

Property Name \_\_\_\_\_ Date \_\_\_\_\_  
 Property Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
 Management Company or Owner \_\_\_\_\_  
 Company Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
 Manager Name \_\_\_\_\_ Email \_\_\_\_\_  
 Manager's Telephone \_\_\_\_\_ Ext \_\_\_\_\_ Mobile \_\_\_\_\_ Fax \_\_\_\_\_  
 On-Site Contact \_\_\_\_\_ Tel \_\_\_\_\_

**STUDY TYPE REQUESTED**

- Level I Reserve Study (New Capital Reserve Study with on-site observation)
- Level II Update Reserve Study (Update Reserve Study with on-site observation)
- Level III Annual Reserve Study Update (Update with NO on-site observation)
- Transition Warranty Inspection for New Communities

**PERTINENT EXISTING DATA (The availability of building and site plans is important in allowing us to provide your community with the best price!)**

**Plans Available?** No Yes **Type of Plans?** Building Site to scale Site not to scale  
**Previous Reserve Study?** No Yes Year

**TYPE of COMMUNITY or FACILITY**

- |                                |                          |                              |                         |
|--------------------------------|--------------------------|------------------------------|-------------------------|
| Homeowner's Association        | Townhouse Association    | Master/Large Scale Community | Residential Condominium |
| Mixed Use Condominium          | Commercial Condominium   | Cooperative                  | Office Park             |
| Religious / Educational        | Recreational Association | Golf Course / Country Club   | Yacht Club / Marina     |
| Active Adult / Assisted Living | Resort / Timeshare       | Township                     | Other                   |

**COMMON SITE FEATURES or AMENITIES (Indicate if item is to be included in Reserve Study)**

- |                       |                       |                     |                       |                               |
|-----------------------|-----------------------|---------------------|-----------------------|-------------------------------|
| Entry Monument        | Fencing               | Detention Basin     | Exterior Main Pool    | Observation Deck              |
| Entry Gate            | Railing               | Earthen Dam         | Exterior Wading Pool  | Marina                        |
| Signage               | Site Lighting         | Concrete Dam        | Exterior Spa/Hot Tub  | Boat Docks # of slips         |
| All Roads             | Garden Walls          | Pond#               | Lazy River            | Marine Power & Water Pedestal |
| Entry Roadways        | Retaining Walls       |                     | Water Slide           | Boat Ramp                     |
| Some Roadways         | Trash Corrals         | Lake#               | Interior Pool         | Boat House                    |
| Parking Areas         | Mailboxes             |                     | Interior Sap/Hot Tub  | Boat Lifts                    |
| Townhouse Rds. & Prk. | Mailbox Clusters      | Aerators            | Tot Lot #             | Boat/RV Lot                   |
| Alleyways             | Mail Pavilion         | Fountains           | Exercise Stations     | Beach Areas                   |
| Driveways             | Waterlines            | Bulkhead            | Tennis Court          | Golf Course # Holes           |
| Driveway Aprons       | Sanitary Lines        | Shoreline Revetment | Pickle Ball           | Driving Range                 |
| Bridges#              | Irrigation            | Gatehouse           | Multi-Purpose Court   | Putting Green                 |
| Culverts#             | Well                  | Gazebo              | Sport Fields          | Practice Facility             |
| Sidewalks             | Pump Station          | Pavilion            | Picnic Areas          | Pro Shop                      |
| Curbs & Gutters       | Septic Station        | Pergola             | Community Park        | Golf Maintenance Facility     |
| Guardrails            | Lift Stations         | Shed                | Campgrounds           | Golf Course Equipment         |
| Paths                 | Water Treatment Plant | Garage              | Dog Station           | Owned Leased Mixed            |
| Boardwalks            | Gas Lines             | Carport             | Dog Park              | Miniature Golf                |
| Footbridges#          | Sub-grade HVAC Line   | Bus Stop            | Stables               | Cart Barn                     |
| Beach Access          | Storm Water Mgmt      | Mailbox Pavilion    | Basketball Court      | Cart Path                     |
| Plaza                 | Rain Garden           | Vehicles            | Fishing/Crabbing Deck | Cart Bridge                   |

