

Community Management



ROYALE MANAGEMENT
SERVICES

Royale Management Services, Inc.

President's Message

OUR MISSION

Royale Management Services, Inc., exists to meet the needs of association owners, board members and officers by providing the highest quality and integrity in association management, accounting and financial services available, while controlling costs and making each community a better place to live for every owner and resident.



Royale Management Services, corporate office

We offer unprecedented access and transparency to the owners, board members and officers of each community we serve. Association records are open and available 24 hours a day, 365 days a year for inspection via our secure web portal, and these records include all checks, invoices, contracts, receivables, deposits, payments and correspondence. Our revenue comes from management fees and disclosed charges included in our management agreement. We do not provide or perform services through

related companies or divisions that add additional margins and profits to our bottom line at the expense of the associations we serve.

We maintain no preferred vendor lists that are based on any form of revenue sharing or other fees. Associations and their boards are free to use existing vendors or other outside services.

We will serve only local associations where owners, board members and officers can have access to all our

professional staff and where we can be sure that all activities are supervised by our senior staff.

The Royale Management Services name is synonymous with superior service, superior not only in quality, but also in spirit. In fact, it's the spirit in which we deliver our service that makes us unique. In a large part, it is the spirit which accounts for the Royale Management Services' difference.

Manager's Role

As an association manager our highly-qualified professional staff and CAM licensed managers work hard to keep your association both physically and financially fit.

Our Accounting & Bookkeeping team maintain

your association's accounting, providing the treasurer, board and owners with up to date financial information including monthly income and expense statements, reserve reports, cash flow statements, accounts payable reports,

receivable maintenance and assessment reports. We also provide detailed listings of every penny received and spent by your association along with the invoices and bills to back them up.

Our CAM licensed managers

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Senior Staff

- Steven J Weil, PhD, EA, LCAM
President
- Theresa J Weil, PhD, EA
Treasurer
- Jacob Weil, Esq, EA
In House Counsel
- Samantha Spencer, LCAM
Dir. of Finance & Compliance
- Lorri Hill, LCAM
Dir. of Property Management
- Katherine Avis
Payroll Supervisor
- Jill Goldberg
Administrative Assistant

Services

Property Management

- Assist the board in a competitive bidding process for non-emergency services and provide input in selection of contractors
- Obtain from each contractor relevant certificates of insurance and licenses
- Direct contractors providing recurring services and monitor specific contractor performance to ensure compliance with contract specifications
- Perform regular site inspections in order to maintain a satisfactory knowledge of the condition of the property and the performance of the contractors
- Receive service requests for repairs or maintenance of property and report trends in service requests to the board of directors
- Arrange for prompt and satisfactory response to emergency service requests
- Advise board of major problems or trends in maintenance service requests as they occur
- Provide and monitor our 24 hour emergency telephone service
- Supervise association employees

Accounting & Bookkeeping

- Posting and tracking payments by owners of maintenance fees and assessments
- Posting check and payment of all vendor invoices and other payables
- Complete monthly financial statements
- Budget vs. Actual Comparison
- Income & Expenses
- Balance Sheet
- Reserve Report
- Cash Flow Statement
- Statement of Owner Maintenance & Assessments Due & Paid
- Reconciliation of Bank Accounts
- Detailed General Ledger
- Complete Document Imaging all invoices, checks, deposits & original records
- Preparation of employment and income tax returns
- Coordination of Annual Audits & Reviews as required by law



Financial Management

- Collection, Deposit and Posting of all maintenance and assessment payments received
- Posting of late payment fees to owner accounts and mailing of past due notices
- Provide a monthly delinquency list to the board of directors with past due balances
- Preparation and development of annual operating budget with the supervision and input of the board of directors or committees appointed by the board.
- Receive review and approve all vendor invoices and other bills for payment by the association
- Prepare checks for signature of treasurer and/or appropriate board members to pay association expenses and bills
- Mailings to owners as directed by the board of directors of: approved budgets, annual financial statements, notice of annual meeting, board election materials and other items as directed by the board of directors
- Assist the client's legal counsel, as necessary, to initiate required legal action consistent with the Association's By-Laws, Covenants, Conditions and Restrictions
- Maintain all association records as required by law
- Image and provide Board Members and Owners access to all association records on a secure web portal that allows documents to be reviewed and accessed over the internet



Our staff of caring professionals are here for you!

