

The logo for AMS, consisting of the letters 'AMS' in a large, bold, blue serif font.

HOMEOWNER ASSOCIATIONS  
CONDOMINIUMS | HIGH-RISES  
DEVELOPER SERVICES

Association  
Management  
Services NW

*A Division of The Management Group, Inc.*

A decorative graphic consisting of two overlapping curved lines, one in a light green color and one in a teal color, creating a wave-like effect.

PORTLAND • VANCOUVER • TRI-CITIES • SALEM  
CENTRAL OREGON • OREGON COAST

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# THE AMS DIFFERENCE



As the Northwest's leader in homeowner association management, we are dedicated to providing the best return on your homeowner association's investment, and to make sure your residents see that value every time they come home. AMS is committed to forming positive, solution-oriented partnerships with the communities and boards we serve through communication, education, accurate financial reporting, and full accountability.

Several important factors make AMS stand out from the competition:

- **The Management Team.** You will have the full support of the AMS team. From our executive leadership team to our administrative and accounting teams, we are proud of our experience, expertise, and level of service we provide to homeowners. AMS' staff love what they do, and it shows in their tenure with AMS and the pleasure with which they serve their communities and boards. Our team utilizes a proactive style of management, planning ahead for issues instead of just reacting to them as they happen.
- Each association's management team includes:
  - ◆ *Association Business Manager*
  - ◆ *Association Administrator*
  - ◆ *Staff Accountant*
  - ◆ *Member Services Coordinator*
  - ◆ *Collection Team*
  - ◆ *Insurance Team*
  - ◆ *Maintenance/Chief Building Engineer*
- **Board Education.** Education for board members is a priority at AMS. Our company presents monthly board education classes, held in both AMS' Oregon and Washington office locations. These well-attended, complimentary classes include guest speakers with specific expertise relevant to community associations and provide a venue for directors to meet and share experiences.
- **Fundamentals.** Association Business Managers are expected to understand Oregon and/or Washington laws, revised statutes and code, as well as monitor new legislation, tax rulings and other civil code requirements pertaining to HOAs. Interpretation of these laws and statutes is often challenging, and therefore managers have access to legal counsel to assist them in interpretation.

I look forward to working with you, discussing your association's needs and goals, and helping you achieve them.

*Michelle Underwood*

PRESIDENT  
AMS | Association Management Services NW



**MORE SERVICE**  
**MORE SUPPORT**  
**MORE EXPERIENCE**

## ABOUT AMS

AMS | Association Management Services NW is the top HOA management company in the Pacific Northwest. We provide full-service management to condominium, single family, and high-rise communities throughout Oregon and Washington. In business since 1985, we have developed an effective style of management that has resulted in long-lasting relationships with the clients we serve. Our management plans can be fully customized to the needs of your community. We also offer developer services for new communities setting up an HOA for the first time, capital improvement project management, and a unique Neighborhood Enhancement Program to monitor compliance. AMS is committed to education of our staff and the boards we serve, offering free ongoing board member education.

### THE TMG FAMILY OF COMPANIES

AMS | Association Management Services NW  
TMG Property Management Services NW  
TMG Multifamily  
TMG Commercial

TMG Sales  
TMG Maintenance Services NW  
Home Works Home Repair Services  
TMG Cares

# 1985

YEAR FOUNDED

# 300

EMPLOYEES

# 313

ASSOCIATIONS

**AMS IS THE ONLY MANAGEMENT COMPANY  
HOLDING THE AAMC AND AMO ACCREDITATIONS  
IN BOTH WASHINGTON AND OREGON**

An AAMC designation represents a commitment to professionalism, education and excellence. It requires the senior manager to hold a PCAM designation, and at least 50% of managers to hold PCAM, AMS, or CMCA credentials.

