

REAL ESTATE DIVISION

**Common-Interest Community Management
GUIDELINES CONCERNING
ACTIVITIES AN UNLICENSED EMPLOYEE
MAY PERFORM**

Careful attention should be given by the responsible Certified Manager or board of directors to ensure only administrative support activities are performed, to properly train personnel, and to assure all activities are supervised.

The following activities would be considered clerical duties which may be performed by an unlicensed employee of a certified manager or board of directors.

Board / Association Meetings

- ❖ Prepare a meeting agenda and disseminate the agenda to fulfill public notice requirements, at the direction of the board or the certified manager
- ❖ Attend board and association meetings to take meeting minutes, to be signed by the board secretary and approved by the board of directors
- ❖ Prepare and send mailings to board members and/or unit owners concerning association business

Association Office Business

- ❖ Compile and distribute resale disclosure information package and Condition of Sale; certification form must be signed by certified manager or appropriate board officer
- ❖ Prepare welcome letters to be signed by certified manager or appropriate board officer ; prepare resident information packet
- ❖ Prepare correspondence or reports under direction of certified manager or appropriate board officer; correspondence must be signed by certified manager or appropriate board officer
- ❖ Prepare collection letters; letters must be signed by certified manager or appropriate board officer
- ❖ Purchase office supplies, within limits/restrictions approved by the board of directors
- ❖ Prepare forms pertaining to the registration of an association; forms must be signed by the certified manager, board of directors, or the declarant to certify the information provided is correct
- ❖ Fill out government response forms (Secretary of State; Office of the Ombudsman); form must be signed by certified manager or appropriate board officer
- ❖ Process paperwork for insurance claims; may not act as liaison with insurance company
- ❖ Verify insurance coverage of contractors
- ❖ Maintain files, such as insurance, owner rosters
- ❖ Prepare and maintain inventory of common elements for association
- ❖ Perform routine inspections of common elements
- ❖ Prepare list of delinquent owner accounts for review by certified manager to trustee company after approval by board
- ❖ Compile submittals for review by Architectural Review Committee

Budget/Financial

- ❖ Review invoices, match/compile documents for invoices; no approval authority
- ❖ Assist with budget preparation
- ❖ Assist with preparation of annual financial statements and disseminate statements
- ❖ Coordinate arrangements for a financial audit or financial review
- ❖ Coordinate bidding processes

**UNDER NO CIRCUMSTANCES SHOULD ANYONE OTHER THAN A
CERTIFIED MANAGER OR APPROPRIATE BOARD OFFICER SIGN A
CONTRACT**

06/01/09