

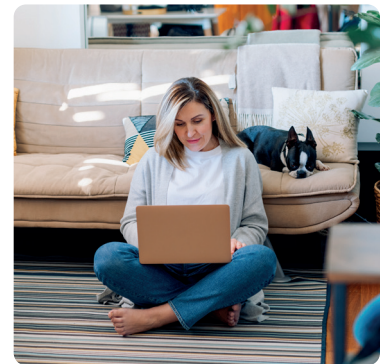


## Outsourced HOA Compliance

Managing single-family rental (SFR) properties within homeowner associations (HOAs) can be complex and demanding. Outsourcing HOA compliance offers numerous benefits, including mitigating financial and legal risks, ensuring adherence to HOA rules, leveraging technology, and allowing investors to focus on core activities.

Effective SFR property management requires tailored strategies to navigate the unique dynamics of HOAs, including maintenance oversight, community engagement, timely fee payments, and prompt violation handling. Ryan offers a white-glove, cost-effective HOA compliance outsourcing service using the latest technology. We are also the largest property tax services practice in North America with over 65 offices across the United States and are capable of providing property tax support as part of our service. Our expertise across multiple jurisdictions enables SFR investors to focus their resources and attention on core business activities that directly contribute to their competitive advantage and strategic objectives.

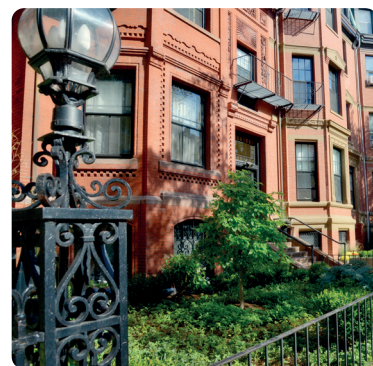
### *Enjoy the Benefits of Outsourcing to Overcome HOA Hurdles*



### ***Efficient HOA Violation Management and Resolution: Intake, Tracking, and Escalation***

Effectively managing HOA violations is crucial for maintaining community standards and protecting property values. Ensuring that every violation is addressed promptly and accurately helps prevent issues from escalating and contributes to a well-maintained, harmonious community. Our service is designed to simplify and enhance this process, providing a comprehensive solution that covers every step from the initial retrieval of violations to their ultimate resolution. By leveraging our streamlined approach, we ensure that each violation is handled efficiently, with clear communication and consistent follow-up, leading to timely and satisfactory outcomes for all parties involved.

- ▶ **Violation Retrieval:** Ryan will expertly manage the receipt and retrieval of all HOA violations for the properties under our care. This ensures that no violation is overlooked and every issue is addressed promptly.
- ▶ **Issue Ticket System:** Once a violation is logged, an issue ticket will be generated and assigned to Client Operations. This structured approach guarantees that each violation is tracked and resolved in a timely manner.
- ▶ **Tracking and Reporting:** Clients will benefit from our detailed tracking and reporting tools, which provide real-time access to the status of each ticket. This transparency allows clients to stay informed and monitor the progress of each issue.
- ▶ **Dashboard Metrics:** Our comprehensive dashboard offers customized metrics and reporting tailored to your portfolio. This feature provides valuable insights and helps in assessing the overall management of HOA violations effectively.



### ***Comprehensive Database Repository for HOAs***

A comprehensive database repository of HOAs is essential for managing and accessing key information about community governance and property management. This repository serves as a centralized hub for all relevant data concerning HOAs, providing valuable insights and streamlining administrative processes. It encompasses the creation and registration of HOAs at the property level, maintains a detailed record of documents and communications, and includes critical data points such as audit and payment histories. By mapping Covenants, Conditions, and Restrictions (CCRs) for each development, this repository ensures transparency and supports effective management and compliance. This database includes:

#### ***HOA Creation at the Property Level***

The repository tracks the establishment of HOAs at the property level, documenting the formation process and initial setup. This includes capturing details about the HOA's charter, its governance structure, and the legal framework under which it operates. Accurate records of HOA creation are crucial for ensuring that all community regulations and management practices are properly documented from the outset.

### **Registration with HOAs**

Once an HOA is created, it must be registered with relevant local and state authorities. The repository maintains a record of this registration, including submission details and confirmation receipts. This registration process is vital for the HOA's legal recognition and operational legitimacy, ensuring that the association meets all regulatory requirements.

### **Digital Copies of Documents**

The database includes digital copies of essential HOA documents such as bylaws, meeting minutes, and amendment records. These documents are crucial for transparency and serve as a reference for current and future board members, homeowners, and legal entities. Ensuring that these documents are readily accessible helps maintain the integrity and continuity of HOA governance.

