



Services That Take Work Off Your Plate

Our service plans are built around a simple principle: **give boards the support they need, where they need it most.**

This document outlines two distinct service options, each designed for different community sizes, structures, and management preferences. You'll find clear comparisons, detailed service descriptions, and transparent explanations of what's included in each plan.

Our goal is to help your board make an informed decision that serves your community's best interests, while freeing up your time to focus on strategic governance rather than day-to-day operations.



Full-Service with CAM

Our Full-Service plan delivers comprehensive management support for associations that need consistent, hands-on oversight.

This plan is recommended for communities transitioning from another management company, associations with amenities like pools or clubhouses, or neighborhoods with more than 50 homes or units.

With this plan, you gain a complete management partnership.

Your dedicated Community Association Manager (CAM) becomes an extension of your board, attending meetings, providing strategic guidance, and coordinating all aspects of community operations.

Behind your CAM stands a specialized support team handling finances, compliance, vendor coordination, and administrative tasks.

What's Included:

- **Financial & Accounting Management**
 - Professional collections coordination.
 - Tax filing & 1099 processing.
 - Closing documents & resale package support.
 - Monthly financial reporting and reconciliation.
- **Full Administrative Support**
 - Responsive service for residents and board members through phone, email & portal.
 - 24/7 Resident A.I. Assistant.
- **Monthly Compliance Inspections**
 - Consistent enforcement with photo documentation.
- **Vendor Oversight**
 - Professional coordination of maintenance, repairs, and services providers for common areas.
- **Dedicated CAM Partnership**
 - Experienced manager for meetings, strategy & board support with industry expertise.



All-in support for associations that need hands-on management and consistent oversight.

Financials-Only

Our Financials/Accounting-Only plan provides professional financial management, while your board maintains operational control.

This plan works exceptionally well for smaller associations with fewer than 50 homes or units, communities without amenities, or boards that prefer to handle administrative and compliance matters internally.

Self-managed associations face a common challenge: board members with professional expertise in many areas, but accounting and financial management often falls to volunteers without specialized training. Financial mistakes can be costly, and audit findings can create liability concerns. This plan solves that problem by placing your finances in the hands of experienced professionals while preserving your board's autonomy over other aspects of community management.

You'll receive the same robust financial infrastructure that larger communities enjoy: budgeting support, monthly reconciliation, accounts receivable and payable management, tax filings, and closing document preparation. Your board retains full visibility through our web portal and receives responsive support for financial questions.

Meanwhile, you maintain direct control over vendor relationships, compliance decisions, and resident communications.

What's Included:

- **Financial & Accounting Management**
 - Professional collections coordination.
 - Tax filing & 1099 processing.
 - Closing documents & resale package support.
 - Monthly financial reporting and reconciliation.
 - Homeowner financial account support via phone, email & portal.



Ideal for communities that manage operations internally but need professional financial accuracy.

Compare Our Plans

Understanding which service plan fits your community starts with seeing the differences clearly.

Service Category	Full-Service with CAM	Financials-Only
Financial Management & Reporting	✓ Included	✓ Included
Budgeting Support	✓ Included	✓ Included
Collections & AR Management	✓ Included	✓ Included
Tax Filing & 1099s	✓ Included	✓ Included
Insurance Guidance	✓ Included	✓ Included
Homeowner Financial Support	✓ Included	✓ Included
Dedicated Community Association Manager	✓ Included	—
Monthly Compliance Inspections	✓ Included	—
Vendor Coordination & Oversight	✓ Included	—
Architectural Review Support	✓ Included	—
Meeting Attendance & Management Reports	✓ Included	—
Common Area Maintenance Oversight	✓ Included	—
Amenity Management	Optional Add-On	—



Our Service Areas

Behind every service we provide stands a specialized team focused on delivering consistent, professional results.

Our service categories represent dedicated support systems designed to handle the complex, time-consuming tasks that board members often struggle to manage alongside their regular jobs and personal commitments.

The following sections explain each major service area in detail.

- Financial Management
- Insurance Guidance
- Vendor Maintenance
- Compliance Enforcement
- Architectural Review Support
- Amenity Management
- Additional Services

You'll learn exactly what's included, how we deliver each service, and which specialized team members support your community behind the scenes. This transparency helps boards understand not just what they're getting, but how our systems work to protect your community's interests and maintain quality standards.

Whether you're evaluating our Full-Service with CAM plan or considering the Financials-Only option, these detailed descriptions will help you assess how our services align with your community's specific needs and your board's bandwidth for handling various aspects of association management.



Financial Management

Financial management forms the foundation of every well-run association.

Your community's finances require accuracy, transparency, and expertise that goes beyond basic bookkeeping. We handle the complete spectrum of financial operations: from monthly reconciliation and reporting to budgeting, assessments, tax filings, and vendor payments. This comprehensive approach gives your board financial clarity and peace of mind, knowing that trained specialists are managing every dollar with professional oversight.

