

<u>Taylor Association:</u>	https://tamhoa.com/
Company/clients:	33 years in business; 100% family owned
Monthly Fee:	\$5,700/month
Agreement term:	1 year; 30 day cancellation
Initial Set Up Fee:	None; no fee for migration of data, no fee for special checks, no fee handling insurance claims, no website fee.
Resale Pkg fees:	\$185/165 & \$325 (new). @250 sales/year= \$168,750 retained by firm.
Relationship w/ Board:	“Communication and respect is the absolute key...is the best way to ensure there is a clear understanding of expectations and performance. Although Management may bring years of experience with them, we don’t want the Board to blindly follow. Board Members generally bring a wealth of knowledge, experience, and talent to the table. This should not be discounted or taken for granted. It should be harnessed! At the end of the day, we are all a team.” Identified need for annual meeting to develop “plans for the year” and staff to implement the plans a “team approach.”
Firm Uniqueness:	“Service-first company” and “do our jobs well but cannot take the place of caring people and effective communication.” “A modern, common-sense approach to community management.” Proposal offered hybrid approach using Taylor for “accounting, compliance functions,” and keeping costs reasonable as the Board works “toward the ultimate goal of self-managed.” They propose to guide SOA toward complete internal management (self-managed) if that is the BOD’s goal.
Communications:	Believe in “prompt and polite” phone calls and correspondence with community members. On-time financial reports to strengthen trust. As individuals they promote respect of one another, a balanced life, and responsiveness and accountability to BOD and community.
Affiliate Businesses:	None.
Staff identified for SOA:	Will work with Board for key position appointment and suggest Board ‘sits in on interviews’; open to interviewing current staff if mutually desired; need 2 to 3 months to establish team. Expect to provide CAM, Admin Assist, Vendor Coordinator, Site inspector, compliance and accounting and all other staffing as required.
Staffing costs:	100% of wages & benefits passed to SOA; no mark-up fee “employees are not a profit center.” \$100/mo per employee for payroll processing
Accounting system:	Village Management Systems with customizable solutions. Believe in a promote on-time monthly financials.
Reserve Studies:	3 rd party solicit bids; integrate with Budget process.
Project Mgmt:	“requires an attentive and responsive staff. Regular communication (sometimes daily) is a must. Additionally, periodic spot checks of the various maintenance elements and projects is essential, as is a final job walk on larger projects to determine the scope of work was followed and adhered to by the vendors.”
AGC & Enforcement:	Managed in-house with on-site staff. Note: 24/7/365 call center and availability.