### **Contact Information**

Up-to-date contact information for HOA officers, board members, and management personnel is stored in the repository. This feature facilitates efficient communication between the HOA and homeowners and with external parties such as contractors and legal advisors. Accurate contact details are essential for addressing concerns, coordinating meetings, and managing day-to-day operations.

### **Audit History**

The repository tracks the audit history of each HOA, including past audits, findings, and resolutions. This audit trail is important for maintaining financial transparency and accountability, providing a record of compliance with financial regulations and internal controls. Regular audits help ensure that the HOA operates within legal and financial boundaries.

### **Payment History**

Detailed records of payment transactions related to HOA dues, assessments, and other financial obligations are maintained. This payment history is crucial for managing the HOA's budget, tracking financial contributions, and ensuring that all transactions are properly recorded and accounted for.

### **CCRs Mapped for Each Development**

Covenants, Conditions, and Restrictions (CCRs) are mapped for each development within the repository. This mapping provides a clear understanding of the rules and regulations governing each community, helping homeowners and HOA board members to ensure compliance and resolve disputes. Mapping CCRs aids in the enforcement of community standards and supports the overall management of property and community relations.



## ***Streamlining Financial Management for Real Estate Properties: Payment Processing and Tracking***

The Payment Processing and Tracking module in PropertyPoint® offers a robust solution for managing various financial obligations associated with real estate properties. This system ensures the timely execution of scheduled payments on a monthly, quarterly, or annual basis, guaranteeing that all financial commitments are consistently met. Additionally, it simplifies the management of payments for violations and liens, reducing administrative burdens. By maintaining detailed records of all transactions, PropertyPoint provides valuable historical data for comprehensive financial reporting. The customizable reporting dashboard further enhances financial oversight, allowing users to generate tailored monthly reports that support informed decision-making.

- **Scheduled Payments:** The PropertyPoint system facilitates the execution of payments required on a monthly, quarterly, or annual basis, ensuring all financial obligations are met on time.
- **Violation and Lien Payments:** This module efficiently handles payments for any violations and liens, simplifying the management of these additional financial responsibilities.
- **Historical Payment Tracking:** PropertyPoint maintains detailed records of all payment transactions, providing valuable historical data for comprehensive financial reporting.
- **Customizable Reporting Dashboard:** Users benefit from a customizable dashboard that offers monthly reporting tailored to specific needs, enhancing financial oversight and decision-making.



### ***Quarterly Audit:***

#### ***Ensuring Accuracy and Compliance in Property Management***

The Quarterly Audit process is essential for maintaining accuracy and compliance in property management. This comprehensive review ensures that all financial transactions and property details are thoroughly examined and updated. By proactively communicating with HOA companies and maintaining essential access information, the Quarterly Audit helps ensure that all properties are managed effectively and that tenants have the necessary access to common areas and amenities. This diligent approach helps property managers stay ahead of any changes and maintain the highest standards of management and compliance.

- Review payment clearing history monthly ensures no payments go uncleared.
- Full audit of all properties ensures current and proper HOA information is collected and maintained.
- Proactively contact all HOA companies quarterly to ensure no management company or rules details have changed.
- Maintain common area passwords and codes for tenant details for each property to include gate access and amenity access.

### Title Clearance: Ensuring Clean and Clear Property Ownership



Title clearance is a crucial component of property management, dedicated to ensuring that ownership records remain accurate and free of encumbrances. This process is essential for preventing legal issues or disputes that could impact the property's value or ownership status. By proactively addressing potential title concerns, property managers uphold the property's legal integrity and safeguard the owner's interests. This diligent approach helps maintain the property's value and ensures its smooth transferability.

- ▶ Regular title clearance checks ensure accurate and unblemished ownership records.
- ▶ Address any title disputes or issues that may arise, protecting the property's legal standing.

Outsourcing HOA management for SFR properties through Ryan can significantly alleviate community governance complexities. Our expert, technology-driven services address financial and legal challenges while ensuring HOA compliance. With a focus on violation management, database efficiency, financial oversight, and meticulous title clearance, Ryan enhances operational effectiveness. This empowers SFR investors to direct their efforts toward core activities, confident that their HOA needs are expertly managed. By choosing Ryan's services, investors can overcome challenges and optimize their property investments with enhanced efficiency and expertise.



#### Award-Winning Tax Services

For additional information

1.855.RYAN.TAX

[ryan.com](https://ryan.com)