

# Request for Proposal

## Reserve study

Thank you for the opportunity to work with your Association!

Please complete this form and return it to our office. Be as detailed as possible. The more information you can provide, the more accurate our proposal will be. If using the Adobe form fill feature, save to your computer first, fill it out, then attach to email and send to us. Thank you!

Offices nationwide

Reserve studies since 1982

**Rocky Mountain Office**

**(970) 946-2352 cell**

**(970)628-3003**

**Robbie Pepper CMCA, CCIM, GRI**

**robbie@fareserves.com**

1	Date proposal needed	<input type="text"/>
	Site Inspection Required	(yes or no) <input type="text"/>
	Date reserve study needed	<input type="text"/>
	How did you hear about us?	<input type="text"/>
	Special comments / issues / concerns about reserve study	<input type="text"/>

2	<b>Contact Information</b>			
	<b>Association Name</b>		<input type="text"/>	Phone <input type="text"/>
	Contact Name:		<input type="text"/>	FAX <input type="text"/>
	Association Site Address		<input type="text"/>	Email <input type="text"/>
	City	<input type="text"/>	State <input type="text"/>	Zip <input type="text"/>
	<b>Management Company Name</b>		<input type="text"/>	Phone <input type="text"/>
	Mailing Address		<input type="text"/>	FAX <input type="text"/>
	City	<input type="text"/>	State <input type="text"/>	Zip <input type="text"/>
	Email		<input type="text"/>	<input type="text"/>
	Web		<input type="text"/>	<input type="text"/>

3	<b>Property / Association Description</b>		
	<input type="text"/> # of Lots / Units	Type: <input type="checkbox"/> Condominium/Co-op	<input type="checkbox"/> Association maintains building exteriors?
	<input type="text"/> Year built (approximately)	<input type="checkbox"/> Townhomes	<input type="text"/> # of buildings
	<input type="text"/> Fiscal year begins	<input type="checkbox"/> Planned Development	<input type="text"/> # of stories
	<input type="text"/> Date of last reserve study	<input type="checkbox"/> Commercial	

4	<b>Description of Major Amenities</b>		Use additional page if necessary
	Description	Quantity	Comments
	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>

Beginning Balance as of January 1st next year: \_\_\_\_\_

Total dollar contribution from the Association into a separate Reserve Fund account (not operating account), either monthly or annually:

Monthly \$ \_\_\_\_\_ or Annually \$ \_\_\_\_\_

- Offices**
- Arizona
  - California
  - Colorado
  - Florida
  - Hawaii
  - Massachusetts
  - Nevada
  - New York
  - New Mexico
  - Northwest
  - Texas
  - Utah

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

**Property Detail WHAT'S INCLUDED?**

Buildings		Quantity	Square Feet	Plans Available?	Comments
<input type="checkbox"/>	Condominium				
<input type="checkbox"/>	Clubhouse				
<input type="checkbox"/>	Parking Garage				
<input type="checkbox"/>	Guardhouse				
<input type="checkbox"/>	Maintenance Building				
<input type="checkbox"/>	Pool/Spa Equip Building				
<input type="checkbox"/>	Pool House				
<input type="checkbox"/>	Pro Shops				
<input type="checkbox"/>	Gazebo/Pergola/Shelter				

Building Exterior	
<input type="checkbox"/>	Roofs
<input type="checkbox"/>	Gutters/Downspouts
<input type="checkbox"/>	Paint, Exterior
<input type="checkbox"/>	Decks/Balconies
<input type="checkbox"/>	Patio
<input type="checkbox"/>	Utility Doors
<input type="checkbox"/>	Heat, Air Conditioning
<input type="checkbox"/>	Lighting
<input type="checkbox"/>	Garage Doors
<input type="checkbox"/>	Car Ports
<input type="checkbox"/>	Underground Parking
<input type="checkbox"/>	Chimneys

Grounds	
<input type="checkbox"/>	Asphalt / Concrete Parking
<input type="checkbox"/>	Trash Enclosures
<input type="checkbox"/>	Fences-Walls-Gates
<input type="checkbox"/>	Security Cameras Lighting
<input type="checkbox"/>	Monuments/Signs
<input type="checkbox"/>	Mail Boxes
<input type="checkbox"/>	Landscape/Irrigation
<input type="checkbox"/>	Water Features
<input type="checkbox"/>	Pet Sanitation Stations
<input type="checkbox"/>	Sculptures
<input type="checkbox"/>	
<input type="checkbox"/>	

Building Interior	
<input type="checkbox"/>	Lobbies
<input type="checkbox"/>	Hallways
<input type="checkbox"/>	Stairwells
<input type="checkbox"/>	Elevators
<input type="checkbox"/>	Kitchen Appliances
<input type="checkbox"/>	Entry System
<input type="checkbox"/>	Cooling Towers
<input type="checkbox"/>	Chillers
<input type="checkbox"/>	Fitness Center
<input type="checkbox"/>	Boilers
<input type="checkbox"/>	Hot Water Heaters
<input type="checkbox"/>	Laundry Equipment
<input type="checkbox"/>	Fireplaces # ____

Site Amenities	
<input type="checkbox"/>	Swimming Pool
<input type="checkbox"/>	Sports Courts
<input type="checkbox"/>	Playgrounds
<input type="checkbox"/>	Docks/Boat Slips
<input type="checkbox"/>	Lakes/Ponds
<input type="checkbox"/>	Parks
<input type="checkbox"/>	Vehicles
<input type="checkbox"/>	Spa or Hot Tub
<input type="checkbox"/>	Sauna
<input type="checkbox"/>	Restrooms/Locker Rooms
<input type="checkbox"/>	Outdoor Shower
<input type="checkbox"/>	
<input type="checkbox"/>	

Timeshare Interior	Unit Type/Name	Quantity	# of Bedrooms	# of Baths	SF	Description

**Documents Available** **Anything else that might be helpful?**

Yes	No	
<input type="checkbox"/>	<input type="checkbox"/>	Annual Budget
<input type="checkbox"/>	<input type="checkbox"/>	Financial statements
<input type="checkbox"/>	<input type="checkbox"/>	CC&R's (maintenance responsibility section only)
<input type="checkbox"/>	<input type="checkbox"/>	Site Map
<input type="checkbox"/>	<input type="checkbox"/>	Building Plans
<input type="checkbox"/>	<input type="checkbox"/>	Existing Reserve Study
<input type="checkbox"/>	<input type="checkbox"/>	California Form DRE 623 (California associations only)