



CLIENT CHECK LIST

So that we may begin preparing your reserve study,
please forward to us as much of the following information as possible:

- Original copy of the signed contract.
- Copy of the client's operational guidelines (i.e. CC&Rs) and/or other documents detailing the client's maintenance responsibilities.
- The most current monthly financial statements.
- DRE Budget (Department of Real Estate Reserve Worksheet and Detail Pages).
- Copies of past reserve studies.
- Names, addresses and phone numbers of the client's pertinent service contractors (i.e. pool, landscaping, etc.), as applicable.
- Map of client's property with phase development detail, if available.
- Access devices (i.e. pool gate, pump room, clubhouse keys, gate card and/or entry codes, etc.), as applicable.
- Any additional information, records or documents which may help us in the compilation of your reserve analysis study.

If you have any questions, please feel free to call us.

Mail all information to:

Reserve Data Analysis, California LLC
1500 Adams Avenue, Suite 313
Costa Mesa, CA 92626

Telephone: (866) 434-8396 (toll free) FAX: (866) 434-8401 (toll free)

E-mail: info@reservebudget.com



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