

# Request for Proposal

## Reserve study



Please complete this form and return it to our office. Be as detailed as possible. The more information we are able to obtain, the more accurate our proposal will be.

3160 Telegraph Road, Suite 203  
Ventura, California 93003

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Reserve studies since 1982

1	Today's date	<input type="text"/>
	Date proposal needed	<input type="text"/>
	Site Inspection Required	<input type="text"/> (yes or no)
	Date reserve study needed	<input type="text"/>
	How did you hear about us?	<input type="text"/>
	Special comments / issues / concerns about reserve study	<input type="text"/>

2	<b>Contact Information</b>				Phone	<input type="text"/>
	Name:	<input type="text"/>			FAX	<input type="text"/>
	Management Company Name	<input type="text"/>			Email	<input type="text"/>
	Address	<input type="text"/>				
	City	<input type="text"/>	State	<input type="text"/>	Zip	<input type="text"/>

3	<b>Property / Association Contact Information (if different)</b>						
	Name:	<input type="text"/>				Phone	<input type="text"/>
	Association Name	<input type="text"/>				FAX	<input type="text"/>
	Address	<input type="text"/>				Email	<input type="text"/>
	City	<input type="text"/>	State	<input type="text"/>	Zip	<input type="text"/>	Web

4	<b>Property / Association Description</b>					
	Type:	<input type="checkbox"/> Planned Development	<input type="checkbox"/> Condominium/Co-op	<input type="checkbox"/> Timeshare	<input type="checkbox"/> Commercial	<input type="checkbox"/> Other
	# of Lots / Units	<input type="text"/>	# of buildings	<input type="text"/>	# of stories	<input type="text"/>
	Year built	<input type="text"/>	(Approximately)			
	Fiscal year begins	<input type="text"/>	(Month or date)			
Date of last reserve study	<input type="text"/>					

<b>Building Identification</b>					
Check if Applies	Building Type / Name	Quantity	Square Feet (Approx)	Plans Available?	Comments
<input type="checkbox"/>	Condominium	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Clubhouse	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Parking Garage	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Guardhouse	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Maintenance Building	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Pool Equip Building	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Pool House	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Tennis Shop	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Golf Pro Shop	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

**6 Building Exterior Detail**

<input type="checkbox"/>	Roofs	# _____	<input type="checkbox"/>	Paint, Exterior	# _____	<input type="checkbox"/>	Garage Doors	# _____
<input type="checkbox"/>	Utility Doors	# _____	<input type="checkbox"/>	Decks/Balconies	# _____	<input type="checkbox"/>	Lighting	# _____
<input type="checkbox"/>	Steps, Stairways	# _____	<input type="checkbox"/>	Patio Fence	# _____	<input type="checkbox"/>	Car Ports	# _____
<input type="checkbox"/>	Fire Extinguisher	# _____	<input type="checkbox"/>	Railing	# _____	<input type="checkbox"/>	Underground Parking	# _____
<input type="checkbox"/>	Heat, Air Conditioning	# _____	<input type="checkbox"/>	Awnings	# _____	<input type="checkbox"/>	Parking Structure	# _____
<input type="checkbox"/>	Gutters/Downspouts	# _____						
<input type="checkbox"/>	Other	# _____	Description _____					

**7 Building Interior Common Area & Equipment Detail**

<input type="checkbox"/>	Lobbies	# _____	<input type="checkbox"/>	Carpeting	# _____	<input type="checkbox"/>	Furniture	# _____
<input type="checkbox"/>	Hallways	# _____	<input type="checkbox"/>	Elevators	# _____	<input type="checkbox"/>	Trash Gates	# _____
<input type="checkbox"/>	Draperies, Blinds	# _____	<input type="checkbox"/>	Laundry Rooms	# _____	<input type="checkbox"/>	Wall Coverings	# _____
<input type="checkbox"/>	Stairwells	# _____	<input type="checkbox"/>	Laundry Equipment	# _____	<input type="checkbox"/>	Furniture	# _____
<input type="checkbox"/>	Kitchen Appliances	# _____	<input type="checkbox"/>	Fans	# _____	<input type="checkbox"/>	Gym Equipment	# _____
<input type="checkbox"/>	Water Conditioning	# _____	<input type="checkbox"/>	Entry System	# _____	<input type="checkbox"/>	Boilers	# _____
<input type="checkbox"/>	Motors	# _____	<input type="checkbox"/>	Cooling Towers	# _____	<input type="checkbox"/>	Hot Water Heaters	# _____
<input type="checkbox"/>	Exhaust Fans	# _____	<input type="checkbox"/>	Chillers	# _____			
<input type="checkbox"/>	Other	# _____	Description _____					

**8 Grounds Common Area Detail**

<input type="checkbox"/>	Asphalt/Parking	# _____	<input type="checkbox"/>	Lighting	# _____	<input type="checkbox"/>	Mail Boxes	# _____
<input type="checkbox"/>	Trash Enclosures	# _____	<input type="checkbox"/>	Monuments/Signs	# _____	<input type="checkbox"/>	Security Cameras	# _____
<input type="checkbox"/>	Fences	# _____	<input type="checkbox"/>	Gate Operators	# _____	<input type="checkbox"/>	Roads/Asphalt	# _____ (miles)
<input type="checkbox"/>	Site Wall	# _____	<input type="checkbox"/>	Gates	# _____	<input type="checkbox"/>	Landscape/Irrigation	# _____
<input type="checkbox"/>	Other	# _____	Description _____					

**9 Site Amenities & Equipment**

<input type="checkbox"/>	Tennis Court	# _____	<input type="checkbox"/>	Swimming Pool	# _____	<input type="checkbox"/>	Shuffleboard Court	# _____
<input type="checkbox"/>	Kiddie Pool	# _____	<input type="checkbox"/>	Spa	# _____	<input type="checkbox"/>	Tot Lot	# _____
<input type="checkbox"/>	Bocce Ball Court	# _____	<input type="checkbox"/>	Basketball Court	# _____	<input type="checkbox"/>	Water Features	# _____
<input type="checkbox"/>	Docks/Boat Slips	# _____	<input type="checkbox"/>	BBQ Area	# _____	<input type="checkbox"/>	Cabanas	# _____
<input type="checkbox"/>	Lakes/Ponds	# _____	<input type="checkbox"/>	Vehicles	# _____	<input type="checkbox"/>	Playgrounds	# _____
<input type="checkbox"/>	Parks	# _____	<input type="checkbox"/>	Gazebos	# _____	<input type="checkbox"/>	Pumps	# _____
<input type="checkbox"/>	Landscape Equip.	# _____	<input type="checkbox"/>	Tools	# _____	<input type="checkbox"/>	Tanks	# _____
<input type="checkbox"/>	Other	# _____	Description _____					

Timeshare Interior	Unit Type/Name	Quantity	# of Bedrooms	# of Bathrooms	Square Feet	Description

**Documents Available**

- Annual Budget
- CC&R's (maintenance responsibility section only)
- Site Map
- Building Plans
- Existing Reserve Study
- California Form DRE 623

	Yes	No