	Option #1	Option #2	Option #3	Option #4	Option #5	Option #6	Option #7	Chosen Option	Option #9	Option #10	Option #11
	First Service. Residential	Empire Management Group	HMI Management / (Hara) Associa	Beacon Community Management	Southwest	Real Manage	Real Manage	FOLIO Association Management	FOLIO Association Management	Great Communities/ Specialty Management	Great Communitie Specialty Management
ame:	Maitland	Kissimmee	Longwood	Windermere	Maitland	Winter Garden	Winter Garden	Orlando	Orlando	Altamonte Springs	Altamonte Spring
hen Company established:	1990	1993	1972	2010	2005	2002	2002	2010	2010	1983	1983
o. of Communities per manager	N/A	N/A	N/A	7	Unknown	8 to 10	8 to 10	20-24	20-24	Unknown	Unknown
argest Association Managed	26,000	1,000	388	718	1800	9465	9465	1034	1034	600	600
mallest Association Managed	23	25	6	15	22	32	32	4	4	12	12
faintneance Emergency Response	24/7 Call Center	30 min	30 min	24 hrs	24/7 call center	24 hrs	24 hrs	24/7 call center	24/7 call center	24/7 call center	24/7 call center
Other Requests	24/7 Call Center	48 hours	24-48 hrs	24 hrs	24-48 hrs	24-48 hrs	24-48 hrs	48 hrs	48 hrs	24/7 call center	24/7 call center
extended Hours	Online Available	Online Available	24/7 Call Center	24/ 7 email/phone	24/7 call center	24/7 call center	24/7 call center	48 hrs	48 hrs	24/7 call center	24/7 call center
Soard Education Courses	Included	Included	Included	Included	Included	Included	Included	Inlcuded	Inlcuded		
Onsite / Off-site CAM Assigned	Off-site	Off-Site	Off-Site	On-Site	On-Site	Off-Site	On-Site	On-Site	On-Site	On-Site	On-Site
Hours Assigned Weekly	20 hrs	1.000	14	20 hrs	20 hrs	2	24 hrs	15 hrs	20 hrs	15 hrs	20 hrs
nitial Contract Term	Min 18 mths 1 yr term @6% 1	1 year	14 years 1 year @3% 1	1 year	3 years 3 years	3 years 3 years @ 3.5% 1	3 years 3 years @ 3.5% 1	1 year	1 year	1 year No Auto Renewal	1 year No Auto Renewa
Renewal rate Portfolio Management	r yr teitii @6% [T]	1 year	i year @5% [T]	1 year	o years	3 years @ 3.5% [T]	3 years @ 3.5% [T	1 year	1 year	No Auto Renewal	No Auto Renewa
Portiotio Management Certified Managers	٧	Υ	V	Υ	V	V	Υ	Y	Y	V	V
One Mgr per Association	Ϋ́	N/A	Ÿ	Ÿ	Y	Ÿ	Y	Ÿ	Ÿ	l v	· Y
# of Properties assigned to Mgr	N/A	N/A	Multiple	Multiple	N/A	N/A	N/A	N/A	N/A	N/A	N/A
" or 1 reporting accigning to mg.	2 per week / up to 4		12 per yr , more				3 days per week/ 8 hrs				
Community Visits	hrs per visit	12 per yr	available	On-site	On-site	12 per yr	each day *	On-site	On-site	On-Site	On-Site
Web-based Management	Υ	Υ	Υ	Υ	Υ	Υ	Υ	Y	Υ	Υ	Υ
Services					Services						
Board/ Owner Portal	Included	Included	Included	Included	Included	Included	Included	Included	Included	Included	Included
Tenant Portal	Included	Email		Email / Phone	Email	Included	Included	Email	Email	Email	Email
Board Meetings (14 per year)	8 Meetings / yr	12 Meetings / yr	14 Meetings	14 Meetings	12 Meetings	14 Meetings	14 Meetings	14 Meetings	14 Meetings	14 Meetings	14 Meetings
Coordinate & Manage Vendors	Included	Included	Included	Included	Included	Included	Included	Included	Included	Included	Included
Manage Vendor Bid Process	Included	Included	Included	Included	Included	Included	Included	Included	Included	Included	Included
Oversee Capital Improvement Projects	Not Included	Add 10% of Proj cost	Add 2-3% of Proj cost	Add 10% to Proj cost	Additonal Charge	Add 10% to Proj cost	Add 10% to Proj cost	Add 7% to Proj cost	Add 7% to Proj cost	Unknown	Unknown
Architectural Applications Tracker	Included	Included		Add Cost	Included	Included	Included	Included	Included	Included	Included
Financials											
