

## Vendor Name

123 Your Street  
Your City, ST 12345  
(123) 456-7890

## Experience and Background:

Years in Business:

Number of HOAs Currently Managed:

Experience with Similar Communities (Size/Type):

## Services Provided:

Financial Management:

- Budgeting
- Accounting and Reporting
- Delinquency Management

Administrative Services:

- Meeting Management
- Record Keeping
- Correspondence Handling

Property Maintenance:

- Routine Maintenance
- Emergency Repairs
- Vendor Management

Legal Compliance:

- Understanding of Local Laws
- Litigation Support
- Policy Enforcement

Technology and Communication:

- Digital Communication Channels
- Owner/Resident Portal
- Online Payment Options

Community Engagement:

- Event Planning
- Resident Surveys
- Community Newsletters

References and Reputation:

- References from Current/Past Clients:
- Online Reviews and Ratings:
- Complaints and Resolutions:

Financial Health and Transparency:

- Fee Structure and Transparency:
- Additional or Hidden Costs:
- Audit and Financial Review Policies:

Contract and Agreement:

- Contract Terms and Duration:
- Termination Clauses and Fees:
- Scope of Services Included:

Customer Service and Responsiveness:

- Average Response Time:

Availability for Meetings and Consultations:

Emergency Response Policies:

Insurance and Liability:

Liability Insurance Coverage:

Worker's Compensation Insurance:

Fidelity Bond Coverage (if handling funds):

Additional Notes and Observations: