ONE PHONE CALL

Upon notification from Title Company of a pending sale

1. Get and fill out Transfer of Property Form
2. Notify Architectural Committee of inspection
3. Committee member comes to office and gets paperwork
4. After inspection he/she returns to office ask to see file
5. Reviews file then finishes filling out transfer form
6. Returns file to staff
7. If violations are found realtor is notified by fax or phone call
8. Fill out paperwork from title company
9. Check to see if account is on Surepay, if on Surepay attach blank cancellation form to file
10. Check if there is a special assessment still to be paid
11. Check general account standing
12. Check to see if any pool cards are out standing
13. Gather materials to be mailed in envelope
    - Welcome packet
    - Copy of Budget
    - Copy of Financial Statement
    - Copy of CC&R's, By-laws, Architectural Rules
    - Make copy of statement
    - Type address label for envelope
    - Fill out certified mail address card
    - Fill out certified mail return receipt
14. Place all items in envelope
15. Place envelope in bin for postman to pick up
16. Make copy of paperwork from title company
17. Staple Transfer of Property and Statement together
18. File in pending sales file
19. When postman brings bill for mailing paperwork, fill out petty cash form
20. Place money in envelope and attach bill & petty cash form
21. After certified receipt is returned by postman, attach to file
22. After postman signs petty cash form file

Before property closes escrow Title Company will call for update on file

23. Re-check general account standing
24. Re-check special, if applicable
25. Re-check to see if pool cards have been returned, if applicable
26. Update the info in file

After property closes escrow Title Company will send copy of deed, age verification, CC&R Agreement and monies due

27. Post monies to account
28. File CC&R Agreement
29. File Age Verification
30. Pull Statement from file
31. Pull owner's file
32. Full Kardex file cards
33. Pull Rolodex card
34. Get new file folder
35. Get Lot Change Form
36. Get new cards for Kardex file
37. Get new card for Rolodex
38. Type new label for file folder
39. Type new cards for Kardex file
40. Type new card for Rolodex
41. Stamp Rolodex card with pool card stamp
42. Fill out Lot Change Form
43. Change name and address in Rapidfile
44. Change name in Quickbooks
45. Type name, address and lot number on new owner sheet
46. Put name in directory file
47. File out cancellation form, if applicable
48. File out Surepay cancellation worksheet, if applicable
49. Remove Surepay from Quickbooks
50. Remove Surepay from ACH file
51. Put directory change form (if brought in by owner) in directory file

Additional time required making copies of all forms