



Sample Transition Process

	HOMEOWNERS	AAM	BOARD OF DIRECTORS	PRIOR MANAGEMENT
30-45 days before start		AAM will request data transfer from prior management firm.		Receive and comply with the transition request from AAM.
25 days before contract start		Send the "Next Steps" email and AAC & IRS forms for electronic signature. Open the Association's new bank account(s)	Review "Next Steps" email and provide requested information. Board President will review and electronically sign ACC and IRS forms via DocuSign.	Send AAM Start Up Funds from Association operating account. First data transfer
20 days before contract start		Develop the "Welcome Email" and "Welcome Letter" for homeowners. Send homeowners the "Welcome Email" and Welcome Letter".	Review and approve "Welcome Email" and "Welcome Letter" for homeowners.	
15 days before contract start	Will receive "Welcome Email" from AAM. Will receive "Welcome Letter" via USPS.	Set up Association on AAM platforms. Introduce the AAM Management team that will work with Association.	Schedule the first board meeting with AAM Assist AAM Management team with questions or data required for transition.	
5 days before contract start	Login into All Access homeowner portal and set up payment information.	Inform vendors of transition and assist with setting up in our AP software for timely invoice processing.		
1st day of Management	Make first assessment payment.	Update ACC statutory agent and IRS representative. Assist in Agenda development and schedule common area and compliance inspections.		Provide AAM with data from any new homeowners since the last data transfer. Transfer remaining Association funds and close out former Bank Accounts.
First 30 days after start	Attend first HOA Board Meeting with AAM	Deposit remaining Association funds in new bank accounts.	Hold the first board meeting with AAM.	Second data transfer. Provide homeowner ledgers and outstanding invoices. Deliver any physical Association documents.