



2026 GUIDE TO FINANCIAL SERVICES & RESERVES

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



2026 CAI-NE

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CAI MEMBER	●	●	●	●	●	●	●	●	●	●	●	●
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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* Information provided by advertisers as of 5/15/26

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