Budget Planning	Included	Included	Included	Included	Included	Included	Included	Included	Included	Included	Included
Reserve Account Management		Included	Included	Included	Included	Included	Included	Included	Included	Included	Included
Assessment Collections	Included	Included	Included	Included	Included	Included	Included	Included	Included	Included	Included
Vendor Payments	Included	Included	Included	Included	Included	Included	Included	Included	Included	Included	Included
Bank Reconciliations	Included	Included	Included	Included	Included	Included	Included	Included	Included	Included	Included
Monthly Budget Reporting	Included	Included	Included	Included	Included	Included Seacoast, Banc or	Included Seacoast, Banc of	Included	Included	Included	Included
Partner Bank used	Unknown	Unknown	Unknown	Bank United	Cogent Bank	California First	California First	National	National	Truist	Truist
Tech/Online Services											
Mobile App	Included	Included	Unknown	Unknown	Future Proj	Included	Included	Included	Included		
Virtual Meetings	Available	Available	Available	Unknown	Included	Included	Included	Available	Available	Included	Included
Online Voting	Available	Available	Unknown	Unknown	Unknown	Available	Available	Available	Available	Future Project	Future Project
Collection of Dues	Included	Included	Included	Included	Included	Included	Included	Included	Included	Included	Included
Bid Processing & Management	Included	Included	Included	Included	Included	Included	Included	Included	Included	Included	Included
Membership Communication	Included	Included	Included	Included	Included	Included	Included	Included	Included	Included	Included
Legal Support	41-41		075 0405#	005.1	04751					0501	0501
Litigation Support in Event of Lawsuit	\$150 hr	\$250 hr	\$75-\$125/hour	\$65 hr	\$175 hr	Unknown	Unknown	\$75-\$150 hr	\$75-\$150 hr	\$50 hr	\$50 hr
Email/ Portal Violation Submissions	Included	Included	Unknown	Included	Included	Included	Included	Included	Included	Included	Included
Mail Violations	\$8.50 per letter	\$5 per letter	\$5 per letter	at cost	\$2.5 per letter	Add fees	Add fees	\$3.5 per letter	\$3.5 per letter	\$0 !!!!	\$0
Enforcement of Collection Policies	Included	Included	Included	Included	Included	Included	Included	Included	Included	Included	Included
Storage of Association Records	Included	Included	Included	Included	Included	Included	Included	Included	Included	Included	Included
Handle Full Collection Services	Included	Included	Included	Included	Included	Included	Included	Included	Included	Included	Included
Transition Timeline		<u> </u>		00 400 days		00 D	00 0	00 00 days	00.00 days	20.00 days	20.00 4
No of days requested				60 -100 days		60 Days	60 Days	60-90 days	60-90 days	30-60 days	30-60 days
Cost Management Fee Onsite CAM Fee	\$72,432.00	\$48,000.00	\$61,257	\$66,840	\$106,148	\$21,000	\$21,000 \$54,000	\$41,280 \$35,963	\$41,280 \$47,950	\$63,984 \$33,540	\$61,920 \$44,720
Haalth Incomes Oneita Ctaff		\$5,100					,		•		
Health Insurance Onsite Staff									1		1
Additional Full Time Staff	Recc Admin Assistant	Maintenance									

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Distribution of FOBs Reconstruct financial info from prior mgmt	\$25 each	\$5 each (x688)		\$10 each \$500	Included	Annual Fee	Annual Fee	Included	Included	\$5 per / \$15 activate	\$5 per / \$15 activate
Onetime Database set up fee	\$688.00	\$1,720		, , ,	\$750	\$1,750	\$1,750	\$1,000 waived	\$1,000 waived	\$0	\$0
narge for CAM to attend/prep additional Meeting	\$250 hr/ \$50 hr	\$150 hr	\$75 hr	\$125 hr	\$150 hr	\$1,700	\$1,750	\$75 per hr	\$75 per hr	**	**