Manager's Role continued from page 1

supervise your association's vendors and contractors, they also review bids and proposed services agreements. CAM managers assist your board to stay in compliance with all the complex rules the State of Florida sets out under Chapter 718 and 720 for the operation of community associations. They do this by communicating with the board regularly and keeping them up to date on association projects, problems and owner inquiries. Managers see that all meeting notices are correctly prepared and posted. They also see that a packet is prepared for each board meeting containing everything board members need to be prepared and informed about the items on the agenda. Our managers work with owners to solve complaints and problems.

Our support staff includes field services personnel, clerks, accountants, supervisors and receptionists that all work

together with the managers to assure that board members, owners and residents get the prompt courteous service that makes us the number one choice for managing your community.

Our Florida CAM licensed field services managers perform a weekly walk through of your association property. During this walk through they see that all outside contractors and vendors are performing up to their contract specifications. They note any maintenance items and any changes in the overall condition of the property. They also note owner non-compliance items so that a friendly reminder can be sent by our staff to owners that are violating the rules.

Our reception and clerical staff ensure that your phone calls are answered by a live human any time you, board members or owners call us between 9AM and 5PM Monday through Friday. They also see

that your call gets routed to someone who can and will assist you.

We maintain an open door policy. Board members, owners and renters are free to stop by our offices any time between 9AM and 5PM Monday through Friday to meet with any of our managers, staff or principals.

We provide emergency afterhours service through our emergency dispatch number, so there is always someone just a phone call away should the need arise.

Our principals are a husband and wife team that have over 40 years of management, accounting, banking and financial management experience. You are free to meet with them whenever you wish. They also maintain an open door policy and are happy to meet with board members, owners and others involved in your association.

Frequently Asked Questions

How long have you been in business?

The firm was founded in 1984 to do business consulting and property management; accounting and tax services were added in 1986 with Community Association Management added in 2000.

How long have you been a Community Association Management company?

Since 2000

How many employees do you have?

22

How do you provide superior customer service?

We answer the phones with a live person during normal business hours. This live person will assist you or transfer you to someone that can. Board members and owners are also free to drop by our offices during regular business hours. We also make all association financial information, documents and records available on line for owners and board members. Our

professional staff can easily be reached by email or phone.

How do you choose vendors to work for the association?

For small items that are non recurring we will make call to vendors that have worked with the association in the past or whom we have worked with, or who are recommended . Larger items and recurring items we produce an RFP (Request For Proposal) which spells out the full scope of the work to be performed along with the terms and other requirements, this RFP is submitted to the board for review and then submitted to vendors for written proposals. The proposal is submitted to vendors who have requested to bid on projects we manage along with any vendor recommended by the board . All vendors submitting a proposal and /or working on the association property must provide proof of insurance and license.

We check references and submit all proposals to the board along with

management recommendations. The board or designated committee makes the final decision on which vendors will be used.

Is your firm compensated or do you receive any fees from vendors?

No, we work for the association and we do not receive any compensation from vendors.

What is the length of the contract?

Our agreements are for a term of one year, but they are also cancelable with 30 days notice. We do not believe that long term contracts are the way to get and keep clients. We want to earn your business every day.



Royale Management Services' Code of Conduct

1) We will always tell the truth and do the right thing, putting what is good for the association first and foremost.

2) All phone calls during office hours will be answered by a member of our staff who will do whatever they can to provide assistance, transfer your call to someone that can assist you or take a message and have your call returned in a timely manner.

3) We shall strive to serve, not just the letter of the law, but also the intent of the law. We will do this by following all laws that govern the association and its operations while treating all owners, board members, and guests of the association with respect. We will do this by following and enforcing the bylaws, governing documents, association rules consistently and without prejudice. We will not enforce rules against one owner without enforcing them against all owners equally.

4) We will operate with total transparency, making all association records (other than those considered confidential by law) easily available to all owners through our secure online web portal. We will also answer questions from board members and unit owners in a timely manner, honestly, and to the best of our ability.

5) We will treat all board members, owners, tenants, guests and vendors of the association with respect.

