



PROFESSIONAL CONDOMINIUM MANAGEMENT



SORENSEN Homes and Condo Management , INC.

2930 Del Prado Boulevard, S
Suite B
Cape Coral, FL 33904

Phone: 239-540-7447

Fax: 239-540-4077

Email: Cathy@SorensonRealtyInc.com

Toll Free: 800-540-7026



PERSONAL AND PROFESSIONAL INFORMATION

 **SORENSEN**
HOMES & CONDO MANAGEMENT, INC.
2930 Del Prado Blvd, S
Suite B
Cape Coral, FL 33904



Prepared by Cathy J. Sorenson, REALTOR®, CAM, EPro

The accuracy of all information is deemed reliable, but is not guaranteed.

PERSONAL AND PROFESSIONAL INFORMATION



Dear Officers and Directors

I appreciate the opportunity to present my company and my Condominium Management Department to you.

Association living is a unique concept. It asks residents to contract with each other to live under a set of particular rules and shared amenities. My goal as your managers is to work as a liaison between all of the owners to achieve harmony and quiet enjoyment for each owner.

Laws governing the association change daily with each price of legislation enacted by the multiple tiers of government from the federal branch to local city ordinances regulating housing, corporations and licensing. Laws change in the legislature, in the courts or through various governmental agencies. I keep you informed as to how these changes affect your real property rights.

After Hurricane Charley ravaged our area, insurance has become a key concern for condominiums. It is important to stay up to date on the insurance changes and to continuously monitor the policies to be sure that you have adequate coverage and competitive pricing.

Your decision to hire a professional condominium manager is a good decision. However, your choice of managers is important. Without property training and guidance or an accurate awareness of the law, those who run or live under the association can end up getting involved in unnecessary disputes and frustrating legal or financial battles.

The following pages are designed to familiarize you with my services and abilities.

I understand that you are the association and the association is you!

Thank you again for this opportunity. Please call me to schedule a time when we can meet.

Sincerely,

Cathy J. Sorenson, CAM, EPro
REALTOR®



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PERSONAL AND PROFESSIONAL INFORMATION



CATHY J. SORENSON

AFFILIATION

SORENSON REALTY, INC.
2930 DEL PRADO BOULEVARD, S
SUITE B
CAPE CORAL, FL 33904
OFFICE: 239-540-7447
FAX: 239-540-4077
VOICE MAIL: 239-540-5845



EXPERIENCE

1979—PRESENT INDEPENDENT REAL ESTATE PROFESSIONAL
1982—REAL ESTATE BROKER SINCE
1983—REALTOR® ASSOCIATION OF THE YEAR
1985—REALTOR® OF THE YEAR
1991—PRESIDENT, CAPE CORAL ASSOCIATION OF REALTORS®
1992—DISTRICT VICE PRESIDENT, FLORIDA ASSOCIATION OF REALTORS®
1999—DESIGNATED REALTOR® OF THE YEAR
1999—PRESIDENT, CAPE CORAL ASSOCIATION OF REALTORS®
2004—DESIGNATED REALTOR® OF THE YEAR
1994—PRESENT MEDIATOR FOR CAPE CORAL ASSOCIATION OF REALTORS®
2004—PRESENT PROFESSIONAL STANDARD CHAIRMAN FOR CAPE CORAL ASSOCIATION OF REALTORS®

PROFESSIONAL ASSOCIATIONS

MEMBER—CAPE CORAL ASSOCIATION OF REALTORS®
MEMBER—REALTOR® ASSOCIATION OF GREATER FORT MYERS AND THE BEACH MULTIPLE LISTING SERVICE
MEMBER—MLS ALLIANCE
MEMBER—FLORIDA ASSOCIATION OF REALTORS®
MEMBER—NATIONAL ASSOCIATION OF REALTORS®
MEMBER—CAPE CORAL CONSTRUCTION INDUSTRY ASSOCIATION

SERVICE

CROSSPOINT CHRISTIAN CHURCH
LEE MEMORIAL HOSPITAL FOCUS GROUP
I-75 TRAFFIC FOCUS GROUP
RONALD MCDONALD CHARITIES

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Our Company

We have been conducting business in the local area for many years. We have and continue to work hard to gain the respect of these many distinguished communities. This recognition is built upon a respect for our clients and neighbors. We hope your experience with us will further this reputation of personalized service and client satisfaction.