When you work with All-In-One, you're not getting a single bookkeeper trying to handle everything. Your financial management is supported by a specialized team working together: an **Accounting Controller** who oversees all financial operations, an **Accounts Receivable Specialist** managing homeowner payments and collections, an **Accounts Payable Specialist** handling vendor payments and processing, and a **Reconciliation Specialist** ensuring every transaction is properly recorded and balanced.

This team structure provides checks and balances that protect your community's financial integrity.

- A full financial team behind your board, without the overhead costs of hiring multiple specialists.

Real-Time Financial Access

Board members can view current financials anytime through the web portal

Expert Budgeting Support

Professional guidance using historical data and industry benchmarks

Complete AR/AP Management

Professional handling of all money coming in and going out

Tax Coordination

1099 preparation and tax filing support with certified expertise



Insurance Guidance

Insurance represents one of your community's most critical protections, yet policy management often gets overlooked until a claim arises.

We work alongside your licensed insurance agent to help maintain accurate coverage, coordinate claims when they occur, and support board decision-making throughout the policy lifecycle. While we don't replace your insurance agent, we serve as an informed liaison who understands association insurance needs and helps ensure nothing falls through the cracks.

Our **Insurance Specialist** uploads and organizes all policy documents in your web portal, making them easily accessible when you need them. When renewal time approaches, we can assist with policy reviews and coordinate obtaining competitive quotes if your board requests them. Should a claim occur, we provide coordination support to help the process move smoothly, though complex claims may involve additional fees depending on the scope of work required.

Beyond basic policy management, we coordinate the production of association-required documents like certificates of insurance for vendors, insurance summaries for closing packages, and policy verification for homeowner requests.

This administrative support ensures your insurance documentation stays current and accessible without requiring board members to track down paperwork or navigate insurance company procedures.

Policy Organization

All insurance documents uploaded and maintained in your web portal

Review Assistance

Support with policy reviews and quote coordination at renewal

Claims Support

Coordination assistance when claims arise (fees may apply)

Document Coordination

Production of required certificates and insurance summaries



Vendor Maintenance

Effective vendor management requires constant attention: monitoring service quality, coordinating repairs, obtaining competitive quotes, and ensuring vendors show up when promised. For many volunteer board members, vendor coordination becomes one of the most time-consuming and frustrating aspects of association management.

Our Full-Service plan removes this burden by providing professional vendor oversight that ensures consistent service quality and smooth coordination across all common area maintenance and repair needs.

We support your board throughout the entire vendor lifecycle. When selecting new vendors, we help review qualifications and coordinate the RFP process. For routine maintenance, we source quotes based on board-defined scopes, ensuring you receive competitive pricing from qualified contractors. Once work begins, we manage work orders and invoice processing, verify that services were completed as specified, and maintain regular communication with vendors to address any issues before they escalate.

Beyond administrative coordination, we conduct regular checks of your common areas, identifying maintenance needs before they become expensive emergencies. This proactive approach helps boards make informed decisions about when to schedule preventive maintenance and when immediate repairs are necessary.

Vendor Selection Support

Help reviewing qualifications, obtaining references, and coordinating proposal comparisons

Quote Coordination

Sourcing competitive bids based on board-defined project scopes and specifications

Work Order Management

Tracking service requests from initiation through completion with documentation

Professional Guidance

Recommendations on maintenance priorities and decision-making for repair vs. replacement



Compliance Enforcement

Fair, consistent, and legally aligned compliance enforcement builds community standards while maintaining positive homeowner relationships. Many boards struggle with enforcement, either avoiding it to prevent conflict or applying rules inconsistently, which creates fairness concerns.

Our compliance system delivers professional oversight with monthly inspections, clear communication to homeowners, and a focus on resolving issues rather than escalating fines unnecessarily.

Every month, our **Site Review Specialist** conducts community inspections following your governing documents and board-approved guidelines. When violations are identified, we document them with photos and send respectful notices that clearly explain the issue and required correction timeline. Our compliance tracking portal allows boards to monitor all open violations, review resolution progress, and ensure consistent application of community standards across all homeowners.

Behind this system stands a specialized team: a **Compliance Lead** who oversees program consistency, Site Review Specialists who conduct inspections and documentation, and **Resolution Specialists** who communicate with homeowners and track compliance through completion.

This team structure ensures professional handling at every stage while maintaining the respectful tone that preserves community relationships.

Monthly Inspections

Regular community reviews for consistent enforcement

Photo Documentation

Clear visual records of violations and resolutions

Tracking Portal

Tracking service requests from initiation through completion with documentation

Respectful Communication

Professional, courteous notices to homeowners

Resolution Focus

Emphasis on fixing issues, not escalating fines



Architectural Review Support

Architectural review can become a bottleneck when boards handle it manually. Homeowners submit incomplete applications, committees lack organized systems for review, and tracking decisions becomes difficult when relying on email threads and paper files.