6) We will make sure our managers, staff and association board members have access to the highest quality continuing education. Education designed to assist them in understanding the legal, ethical, financial and operational aspects of association operations.

7) We will not solicit or receive any remuneration or payment of any kind from association vendors. We will avoid both true conflicts of interest as well as any appearance of a conflict of interest in all our dealings on behalf of associations we manage.

8) We will not maintain a preferred vendor list (although we may maintain a list of vendors that have failed to treat association properly in the past or who have delivered subpar performance). We will provide an opportunity to bid on association contracts to any qualifying contractor and will allow the association to continue with their current vendors as long as those vendors are providing satisfactory services to the association and can provide proof of license, liability insurance and workers compensation insurance.

9) We will provide guidance to the board within our areas of expertise and recommend the use of outside experts when the scope of an activity is beyond our knowledge or qualifications. This includes but is not limited to recommending consulting with association legal counsel, consulting with a qualified engineer or other experts.

10) Our engagement agreements will be 30 day cancelable and we will maintain our relationship with the associations we manage by delivering the highest quality service available and earning their business every day.

11) We will provide complete monthly financial reporting that includes not only an income statement and balance sheet but also a complete general ledger listing all transactions, past due owner payments, payables listing and bank reconciliation.

12) We never commingle association fund with the funds of our firm. All association funds will be maintained in separate bank accounts belonging to the association. Only the designated board members will have check signing and disbursement authority over association funds. We will maintain all reserve funds in a separate association accounts and not permit them to be used except as allowed by law.

13) We will copy all board members on any communication we have with any one board member, making sure that all members of the board are aware of any requests, issues or problems. Thereby keeping all board members fully informed and avoiding a situation where one board member has or receives information that the whole board does not have access to.

14) We will not participate in association politics by expressing an opinion on the qualifications of any board members or prospective board members. The choice of who serves on the board is an owner's choice and we shall not make any attempt to influence an election or its outcome.

15) We will support the decisions of the board once properly made to the best of our ability even if we do not agree with the decision as long as it does not violate the law or governing documents.

16) We recognize that all association records and other property being held by management is the property of the association and will return all records and other property to the association or its designated representative promptly at the conclusion of our engagement.

17) We will never hold up or interfere with the relationship between the association and its employees. We shall neither ask for nor require association employees, vendors or contractors to agree to or be bound by a non-compete agreement and they shall be free to continue their relationship with the association even if they were procured through or trained by us as management.

Annual Meeting Tips

As associations plan their annual meetings, we thought we would share a few tips and reminders with everyone.

The annual meeting is a member meeting, hence every member can participate. Participation is by properly made motions, seconds, taking part in discussion of motions and through voting.

The first order of business is to appoint the chairperson to run the meeting. The chairperson can be anyone that the members agree should chair the meeting. In many associations the board president chairs the meeting; however this requires approval of the members. Some associations ask their manager or attorney to chair the meeting which is acceptable as long as this is approved by the membership. In large associations having a professional chair the meeting can help to keep it on track and see that the required business gets done properly.

A motion can be made by any member of the association as to who shall chair the meeting. This motion must be seconded and then voted on by the members present. If the motion is approved by a majority of the member's present, the chairperson is elected for the meeting.

The Second order of business is to determine whether a quorum of the members is present in person or by proxy. The quorum requirement is spelled out in the association documents or by state statute. Without a quorum no business can take place at the meeting. However, ballots must still be collected.

The third order of business is to appoint the election monitors. Election monitors will supervise and participate in the counting of the ballots cast. Election monitors may not be candidates for the board or members of a candidates' family.

The fourth order of business is to collect the ballots. All ballots received by mail prior to the election and brought to the meeting should be delivered to the election monitors and placed in the ballot box.

Ballots must be collected, all ballots must be in properly cast (enclosed in an outside envelope which shows the unit number, name of voting member and signature and then enclosed in an inner envelope which should not provide any identity information).

Note ballots cannot be accepted once the counting process begins. So it is important to make an announcement that all ballots must be cast before the counting can begin and to not accept any additional ballots once the counting process has begun.

Ballots are then verified to the association ownership records and voting certificates. Units with more than one owner, units owned by a trust or units owned by a corporation must have a voting certificate on file that shows who is authorized to vote for the unit.