Our company is comprised of licensed real estate agents who live and work in the surrounding communities. We have personal knowledge of each neighborhood's nature, and growing possibilities. Based on this we hope to find the perfect fit for you and your family. Every community is different. Whether your focus is schools, shopping, transportation, or recreational facilities, our associates will draw upon their knowledge of the local areas to find the ideal property to meet your needs.

We supplement this high-touch philosophy, with a high tech edge. We have quick access to local MLS computes and software to help us analyze local market condition.

If you are one the growing number of real estate investors, our commercial division is more than capable to provide our clients with commercial and income property opportunities.

Our best asset is our people. Our dedicated and talented staff of professionals will make every effort to make sure your transaction goes as smoothly as possible.

We understand that we need to earn your business. We hope the level of detail found within this Comparative Market Analysis helps you with your decision making process. We want to do as much as possible to give you the information you need to price and market your most valuable asset—your home.



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PROFESSIONAL PLEDGE

SORENSEN REALTY, INC. is committed to developing an office of real estate professionals that will

- Demonstrate moral integrity and competent service to both clients and customers.
- Dedicate themselves to the public interest and welfare.
- Become the standard in real estate service by which all others are measured.

SORENSEN REALTY, INC.

services

CAPE CORAL—NORTH FORT MYERS—FORT MYERS—LEHIGH ACRES—SAN CARLOS—FORT MYERS BEACH—PINE ISLAND—MATLACHA

A Full Service Real Estate Office

RESIDENTIAL SALES

INVESTMENT

CONDOMINIUM MANAGEMENT

HUD/VA PROPERTIES

NEW HOME SALES

PROPERTY MANAGEMENT

COMMERCIAL



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MY SERVICES

 **SORENSEN**
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MY SERVICES



PROFESSIONAL CONDOMINIUM MANAGEMENT SERVICES

SORENSEN HOMES AND CONDO MANAGEMENT, INC. WILL

- MAKE ROUTINE MAINTENANCE CHECKS OF THE PROPERTY
- COORDINATE ROUTINE MAINTENANCE
- COORDINATE REPAIRS AND INSPECT THE WORK WHEN COMPLETED
- PURSUE COLLECTIONS INCLUDING NECESSARY FILING OF LIENS FOR MONEY OWED TO THE ASSOCIATION
- PREPARE AND MAINTAIN ANNUAL BUDGETS
- COORDINATE ANNUAL AND SPECIAL MEETINGS
- KEEP ALL RECORDS
- FILE NECESSARY TAX AND CORPORATION REPORTS
- COORDINATE WITH TITLE COMPANIES, ATTORNEYS, AND REALTORS ON UNIT SALES
- MAINTAIN AND UP-TO-DATE LIST OF ALL UNIT OWNERS
- OTHER TASKS AS REQUIRED BY THE OFFICERS AND DIRECTORS



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ATTRIBUTES OF A GOOD MANAGER

1. Recognizes broad implications of issues
2. Analyze an issue or problem from various points of view
3. Understands complex concepts from various points of view
4. Makes decisions, though unpopular, that are legally, financially or morally correct
5. Makes decisions in the face of uncertainty
6. Involves the entire board on important matters
7. Makes sound decisions based on substantial review and research of the issue
8. Is willing to entertain a new approach or consider new ideas
9. Follows up on an issue raised, whether at a meeting or in a chance conversation with an owner
10. Is a good scheduler, planner and deadline organizer
11. Is willing to hear all sides to an issue or debate
12. Able to settle or control conflicts and not be an instigator
13. Takes a firm stand and resolves problems
14. Acts ethically
15. Acts decisively
16. Motivates others to take action
17. Has the trust and confidence of others
18. Sets an agenda and clearly identifies the priorities
19. Does not allow meeting to get out of control
20. Works well under pressure
21. Doesn't take matters personally
22. Can deal well with conflict and adversity
23. Acts and speaks openly and honestly
24. Treats others with the respect he or she wants to be treated with
25. Makes everyone feel welcome and secure.



