



ADVANCED RESERVE SOLUTIONS

NEW CLIENT PUNCH LIST

Please forward to us as much of the following information as possible:

- Signed proposal letter (if not signed/accepted digitally).
- Governing documents and/OR other documents detailing client's maintenance responsibilities
- Fiscal year end date _____
- Reserve fund balance anticipated at end of fiscal year _____
- Current reserve contribution _____ (annual or month)
- Interest rate % earned on reserve fund (approximate average %) _____
- Most recent past reserve study, if available
- Architectural building plans, if available
- Map of community with phase development detail, if available
- Maintenance and Service Vendors, as applicable:
 - Name, City/State, Phone Number, Contact Person (if applicable)
 - Types of Vendors:
 - HVAC
 - Elevator
 - Pool Service
 - Septic/Sewer
 - Well/Water
 - Fire Alarm Service
 - Any other vendors for unique or problematic components.

Advanced Reserve Solutions of New England

Paul Huijing, P.E. & Associates

Massachusetts Office - 53 Woodlot rd. Amherst, MA 01002 - 508-377-1011

Connecticut Office - 49 Randolph rd. Middletown, CT 06457 - 860-955-1400

www.arsinc.com/newengland/ • jcoggins@arsinc.com