TruPoint
PROPERTY ADVISORS

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Reserve Study Plus

The funding plan, with a plan of action.

WHAT A STUDY GIVES YOU

- A financial plan for big projects when they come due.
- Fewer special assessments and loans.
- A clear picture for owners.
- Peace of mind, without financial surprises.
- A more attractive community to prospective buyers.

STUDY TYPES

Level I, Full Study

For a first study, or when the last one is out of date. We inspect every building, measure and document everything the association maintains, and build the 30 year plan from scratch.

Level II, Update With a Site Visit

Every third year between full studies. We inspect the property again, check the condition of each item, and update costs, remaining life, and the funding plan.

Level III, Update Without a Site Visit

For the years in between. We update the study from the office using your records: current costs, completed projects, and the reserve balance.

WE don't stop at the numbers.
Every TruPoint study comes with an Action Plan.

The board gets photos and the condition of each item, the recommended fix, when to do it, and a budget range.

Every TruPoint study is prepared to Community Associations Institute reserve study standards and quoted after the free Initial Property Review.

Turn over to see how we build your study.

OUR PROCESS

How we build your Reserve Study.

THE PROPERTY	1 Review existing community documents.	2 Thoroughly inspect all buildings.	3 Document age and condition.
THE PLAN	4 Confirm cost of replacement for each component.	5 Arrange multiple funding scenarios.	6 Provide the full reserve plan and Action Plan to the board.
THE BOARD	7 Host a meeting to review the plan with the board.	8 Revise the plan based on the review.	9 Deliver the final packet.

AFTER THE STUDY

Need help with what comes next? We're ready when the board is.

- **Scope Build**
- **Bid Processing**
- **Project Oversight**
- **Consulting**
- **Insurance Review**

Where can we help?

Bring us your challenges and existing data. We'll bring suggestions and build the plan with you.

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Scan to book the free review