MY SERVICES



ATTRIBUTES OF A GOOD MANAGER,^{CONT}

26. Pursue additional educational and training
27. Integrates planning
28. Provides clear direction for the board
29. Perseveres and persists in the face of challenges and obstacles
30. Doesn't say one thing and then does another
31. Weighs the actions of the present with the consequences of the future
32. Places a priority on getting results
33. Does not misappropriate funds
34. Is available outside of meetings, either by phone, mail or scheduled appointments
35. Keeps an open mind and does not pre-judge others
36. Shares information and expertise
37. Manages through consensus decision making
38. Actively pursues collaborative problem solving
39. Appears friendly and approachable and makes others feel comfortable
40. Seems organized and in control
41. Creates committees to research an issue
42. Seeks out specific solutions and does not constantly postpone or delay action
43. Treats every issue on the agenda as being important. Stresses each item deserves through investigation and decision
44. Allows for residential to gripe and blow steam, but then focuses on curing the problem
45. Knows when to end debate
46. Runs the meetings free of distractions or frequent interruptions
47. Ability to accept others.



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GOOD NEIGHBOR POLICY

1. Good neighbors do not create noise in, near or around their home that can be disturbingly heard by the neighbors.
2. Good neighbors do not let garbage pile up.
3. A good neighbor communicates with the other neighbor should a problem or conflict arise, rather than going straight to the police or courts.
4. All good neighbors will watch out for each other
5. Good neighbors shouldn't make a pest of themselves
6. Pets can break up good neighbors
7. Good neighbors don't fight with their fists to resolve verbal arguments
8. Good neighbors don't snitch on each other to the association.
9. Good neighbors will ask if the other needs help with anything.
10. Good neighbors become good friends
11. Making the place beautiful is the trait of a good neighbor
12. Good neighbors respect the privacy of others
13. Good neighbors will volunteer their time and resources to serve the association
14. Good neighbors will seek election to the board, rather than leave the board with less qualified people
15. Good neighbors will attend association meetings
16. Good neighbors educate their children and guests of the association rules.





MY REPORTS

SORENSEN
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***YOUR CONDOMINIUM
ASSOCIATION, INC.***



ANNUAL MEETING

2007

Notice of Annual Meeting

To the owners of Your Condominium, a Florida Corporation:

An annual meeting of owners will be held as follows:

Date - March 22, 2007

Time - 6:30 P.M.

Place - Sorenson Realty, Inc.,
2930 Del Prado Blvd. S. Suite B, Cape Coral, FL 33904

Purposes -

Determine Quorum

Call to Order

Proof of Notice of Meeting

Reading and disposal of any unapproved minutes

Financial Report for Current Year

Discussion of Next Years Budget

Reserves

Surplus

Audit

Election of Directors

Old Business

New Business

Adjournment

To transact any other business that properly comes before the meeting.

Dated: January 24, 2007

By: Cathy J. Sorenson
Management for the Association

Your Condominium Association ANNUAL MEETING

January 16, 2007

CALL TO ORDER

Association President Your President called the meeting to order at 4:10 PM

MEMBERS PRESENT

Your members present

MEMBERS PRESENT BY PROXY

Your proxies

OTHERS PRESENT

Cathy J. Sorenson, Association Management

APPROVAL OF THE MINUTES

A motion was duly made and seconded to dispense with the reading of the minutes. Motion carried.

A motion was duly mader and seconded to accept the minutes of the March 8, 2006 Annual Membership Meeting, March 8, BOD Meeting, April 19, 2006 BOD Meeting, April 20, 2006 BD Meeting, October 10, 2006 BOD Meeting, November 6, 2006 BOD Meeting, and the December 4, 2006 Special Meeting as presented. Motion carried.

TREASURER'S REPORT

The 2006 Net Worth Report, and Spending Report were reviewed.