**AAMC**<sup>®</sup>

Accredited Association  
Management Company

**AMO**<sup>®</sup>

[AMS-NW.COM](http://AMS-NW.COM)



# SCOPE OF SERVICES

Your homeowner association management company is not simply a service provider, but is often the face of your community and the voice of its residents. Our knowledgeable and dedicated staff bring together their collective experience to enhance and strengthen your community.

## HOA MANAGEMENT SERVICES

AMS works as partners with your board of directors and homeowners to preserve and protect the community and take care of the details that go into maintaining the value of your investment.

### COMMUNITY SERVICES

- Staffing
- Emergencies
- Member services
- Communication
- Database
- Architectural requests
- Board meetings
- Mailings
- Website
- Recordkeeping

### PROPERTY MANAGEMENT

- Meeting attendance
- Document preparation
- Site inspections
- Landscape walks
- Compliance
- Architectural requests
- Reserve studies
- Risk management
- Statutory compliance
- Board education

### FINANCIAL MANAGEMENT

- Accounting practices
- Assessment collection
- Reporting
- Reserve accounts
- Accounts payable
- Annual budget
- Special assessments
- Taxes
- Tax preparation and audits
- Accounting support

### ONLINE SERVICES

- Owner access
- Access to documents
- Community notices
- Calendar
- Board member access

### PROPERTY MAINTENANCE

- Maintenance plans
- Amenities and common areas
- Vendor management
- Coordinate repairs



# 4 TRANSITION PERIOD

During the initial set-up period of the Association, we provide the following services, in which all fees are covered under the proposed set-up fee (i.e., portal setup, vendor changes, etc.).

## DOCUMENTATION

- Review of governing documents.
- Review of contracts, resolutions, budgets, and implementation.
- Insurance review.
- Set up bank accounts, Federal Tax ID number, and EIN as required.
- Establish owner database.

## PLANNING & BUDGETING

- Review and facilitate any necessary changes to resolutions, rules and regulations, and community forms.
- Overview of operating budget based on information supplied by the board.
- Facilitate initial preparation of a reserve study or assist with an annual update.
- Establish a Building Maintenance Plan and Annual Work Calendar.

## COMMUNICATIONS

- Welcome letter to all owners.
- Hire, train, and supervise on-site staff.
- Meet and greet with the board of community.



# TESTIMONIALS

*AMS has been really responsive to our needs, and that has made a huge difference because our previous management firms were not as helpful, skillful, and well-organized. AMS has taken care of the issues in an efficient way. We don't have to explain things more than once, which is a big benefit given our past experience. And they've actually been fun to work with. I would highly recommend AMS. We've had a really good experience with them.*

## **Rob Branding, Multnomah Cityside Condominiums**

*At AMS, they stay on top of everything. They're always able to meet our needs and they're very respectful of all the homeowners. They just do a genuinely good job. The biggest benefit is that I don't have to deal with a lot of the minute details. The homeowners can call AMS if they have any questions. They also have access online to all the documents they need. If it hadn't been for AMS, I don't know where we would have been. I highly recommend them.*

## **John Moats, West Park Community HOA**

*AMS really has everything that we're looking for. Their ability to be a full-service management group and their organizational skills work really well with what we're looking to do as a board. Whatever really services the community, they have those resources already built in, and it just feels like they really care for the communities.*

**Gail Garland, Highlands at Progress Ridge**

*After several years of horrible service from another management company, our HOA contracted with AMS. [Our manager] immediately grabbed the bull by the horns and helped us put our affairs in order. While doing that, she put systems in place that allow us to effortlessly take care of not only the day-to-day operations of our community, but to effectively respond to immediate needs. She is very responsive and patient with our board in helping us keep our community on track. She handles complaints and impatient homeowners professionally and courteously and makes decisions based on the rules of our HOA. As president of the HOA, a staff member is always available to me for consultation. We truly appreciate AMS for helping us maintain our community!*