Our architectural review support streamlines this entire process so your ACC or ARC committee can make faster, more consistent decisions based on complete information.

Our **Architectural Request Specialist** manages the submission and tracking system, ensures homeowners provide all required documentation before committee review, and maintains clear communication between owners and the committee throughout the process. When questions arise about guideline interpretations, we provide document-led guidance based on your architectural standards and prior committee decisions.

All architectural submissions and decisions are stored digitally for easy future reference. When similar requests arise, your committee can quickly review how previous applications were handled, ensuring consistency in decision-making. This organized record-keeping also proves valuable during property sales when buyers or title companies request information about prior approved modifications.

We handle the administrative workflow so your ACC/ARC committee can focus on making thoughtful decisions about proposed changes rather than chasing paperwork and coordinating communications.

From initial submission through final approval, we manage the entire process with organized tracking, clear homeowner communication, and documented decisions that create consistent precedents.

Organized Submission

Homeowners submit requests through a clear, structured process

Committee Review

Complete applications with all required documentation and context

Clear Communication

Professional correspondence between committee and homeowners

Digital Records

Stored decisions for consistency and future reference



Amenity Management

Communities with amenities like pools, clubhouses, fitness centers, or gated access face unique management challenges. Access control, rental coordination, and troubleshooting require consistent attention and responsive service.

Our optional Amenity Management add-on provides secure, organized, and resident-friendly management of access devices, facility rentals, and gate operations, ensuring your amenities remain valuable community assets rather than sources of board frustration.

Access management requires careful coordination: issuing keys, cards, or fobs to authorized residents, updating access codes when needed, deactivating devices for delinquent accounts or departing residents, and troubleshooting access issues when residents get locked out. Our **Amenity Access Specialist** handles all these tasks while maintaining an accurate access database that ensures security and proper authorization.

For communities with rentable facilities, our **Amenity Reservation Specialist** manages the booking calendar, coordinates rental requests, collects applicable fees, and communicates facility rules to renters. This professional coordination prevents double-bookings, ensures proper fee collection, and maintains facility standards through clear communication of usage guidelines.

Access Device Distribution

Professional issuance of keys, cards, fobs, and codes

Troubleshooting Support

Responsive help when residents experience access issues

Rental Coordination

Booking, scheduling, and fee collection for facility rentals

Database Maintenance

Accurate records of all authorized access

☒ INCLUDED IN ALL PLANS

Additional Services Included

Administrative Support

Responsive assistance via phone, email, and office visits for homeowners and board members

Community Web Portal

24/7 access to documents, financial information, and community resources

24/7 Resident AI Assistant

Instant answers to common questions about payments, policies, and procedures

☒ FULL-SERVICE PLAN

Full-Service Exclusive Benefits

Communities on our Full-Service with CAM plan receive additional strategic support that goes beyond day-to-day operations. These services provide the board partnership and professional guidance that help associations navigate complex decisions, plan effectively, and maintain strong governance.

Dedicated CAM Partnership

Your CAM brings industry expertise, local market knowledge, and professional guidance to support board decision-making.

Meeting Attendance

Your CAM attends annual meetings and monthly board meetings, providing continuity, professional facilitation support, and real-time guidance on procedural questions.

Management Reports

Monthly reporting provides boards with clear visibility into all management activities: compliance status, vendor performance, pending items, and recommended actions

Designed to Meet Your Community Where It Is

Every HOA and condo community has its own character and challenges. Some boards have members with time and expertise to handle operational oversight but need professional financial management. Other communities require comprehensive support across all management functions. We've designed our service plans to meet these different needs without forcing communities into one-size-fits-all solutions.

2

Service Plans

Flexible options designed for different community needs and management preferences

10+

Specialized Roles

Dedicated team members supporting your community across all service areas

24/7

Portal Access

Round-the-clock access to financial data, documents, and community resources

Whether your community needs full management support with a dedicated CAM or just expert financial oversight while you manage operations internally, our service plans are built to give your board confidence and consistent follow-through at every step.

Behind each plan stands a team of specialists focused on delivering professional results in their areas of expertise: financial management, compliance coordination, vendor oversight, and administrative support.

We understand that choosing a management company represents a significant decision for your community. We hope our transparent approach to service descriptions helps your board evaluate whether our offerings align with your specific needs and expectations. We encourage you to consider not just what services you need today, but what support would help your board operate more effectively while reducing the volunteer burden that often leads to board member burnout.

The right management partnership should reduce stress, improve operations, and free your board to focus on strategic governance rather than administrative tasks. We invite you to discuss which service plan best fits your community's current situation and future goals.

Our team is here to answer any questions, provide references, and help your board make an informed decision to meet your community's management needs.