For the election to be valid and counting to continue at least 20% of the eligible unit owners must of cast a ballot.

Next the outside envelopes are opened and separated from the ballots which are still sealed in the inner envelope. Once all outside envelopes are opened the ballots are returned to the ballot box and mixed before opening the inside envelope. Ballots are then opened and counted.

At the conclusion of the ballot count the results are announced and the ballots, counts, outer and inner envelopes must be saved as part of the association's official records for a period of 3 years.

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Annual Meeting Tips (continued)

The fifth order of business (if a quorum is present) is the reading and approval or waiver or reading and approval of last year's meeting minutes.

The sixth order of business is to conduct the remaining business of the association including; the reading or presentation of any officer and or committee reports; old business from last year; new business for this year; owner comments and questions.

Last thing to do is to adjourn the meeting the chairperson can ask for a motion to adjourn the meeting which must be seconded and voted on by the members.

It should be noted that in most associations, newly elected board members begin their term immediately once the vote has been concluded.

It is also advisable to schedule an organizational board meeting to immediately follow the annual meeting in this way officers can be appointed and take their positions without a lapse in leadership.

A Guide to Being Politically Smart for Board Members

Whether you serve on the board of a condominium or HOA, it's important to be politically smart. As a board member, owners may not only look to you for leadership, they may also look to you as someone to blame when things just don't go their way. Being politically smart will help you avoid conflict and make your life easier.

There are a few simple rules to being politically smart that will make being on the board easier and less stressful.

Rule one: never make it personal. While it's ok to disagree with a fellow board member or an owner, be sure you disagree with an act or decision and that you do not attack the person you disagree with or make any disparaging remarks about them.

Rule two: be prepared. When answering questions or participating in a meeting, have the facts about decisions that will come before the board and know what you are talking about before answering any questions from owners. If you don't know something, don't fake it, say so and then find out how and where you can get the information you need.

Rule three: listen to the experts. Your association hires professional managers, engineers, attorneys and many others who have loads of experience and knowledge in

their fields, their opinion should carry more weight than those of non-experts. Your association hires these experts to help make sure that things are done correctly and that the association is protected from unnecessary liability. They should be treated as partners not as peddlers.

Rule four: be transparent. Keep your fellow owners and the rest of the board informed. Owners have a right to know how their association is being managed. This includes a right to see the books, contracts and all of the other association records (except those which must be kept confidential by law). The easier you make it for owners to have the facts the less you will have to deal with rumor and innuendo.

Rule five: give everyone a chance to be heard. This does not mean you have to respond directly to everything that is said. In most cases it's a good idea to let any owners that have questions or comments for the board at a meeting to ask their question or make their comment without making a direct response until all owners have had a chance to speak. This saves time and avoids confrontation by not allowing a question or comment to turn into a personal argument. Sometimes people just need to vent and it's best to let them vent and say nothing more about it then 'thanks for letting us know your concerns'.

Rule six: give yourself credit when credit is due. The board always gets blamed when something goes wrong, but it seldom gets the credit when something goes right. It's ok to toot your own horn and let folks know about the cost saving measures the board approved or the project that has been successfully completed.