**Patrick Hess, Pacific Crossing**

*AMS' services have helped guide our board in how we can be the best stewards of the community that we're managing. Michelle Underwood was good enough to come out and work with us, and she was able to bring on someone who just fit with our board. That was huge for us, and it's been so smooth since then. I've been just thrilled with our manager. She is so accessible. She's available when I need her. We're pretty happy with what we have.*

**Linda Everett, East Village at Orenco Station**

*It is the peace of mind that we get. It's the communication. It's the trust, that I have as a homeowner and that I have as a board member knowing that our concerns are being taken seriously. No matter how small or how big, every concern is treated equally, and I appreciate that. We expect professionalism. We expect highly-trained community managers. At AMS, we have all of that. AMS is there pulling for us and advocating for us, and that's what's important.*

**Ann Kopyy, Village Condominiums**

# 06

## FAQS

### ABOUT AMS

**1 How long have you managed community associations?** AMS has been managing community associations in Washington since 1988 and in Oregon since 1997.

**2 What insurance does AMS carry?** AMS has a Fidelity Policy in the amount of \$1 million per occurrence. This coverage extends to any fraudulent actions by AMS staff and thereby covers financial losses incurred by contracted clients. We also carry a Forgery or Alteration policy, as well as a Computer/Cyber Crime policy.

**3 What software system do you use for property management?** We utilize an HOA management software system called Caliber. This system is utilized by both administrative and accounting team members.

### ASSOCIATION BUSINESS MANAGERS

**4 How long have your team members managed community associations?** Our Association Business Managers have management experience ranging from three to sixteen years.

**5 What is your manager-to-property ratio?** The average manager portfolio covers 8-14 properties depending on the size, scope of contract, and length of time managed by AMS.

**6 How do you assign a manager to our account?** AMS considers the needs of the community and a manager's ability to transition a new property into his or her portfolio. AMS attempts to choose a manager whose personality melds well with a particular board and its membership.

**7 If our assigned manager is out of the office, will we receive the same level of service until their return?**

If a manager is unavailable, a team member familiar with the HOA will respond to any needs or issues. The service level you receive will not waver; if necessary, a member of the Executive Team will gladly step in to help.

**8 What is the turnover for property managers?** Turnover for managers at AMS is low by industry standards. The average tenure in our organization is seven years for Association Business Managers. Many managers have been with the company for ten years or more. We have historically attracted qualified, skilled managers to our team. AMS maintains a strong and experienced management team by promoting from within.

**9 What is the property manager's involvement with the Association's Reserve Study?** The Manager works collectively with the Board and the Reserve Study Analyst to identify and ensure all components are included. The Manager provides all the financial information and past maintenance costs to the Analyst as needed. It is also the Manager's responsibility to initialize the service for Board review for any upcoming budget seasons.

## MANAGEMENT SERVICES

**10 How do you handle site visits?** Site visits are typically completed monthly. The Association Business Manager will walk or drive the community and do a visual inspection, looking for maintenance, landscape, and any other issues. This allows the manager to stay on top of the community's needs and address them proactively. A site inspection is not the same as a compliance inspection – however, they can be performed at the same time. Site visits vary by contract. Time for site visits would be applied to the number of contracted management hours.

**11 What are communication options for owners?** Owners can call or email us anytime with questions and maintenance requests by using our general phone numbers and emails, or by contacting the team members directly. AMS has a 24-hour return communication policy. Since we work as a team, a knowledgeable individual is always available to provide help. If owners are unsure of who their team is, they can find the information in the portal: [ams-nw.com/portal](https://ams-nw.com/portal).

**12 What are the assessment payment options for owners?** Owners can set up one-time or recurring payments by ACH or credit card on the community portal. Or, if they prefer, they may pay by check or set up automatic payments through their bank.

## TRANSITIONS

**13 How will you handle the management transition and transfer of records if we decide to use your services? How will we access historical records?** AMS has a timeline request for documents which is sent to the current management company upon signing of the Management Contract. AMS staff will then begin working through documents received and meet with the board or a designee of the board to obtain basic day-to-day processing information, review current resolutions, contracts, etc.

