

Board Turnover Checklist:		Date:	Initials
Leaving the Board:			From / To:
OnBoarding:			
Keys/Codes:			
Post Office Box Keys			
Splash Pad Control Box Code			
Sprinkler Control Box Code			
Physical Property (Installed):			
3 metal No Pets Signs on 3 park gates			
3 Metal Resident & their guests only signs on 3 park gates			
2 No Motorized Vehicles signs on path at 16th and 13th Streets			
2 Garage Sale Sign Banners			
Garbage Can(s) located in the park			
Sprinkler Housing Covers - Fake Rocks - in place			
Christmas Decorations - _____ Lg Plastic Storage Bins:			
16 Wreaths with bows/dec's for Entrances signs and island trees			
_____ Lighted Garland swags to cover 4 Entrance signs			
_____ White Christmas Lights to light Entrance Island trees			
_____ Timers			
_____ Extension Cords			
Notebooks/Manuals:			
ByLaws & Covenants w/ Amendments - Important Date List, Password List, Historical Board Roster, Secretary of State & IRS EIN No.			
Updates contacts, Developer Turn Over Letter			
Insurance Policies			
Contracts - Maintenance - Mgmt.			
*Financial Yr End Note books, 2023, 2024, 2025			
*Financial YTD Notebook 2026			
<i>Financial notebooks include: Bank Statements, Check registers, Annual Budget, Invoices, CPA Review</i>			
Attorney Info -Legal Proceedings			
Board & Annual Meeting Minutes			

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Filing Bin(s):	
Homeowner Files By Acct #: For those homeowners with correspondence incl: ACC Applications/ Approvals/Denials, Violation/ Collection/Letters/ Liens	

Financial:	
Checkbook Cover	
Remaining Checks	
Remaining Deposit slips	
Check Endorsement Self Ink Stamp	

Boxes:	
Annual Meeting Sign in, Proxies and Ballots	
Welcome Basket Donated Items	
MAPS	

Electronic Files:	
Accounts Receivable/Current Roster with Contact Info.	
A/R detail list of liens with interest accural figures	
Late/Lien notice copies sent	
Insurance Policies	
Contracts - Maintenance - Mgmt.	
Financial Info: Bank Statements, Check registers, Annual Budgets, Invoices, CPA Review	
HOA Letterhead & Logo	

Office Supplies:	
___ Notebooks	
___ Dividers	
Postage	
HOA Return address printed envelopes	
HOA Return address printed window envelopes	