE CONTACT:** Let us know if anyone will need to meet with our inspector onsite. This is not required but can be helpful to assist in understanding the association's history and goals. Typically our inspector will meet with the site contact at the beginning of the inspection for 10-25 minutes to discuss and walk the association and then will continue with the remainder of the inspection.

Name: \_\_\_\_\_

Email: \_\_\_\_\_

Cell: \_\_\_\_\_

**SPECIAL CONCERNS:** Are there any areas of the property (or previous Reserve Study Report) that we should recount/measure or pay special attention to?

Details



## RESERVE PROJECT INFORMATION

List all reserve projects that have been completed or are planned. Please include any available cost data or simply email us the approved contract. We will also need to know any additional project details such as: project phasing, share percentage (if the HOA isn't paying the full amount), change orders, etc.

You can detail larger projects below or skip to the end to make bulk adjustments to specific components

### Project Details

	Date	Cost
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