BUDGET

A motion was duly made and seconded to accept the proposed budget with the increase in maintenance fees to \$0.00 of the 2 bedroom units and \$0.00 on the 3 bedroom units. Increase shall be effective April 1, 2007. Motion carried.

RESERVES

A motion was duly made and seconded to fund the reserves. Motion failed

SURPLUS

A motion was duly made and seconded to roll the surplus funds at the end of 2006 into the operating account. Motion carried.

RESERVES

A motion was duly made and seconded to fund the reserves. Motion failed

SURPLUS

A motion was duly made and seconded to roll the surplus funds at the end of 2006 into the operating account. Motion carried.

AUDIT

A motion was duly made and seconded to waive a professional audit. Motion carried.

A motion was duly made and seconded to establish an audit team of 3 to audit the 2006 financial records. Motion carried.

The team appointed as an audit team is your members

ELECTION OF OFFICERS

An Election Verification committee consisting of Association Secretary, , member, and Cathy J. Sorenson, Association Management was appointed to count the ballots.

Meeting was called to recess while votes were tallied.

Meeting was called back to order by President

President read the results of the election as follows:
Your new officers

OLD BUSINESS

Your old business

NEW BUSINESS

Your new business

ADJOURNMENT

There being no further business the meeting was adjourned at 6:50 PM

Submitted by:

Sorenson Realty, Inc.

President

Expenses	2006 BUDGET		ACTUAL		PROPOSED	
Bank Charges	-	120	-	76	-	75
Inspections		65		155.29		175
Insurance		6000		15005.37		15,600
Flood	1200		1266		1300	
General	4800		11490		12000	
Liability			2249.37		2,300	
Lawn Care		3000		2505		2700
Licenses and Filing Fees		36		221.25		225
Maintenance		1000		672.76		1000
Management Fee		2155		2155		2155
Contracted Fee	1980		1980		1980	
Postage	100		100		100	
Office	75		75		75	
Pest Control		634		546		600
Pool Service		1440		399.75		1300
Contracted Service	1440				1000	
Repairs					300	
Repairs		500		7963.63		500
Reserve Funding		2700		2700		2700
Utilities		9200		10430.81		11500
Electric	1100		1702.67		2000	
Garbage & Recycling	1800		3085.28		3500	
Water	6300		5642.86		6000	
OPERATING EXPENSE		26850		42830.86		38,530
TOTAL EXPENSES		26850		42830.86		38,530

	<u>Per Unit</u>	<u>Per Month</u>	<u>Annual Income</u>
INCOME (Current)	400	3600	43,200.00

Your CONDOMINIUM ASSOCIATION

In order to facilitate consideration of my application for the tenancy of a condominium unit in this condominium, I affirm that the following information concerning my family and me is true. I consent that you may make further inquiry concerning my background.

Please Print

NAME OF APPLICANT _____ AGE _____

NAME OF SPOUSE _____ AGE _____

CURRENT ADDRESS _____

CITY _____ STATE _____ ZIP _____

HOME PHONE _____ CELL _____

EMAIL: _____

PREVIOUS ADDRESS (include less than 5 years) _____

CITY _____ STATE _____ ZIP _____

PRESENT OCCUPATION _____

NAME OF CHILDREN _____ AGE _____

_____ AGE _____

_____ AGE _____

NAMES OF ALL INDIVIDUALS WHO WILL OCCUPY CONDO UNIT

_____ AGE _____

_____ AGE _____

_____ AGE _____

_____ AGE _____

TYPES OF VEHICLES _____ LICENSE NUMBER _____ LICENSE NUMBER _____

We agree to observe and abide by the rules and regulations of the Your Condominium Association.

Signature of applicant _____

Signature of applicant _____

Date Submitted _____

Please do not write below this line)

APPROVED BY Your CONDOMINIUM ASSOCIATION

_____ TITLE _____

Signature of Officer or Management

RETURN COMPLETED FORM AND A CHECK IN THE AMOUNT OF \$75.00 MADE PAYABLE TO SORENSON HOMES AND CONDO MANAGEMENT, INC. AT LEAST 15 DAYS PRIOR TO CLOSING DATE.

SORENSON HOMES AND CONDO MANAGEMENT, INC.

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