**COMMON USE BUILDINGS (Indicate if item is to be included in Reserve Study)**

- |                         |                   |                       |                     |                    |
|-------------------------|-------------------|-----------------------|---------------------|--------------------|
| Clubhouse               | Bath House        | Retail Building       | Banquet Hall        | Clock Tower        |
| Pool House              | Cabana            | Warehouse             | School Building     | Lighthouse         |
| Parking Garage          | Storage Buildings | Pump House            | Dormitory           | Municipal Building |
| Maintenance Building    | Equestrian Center | Lift Station          | Gymnasium Building  | Police Station     |
| Administration Building | Stable            | Water Treatment Plant | Auditorium Building | Fire Station       |
| Community Center        | Barn              | Religious Building    | Stadium             | Library            |
| Lodge                   | Greenhouse        | Rectory               | Boat House          |                    |
| Fitness Center          | Post Office       | Convent               | Golf Pro Shop       |                    |
| Recreational Center     | Office Building   | Fellowship Hall       | Tennis Pro Shop     |                    |

**BUILDING TYPE:**

<i>Single-Family</i>	<i>Townhouse Buildings</i>	<i>Garden Style Buildings</i>	<i>Midrise Buildings</i>	<i>Highrise Buildings</i>
<i>Duplex Buildings</i>	<i>Triplex Buildings</i>	<i>Quadruplex Buildings</i>	<i>Piggyback Townhouse</i>	<i>Row-House Buildings</i>
<i>Patio Homes</i>	<i>Cluster Homes</i>	<i>Carriage Homes</i>	<i>Villas</i>	<i>Timeshare Buildings</i>

**BUILDING Data:** (If more than one building type, please list the type in spaces provided.)

<b>Number of Buildings:</b>	<b>Number of Stories:</b>	<b>Number of Units:</b>
<b>Number of Buildings:</b>	<b>Number of Stories:</b>	<b>Number of Units:</b>
<b>Number of Buildings:</b>	<b>Number of Stories:</b>	<b>Number of Units:</b>

**Year Construction Started:**                      **Year Construction Done:**                      **If Conversion, Yr. Converted:**

**Are The Buildings Identical?**      *Yes*      *No*

**BUILDING TYPE Reserve Study Items: Site, Exterior, Interior, and Systems** (Indicate if item is to be included in Reserve Study)

**Building Site Items**

<i>Driveway Aprons</i>	<i>Lead-walks</i>	<i>Building Lights</i>	<i>Privacy Fencing</i>	<i>Driveways</i>
------------------------	-------------------	------------------------	------------------------	------------------

**Building Exterior Items**

<i>Roofing</i>	<i>Siding and Trim</i>	<i>Garage Doors</i>	<i>Unit Doors</i>	<i>Unit Windows</i>
<i>Porches</i>	<i>Decks</i>	<i>Patios</i>	<i>Exterior Painting</i>	<i>Common Doors</i>
<i>Fire Escapes</i>	<i>Common Windows</i>	<i>Awnings</i>	<i>Balconies</i>	<i>Exterior Stairs</i>
<i>Exterior Hallways</i>	<i>Terraces</i>	<i>Storefronts</i>	<i>Stained Glass</i>	<i>Spire</i>
<i>Skylights</i>				

**Building Interior Items**

<i>Laundry</i>	<i>Restrooms</i>	<i>Unit Interiors</i>	<i>Corridors</i>	<i>Exercise Room</i>
<i>Exercise</i>	<i>Office</i>	<i>Stairwells</i>	<i>Retail Space</i>	<i>Lobbies</i>
<i>Equipment</i>	<i>Community Room</i>	<i>Storage Rooms</i>	<i>Cafe'</i>	<i>Restaurant</i>
<i>Kitchen</i>	<i>Locker Rooms</i>	<i>Guest Unit</i>	<i>Dining Room</i>	<i>Studio Unit</i>
<i>Meeting Room One</i>	<i>Two Bedroom Unit</i>	<i>Three Bedroom Unit</i>	<i>Four Bedroom Unit</i>	
<i>Bedroom Unit</i>				

**Building System**

<i>Unit HVAC Systems</i>	<i>All Building Piping</i>	<i>Unit Hot Water Heaters</i>	<i>Building Electrical Sys.</i>	<i>Electrical Meters Telephone</i>
<i>Entry System</i>	<i>Security System</i>	<i>Fire Alarm</i>	<i>Fire Sprinkler System</i>	<i>System</i>
<i>Network System</i>	<i>Boiler</i>	<i>Common Building</i>	<i>Solar System</i>	<i>Elevator</i>
<i>Cooling Tower</i>	<i>Split HVAC Systems</i>	<i>Piping Central Hot</i>	<i>Hot Water Heaters</i>	<i>Common Area Electrical Sys.</i>
<i>Trash Compactor</i>	<i>Sump Pumps</i>	<i>Water Sys. Generator</i>	<i>Pressurization System</i>	<i>Exhaust System</i>
<i>Water Boost System</i>	<i>Transformers</i>	<i>Vehicles</i>	<i>Central Heating &amp; Cooling Plant</i>	