## EXPERIENCE

**14 Can you provide examples of your experience with large capital projects?** AMS has had extensive experience with everything from targeted repairs to full rehab projects with costs ranging from \$500,000 to \$6.5 million. We utilize third-party building engineers to ensure costs are competitive and experience is relevant to the project. Let us know if you would like more detailed information or references.

**15 Can you provide examples of your experience with master loans and serial monthly special assessments, including prepayments of serial monthly assessments?** Our accounting department takes a hands-on approach with loans and special assessments. We provide monthly detailed reconciliations of all expenses of the project and revenues billed and received from the owners. We also monitor your paydowns and provide options for re-amortizations and/or refinancing to keep the loan payments in line with your special assessment revenue. Since these types of loans can last 10-20 years and board members can change multiple times throughout the project, our accounting team does a quarterly check-in with the board to ensure their understanding of the information.

## COSTS

**16 How do you help maintain/decrease costs?** First, AMS reviews all documents after the transition—CC&Rs, Bylaws, Reserve Study, budget, and insurance to determine uniformity and ensure the community functions optimally. We evaluate all contracts and expenses, looking for potential savings based on scale or relationships. This analysis addresses issues proactively rather than reactively. For example, identifying and implementing necessary annual maintenance can extend the life of components, allowing cost savings for replacements over time. Additionally, we have established relationships with trusted, vetted vendors that offer preferred pricing.

**17 What services are included in a management contract?** Most HOAs fit into one of three categories of management service contracts listed below. However, your contract can be fully customized to the specific needs of your community.

- ◆ **All-Inclusive.** This contract does not track time spent on included services, such as phone calls, emails, meetings, site visits, compliance, etc. The only services that are billed under this contract are for those not listed in the contract.
- ◆ **Hourly Contract.** This plan includes a pre-determined allotment of hours based on the needs of your association. If you are consistently using all of your allotted hours, you can renegotiate your contract to allow for more. All time is tracked outside of accounting service. If the association utilizes more hours than stated in the contract, an additional hourly charge applies.
- ◆ **Accounting/Accounting Plus.** Perfect for associations who just need accounting services, this plan provides accounts payable/receivable, monthly financials, assessment billing and collection, and annual reports.

## ACCOUNTING/FINANCIALS

**18 Do you have a CPA on staff?** CPA services are outsourced. Accountants are required to have a Bachelor's Degree in their field and specific experience requirements. Our Chief Financial Officer has been with AMS since 1990.

**19 When can the association expect to receive financial statements?** Financial statement and accompanying data are compiled and completed by our staff accounts at Washington and Oregon locations by your assigned Staff Accountant. Financials are completed by the 20th of the month through the "Board Room" section of the community's portal.

## VENDORS

**20 Can we continue to use our current vendors?** Yes. All communities AMS manages may keep relationships with current vendors. We do require that all vendors be vetted to ensure that they are properly licensed, bonded, and insured. We utilize a third-party processing company, NetVendor, to screen background, licensing, and insurance requirements. Requiring vendors are credentialed and covered is an industry best practice and adds an additional layer of protection for the board and the community.

**21 Can we retain our banking relationship with Columbia Bank, Umpqua Bank, US Bank, Mutual of Omaha, etc.?** All HOAs can retain their current banking relationship for their reserve accounts. AMS utilizes Alliance Bank for day-to-day operations. The Board has the ability to retain relationships with other banks in addition to Alliance. AMS has associations with multiple bank accounts at all banks listed.

# 07

## FEATURED COMMUNITIES

Highlighted here are just a few of the associations we manage throughout Oregon and Washington.



# 08

## CONTACT



**MICHELLE UNDERWOOD**  
President



**MICHELLE RICHARDSON-BLUE**  
Associate Vice President  
Business Development Operations



**SANDEE ENBYSK**  
New Business  
Transition Manager

**888.485.9676**

**HOAteam@ams-nw.com**

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