Collection notices	\$60 per letter	,	, -	\$45 per letter	\$20 per letter	\$25 per letter	\$25 per letter	,			
Late Fee notices	\$11 per letter	\$10/ ea	\$20 per letter	\$75	\$14 per letter	\$5 per letter	\$5 per letter	\$10 per letter	\$10 per letter		
Intent to Lien	\$150 per letter	\$100/ea	\$150	\$45		,	,	\$75	\$75		
Attorney referral letters	\$250 per letter	\$200/ ea	\$75	\$105 per letter	\$175 per referral	\$225 per referral	\$225 per referral	150 per referral	150 per referral		
ARC Tracker Yearly Fee	7-00 par 1-111	7 -7-77	***	, par	\$1,634	, , , , , , , , , , , , , , , , , , ,	, , , , , , , , , , , , , , , , , , ,				
Office Supply fee	\$250.00		\$860		*-,						
Other Yearly Fees	\$850.00	\$1,200	\$516								
	Cost to add Admin	salary +32% burden	Fees schedules	Truist for payment	on gates	visits	week onsite CAM is	Truist for payment	Truist for payment	transparent pricing	transparent pricing
	attend other 4 HOA	visits	14 year inital term		calculated by shared	using banking partner	using banking partner	questions	questions	office/mail supplies	supplies is less than
	/week		dcost Salary, taxes,		Metrowest have	0 0.	0 0.	,	l'	•	''
	letter high		•		charging for many						
	Ü				,						
Additional Fees											
	\$1.27/mo/unit										
	\$75 or \$150 per hour;		\$75/hr								
	\$750/yr + \$250 copies									1	
	\$7.50/unit										
	\$8.50 each	\$5/ea or \$14/ea cert									
Check handling fee	check/emergency										
	\$7.50/ea + costs	\$14/ea + costs									
CDs at external accounts	renewal										
Admin fee for external finance accounts	\$25/account/month										
Admin Support services	\$75/hr										
CAM support staff	\$150/hr										
Preparation of meeting minutes	\$100/ea										
30 day collection notices	\$60/ea										
Bulk Mail fee for 344 units		\$350 per mailing				ea		cost	cost		
Process Annual report		\$25									
Box destruction		\$15/box									
Payment plan monitoring		\$100 or \$200						\$5/mo/unit	\$5/mo/unit		
Notice of Late Assess (FL requirement)		\$25/per letter	\$20 or \$35		\$20/ltr + postage			\$10/letter	\$10/letter		
Admin/Legal research		\$75 or \$150 per hour		\$65/hr							
Assn Exit fee		\$250 or \$275	\$300		\$500						
General copies, postage, labels, envelopes	++++	++++	fee	++++	++++	++++	++++	++++	++++	++++	++++
Electronic storag			\$16.99/mo								
Scans			\$0.5 per scan?								
NSF fee			\$25								
Acting as agent of record?			\$50								
Additional Prop Inspections			\$150/full - \$75 light								
Payroll process of onsite personnel			Direct cost + 10%								
Lein filing				105/ plus legal costs							
Satisfaction of lein				\$35		ļ	ļ				
Prepare notice of commencement				\$75							
pulling inactive records from storage				\$25/hr	ļ	ļ	ļ				ļ
Check printing in-house vs epay					\$25/chk/ \$75 for 1 day						
Auditor/ Financial Application assist					\$95/hr						
Bank reconcile for non partner banks					\$25 per acct/mo	ļ	ļ				ļ
Annual Corp filing					\$25	ļ	ļ				
Custom financial report					\$125 per report						
Invoice processing fee					\$1.75 per invoice	ļ	ļ				ļ
Mass email newsletters						or \$30 for each	or \$30 for each				
Record storage					ļ	ļ	ļ	\$50/mo	\$50/mo		
Welcom letter with coupons					ļ	ļ	ļ	7.50 plus cost	7.50 plus cost		ļ
Annual assessment billing					ļ	ļ	ļ	\$5.25/unit	\$5.25/unit		
Manual payment processing								\$3.50 each	\$3.50 each		
Accounts payable check					ļ	ļ	ļ	\$3.50 per check	\$3.50 per check		
1099 prep					ļ	ļ	ļ	\$10 per vendor	\$10 per vendor	\$3.00	
Extra pay coupon letter		1		1	1	1	I			\$0.25	\$0.25