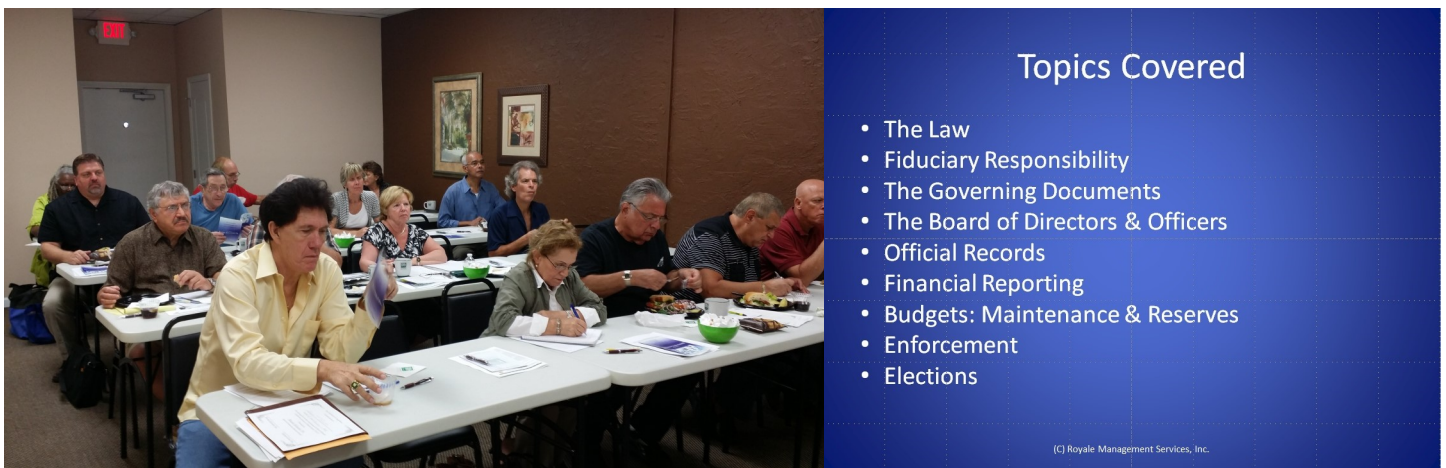
Rule seven: don't say anything or write anything down you would not like to see published in the newspaper or headlining the news on TV. Think twice before you send that email or make a disparaging remark about anyone.

While politics is a dirty word in some circles, for a board member, being politically smart can mean the difference between conflict and peace on the home front. The true mark of a good board member is not how well he or she says yes to owners' requests or how often they agree with their fellow board members, it's how they deal with ideas they disagree with and people that are disagreeable without creating ene-



FREE Condominium Board Member Certification Classes

This course takes place the 2nd Monday of every month. The course is sponsored and held at the offices of Royale Management Services, Inc. located at 2319 N Andrews Avenue, Fort Lauderdale, FL 33311. Networking will begin at 5:30 PM and the presentation will begin promptly at 6:00 PM. Reservations are required!



This is a hands on class that will help you understand: the basics of how to keep yourself and your association out of trouble, what's legal and what's not, what it means to be a fiduciary, how boards should function, what records must be kept, what kind of financial information you should get, how to use that information and much more. We take a managers approach to getting things done, avoiding problems and protecting both the integrity of the association and that of the board. Best of all we will provide plenty of time for questions and examples.

For Reservations call 954-563-1269 between
9AM and 5PM Monday through Friday.
Seating is limited so make your reservations early.

This class meets the Florida state requirements for board certification and has been approved by The Division of Florida Condominiums, Timeshares, and Mobile Homes. It meets the requirements Florida 718.112 for Condominium Association Board Members.

Royale Management Services, Inc.

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ROYALE MANAGEMENT SERVICES



Private Web Portal

All our community association clients get access to a private web portal. This portal provides Secure Internet Access for board members and owners to the latest association information from their home computer including:

- Complete access to monthly financial statements and accounting information
- Complete access to all paid bills, invoices, past due assessments and other notices
- Copies of all meeting minutes for board and annual member meetings
- Copies of all insurance policies and other association contracts
- Copies of governing documents
- Copies of all rules and association policies
- Printable forms
- Association meeting announcements

All documents and records stored on the secure web portal can be down loaded and viewed or printed by board members and owners on their local computer.

Automate Your Maintenance Payment



Relax we have got you covered.

Did you know that all monthly maintenance fees and special assessments can be paid automatically by ACH Debit each month? This is the same automatic process many of us use to pay insurance premiums and other recurring expenses, and signing up is as simple as

completing an Automatic Payment form when your association is managed by Royale Management Services.

You can choose to automatically pay just your monthly maintenance fees or to pay monthly maintenance fees and other assessments automatically each month. Payments will be processed and deducted from your designated bank account on the 2nd of each month and timely deposited to the association's bank account. Best of all there is no additional cost to the association or owner for this convenient service.

Why automate your payment? Automatic payments save you time and the cost of mailing a check. Automatic payments happen even if you are out town or on vacation. Automatic payments assure you that payments will be made timely and late charges will be avoided.

Want to know more about automatic payments. Call us 954-563-1269 or 800-382-1040.

WEBSITES YOU MAY FIND USEFUL

www.royalemanagement.com

www.rmsaccounting.com

www.broward.org/revenue

Royale Management Services, Inc.

