

*What level(s) of Reserve Study do you need?

Level 1

Full Reserve Study with a site visit

Level 2

Update Study with a site visit

Level 3

Update Study without a site visit

Level 4

Preliminary, Community Not Yet Constructed

Developer/Transition Study

Scheduling Information

*Date:	*Date Proposal Needed:	*Date Study Needed:

Association Information

*Association Name:	Association's Insurance Carrier	*Unit Type (Condo, etc.):

*Manager Name:	*Management Company:	*Company Address:

*Contact Phone #:	Contact Fax #:	*Contact Email:

Name of Board Member:	Board Member Contact Info:	Date of Next Board Meeting:

*Year(s) Constructed:	*Number of Buildings:	*Number of Units:

*Association Address:

Number of Stories:	Name of Developer/Builder :

Common Building Components

Exterior Facade Type(s):	Are there balcony decks?	Are there patio decks?
Roof Type(s):	Mechanical Systems:	Interior Common Elements:

*Is the Association responsible for building exteriors?

YES NO COMMENT: _____

*Is the Association responsible for doors and windows?

YES NO COMMENT: _____

Does the building have elevators?

YES NO COMMENT: _____

Other Association building components (stairs, breezeways, Association-owned units, etc.):

Common Site Components

Are there paved parking and/or driving areas?

YES NO COMMENT: _____

Is there a parking garage?

YES NO COMMENT: _____

If yes, is it underground?

YES NO COMMENT: _____

Are there private unit garages or carports?

YES NO COMMENT: _____

Are there sidewalks?

YES NO COMMENT: _____

Are there fences?

YES NO COMMENT: _____

If yes, type(s): _____

Are there irrigated areas?

YES NO

If yes, # of Zones: _____ # of Clocks: _____

Additional questions or comments pertaining to common site components:

Common Area Components

Is there a swimming pool(s)?

YES NO COMMENT: _____

Is there a spa(s)?

YES NO COMMENT: _____

Are there any sports courts?

YES NO COMMENT: _____

Is there a clubhouse?

YES NO COMMENT: _____

Are there any other amenities not mentioned?

YES NO COMMENT: _____

If yes, type(s):

Additional questions or comments pertaining to common area components:



a Charles Taylor company

Other Information

*Are site and building drawings available for our use?

YES NO COMMENT: _____

*Is there an existing Reserve Study on file? If yes, please provide a copy to: Reserve@callsBSA.com

YES NO COMMENT: _____

Would you like us to meet to present the study at a board meeting?

YES NO COMMENT: _____

Would the Association like SBSA to prepare an Excel format Supplement Spreadsheet?

YES NO COMMENT: _____

Have there been any problems with site or building components? If yes, explain below.

YES NO COMMENT: _____

*Is the community involved in any litigation, including, but not limited to, construction defect litigation?

YES NO If yes, please explain below:

Contact name and number of service and/or maintenance providers:

Contact Name:	Company:	Contact #:

Contact Name:	Company:	Contact #:

Contact Name:	Company:	Contact #:

Contact Name:	Company:	Contact #:

SBSA

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Additional questions or comments:

Please send completed form to:

E-mail: Reserve@callSBSA.com
or Fax: 720.345.0250