

# Reserve Study Questionnaire/Bid Form

Please fill out this questionnaire and return to KM Consulting & Construction Management  
via e-mail [jeremy.miller@kappesmiller.com](mailto:jeremy.miller@kappesmiller.com), [james.miller@kappesmiller.com](mailto:james.miller@kappesmiller.com), fax or mail.

**Date:**

<b>Name of Association:</b>	<b>Property</b>
	<b>Address:</b>

**General Questions**

Number of Units: \_\_\_\_\_  
 Number of Buildings: \_\_\_\_\_  
 Date(s) of Construction: \_\_\_\_\_  
 Converted?    Y /    N  
 Date: \_\_\_\_\_  
 Condo         PUD  
 Timeshare    Other:

Reserve Balance:  
 As of: \_\_\_\_\_  
 Annual Reserve Contribution:  
  
 Type of Study:  
 Full Study  
 Update, no Site Visit  
 Update, with Site Visit

**Recently Completed Major Reserve Expenditures**

*(Example: roofing replaced in 2004, cost \$145,000. +/-)*

**Upcoming Reserve Expenditures, Budget \$ and Schedule (if known)**

**H.O.A. Responsibilities; Common and Limited Common Area Items**

- |                                       |                                     |  |  |
|---------------------------------------|-------------------------------------|--|--|
| <input type="checkbox"/> Pavement     | <input type="checkbox"/> Walkways   | <input type="checkbox"/> Retaining Walls | <input type="checkbox"/> Pool/Spa        |
| <input type="checkbox"/> Club house   | <input type="checkbox"/> Garages    | <input type="checkbox"/> Interiors       | <input type="checkbox"/> Roofing         |
| <input type="checkbox"/> Siding       | <input type="checkbox"/> Paint      | <input type="checkbox"/> Decks/Patios    | <input type="checkbox"/> Doors/Windows   |
| <input type="checkbox"/> Elevator     | <input type="checkbox"/> Heat/Vent  | <input type="checkbox"/> Private Sewers  | <input type="checkbox"/> Electric Panels |
| <input type="checkbox"/> Lighting     | <input type="checkbox"/> Sprinklers | <input type="checkbox"/> Fire Alarm      | <input type="checkbox"/> Door Intercom   |
| <input type="checkbox"/> Other: _____ |                                     |  |  |

Contact Name/Title:	Phone:
Mailing Address:	Fax:
	E-mail:
Need Bid By:	<input type="checkbox"/> Call <input type="checkbox"/> Fax <input type="checkbox"/> E-Mail

<i>Office Use Only</i>	Standard	Rush	
Level I (Full Reserve Study)	.....	.....	
Level II (Update with Site Visit)	.....	.....	
Level III (Update w/o Site Visit)	.....	.....	By:.....