

**GOLDSMITH COMPANY**  
**P.O. Box 1827**  
**Greenville, SC 29602 FAX: 297-6207**  
**Preliminary Bidding Questionnaire**

Please provide answers to the following questions. This will assist us in developing a more definitive management proposal.

Association Legal Name: \_\_\_\_\_

Cross Streets: \_\_\_\_\_

Contact Person: \_\_\_\_\_ Position: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip \_\_\_\_\_

Phone Contact number \_\_\_\_\_ E-Mail \_\_\_\_\_

1. Total Units: \_\_\_\_\_ Type of Units: \_\_\_\_\_ Year(s) built: \_\_\_\_\_

2. Assessments/Dues: HOA Fee \$ \_\_\_\_\_ Special Assessment \$ \_\_\_\_\_

3. Number of Board members: \_\_\_\_\_ Number of Committees: \_\_\_\_\_ Average Committee Size: \_\_\_\_\_

4. Board meetings held: \_\_\_monthly \_\_\_every other month \_\_\_quarterly \_\_\_Other: \_\_\_\_\_

Location: \_\_\_\_\_ Time: From \_\_\_\_\_ to \_\_\_\_\_

5. The Annual Meeting is held during (Month) : \_\_\_\_\_

Location: \_\_\_\_\_ Time : \_\_\_\_\_ Estimated Attendance: \_\_\_\_\_

6. What major projects are scheduled in the next three years? i.e. painting, resurfacing, pools, playgrounds

Other \_\_\_\_\_

7. Do you have employees? \_\_\_No \_\_\_Yes If yes, how many \_\_\_\_\_ Position: \_\_\_\_\_

8. How would you rate the physical condition of the property?

Buildings: \_\_\_\_\_ Grounds: \_\_\_\_\_

9. Has a Reserve Study been completed? \_\_\_No \_\_\_Yes When last updated \_\_\_\_\_ By whom \_\_\_\_\_

10. Are your Reserve Accounts being adequately funded? \_\_\_No \_\_\_Yes

11. Who did last year's audit and tax return? \_\_\_\_\_

12. Vendors: Attorney \_\_\_\_\_ Landscape \_\_\_\_\_  
Insurance \_\_\_\_\_ Are there any outstanding claims \_\_\_No \_\_\_Yes  
If yes, please provide an overview of claim: \_\_\_\_\_
13. Other than routine collection work is your Association involved in any litigation? \_\_\_No \_\_\_Yes  
If yes, please provide an overview of the nature of the dispute: \_\_\_\_\_
14. Do the properties have reoccurring problems such as breaking water lines, rotten wood, peeling paint, or leaky roofs, etc.:  
\_\_\_No \_\_\_Yes: Explain: \_\_\_\_\_
15. Please describe the problems that need immediate attention: \_\_\_\_\_  
\_\_\_\_\_
16. What are your reasons for bidding management: \_\_\_\_\_  
\_\_\_\_\_
17. Rental factor in your Association: \_\_\_\_\_% (estimate)
18. Explain rule violation problems in your Association and enforcement  
procedure \_\_\_\_\_:  
\_\_\_\_\_
19. Do you publish a newsletter? \_\_\_No \_\_\_Yes How Frequently? \_\_\_\_\_
20. Who writes, publishes and distributes the newsletter? \_\_\_\_\_
21. Describe your amenities (i.e. pools, tennis courts, etc.) \_\_\_\_\_  
\_\_\_\_\_
22. Additional comments: \_\_\_\_\_  
\_\_\_\_\_
23. How did you learn of Goldsmith Company? \_\_\_\_\_
24. Referred by: \_\_\_\_\_

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Position with Association

\_\_\_\_\_  
Please Print Name