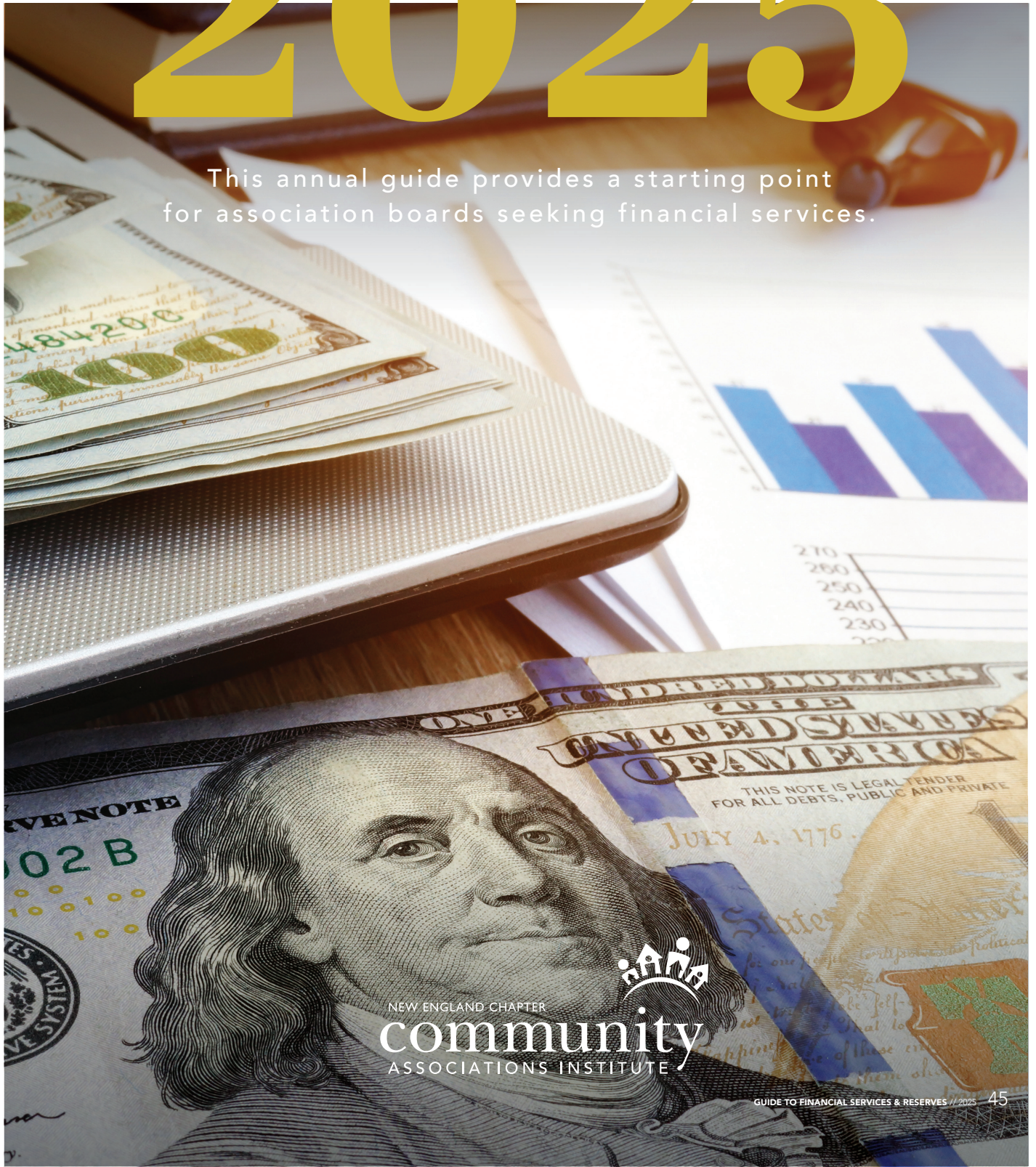




## ***GUIDE TO FINANCIAL SERVICES & RESERVES***

# 2025

This annual guide provides a starting point  
for association boards seeking financial services.



2025 CAI-NE

# Guide to Financial Services & Reserves

This annual guide provides a starting point for association boards seeking financial services.

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## PROVIDE SERVICES IN THE FOLLOWING NEW ENGLAND STATES

MAINE	●		●	●		●			●	●	●		●		●	
MASSACHUSETTS	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
NEW HAMPSHIRE	●		●	●	●	●		●	●	●	●	●	●	●	●	
RHODE ISLAND	●		●	●	●	●		●	●	●	●	●	●	●		●
VERMONT	●		●	●		●	●		●	●	●		●			

## ACCOUNTING SERVICES

AUDIT & REVIEW SERVICES		●	●	●							●	●			●	
TAX PREPARATION & PLANNING		●	●	●							●	●			●	
ASSOCIATION BORROWING	●	●		●				●			●				●	
OPERATING BUDGETING		●		●		●		●			●				●	
LITIGATION SUPPORT		●		●			●	●			●					
RESERVE ANALYSIS			●	●			●	●	●		●					
DEVELOPER TRANSITIONS		●	●	●		●	●	●			●	●			●	
TRANSITIONS IN MANAGEMENT		●	●	●		●		●			●	●			●	

## BOOKKEEPING / FINANCIAL REPORTING

MONTHLY FINANCIAL STATEMENTS		●				●		●			●					
MONTHLY FEE COLLECTION		●				●		●								
BUDGET REPORTS		●				●		●			●					
COLLECTION & DELINQUENCY STATEMENTS		●				●		●								

## LENDING

ASSOCIATION LENDING	●	●			●					●	●			●		●
BANKING SERVICES	●	●			●					●				●		●
CERTIFICATES OF DEPOSIT	●	●			●					●				●		●
DIGITAL PAYMENT SOLUTIONS	●	●			●	●		●		●				●		●
FANNIE MAE / FREDDIE MAC PREPARATION		●														

## RESERVE STUDIES

ON-SITE INSPECTION						●		●								
PROPERTY SPECIFIC RECOMMENDATIONS						●		●								
RESERVE REPORTING SOFTWARE								●				●				

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