

New Client Information Sheet

Name of Association	
Number of Units	
Type	
Start Date	
Assessments	
Frequency	
HOA Tax ID #	
Late Fee Amount	
Late Fee Date	
Accrual or Cash Accounting?	
Cross Streets	
Community Address	
City, State, Zip	
Management Fee	
Setup Fee	
Initial Transfer Fee	
Disclosure Fee	
Transfer Fee	
Compliance Fee	
Statement Fee	
Lien Fee	
NSF Fee	
Additional Time Fee	
Special Assessment Collection Fee	
Transition Fee	
Developer Controlled?	
Developer	
Developer Unclosed Unit Payments?	
<i>Board Members</i>	
Name	
Title	
Address	
Phone	
E-mail	
Name	
Title	
Address	
Phone	
E-mail	
Name	
Title	
Address	
Phone	
E-mail	

New Client Information Sheet

Name	
Title	
Address	
Phone	
E-mail	
Name	
Title	
Address	
Phone	
E-mail	