

# Community Management Proposal for Board of Directors

September 28, 2025

Smith  
& Co.

## Smith&Company

**PREPARED FOR: NEIGHBORHOOD HOA -  
MRS. GINA DAVIS, OPERATIONS  
MANAGER**

940-999-9999  
Smith&Company@gmail.com  
Linked in: @Smith&Company

"This document is confidential and intended solely for the use of Neighborhood HOA"

# Table of Contents

Executive Summary.....	I
Client Needs.....	2
Proposed Solution.....	3
Timeline/ Deliverables.....	4
Pricing/ Investment.....	5
Case Studies/ Testimonials.....	6
About Us/ Team.....	7
Closing/ CTA.....	8



# Executive Summary

## WHY PARTNER WITH SMITH & COMPANY?

Here at Smith&Company, we prioritize a personal approach to all of your property management needs. If your company requires property management, our expertise will be the thing that impresses. Here, our clients matter, and if they chose to work with us, they deserve and will receive, the best quality results through our team of talented individuals. Smith&Company prioritizes maintenance, governance compliance, financial management, and resident communication. In our proposal we will go over our plan to implement these property management skills into the Neighborhood HOA world.

## TIMELINE:

The first month of implementation will consist of the first weeks dedication to the initial meeting, so we understand client needs/can discuss the implementation of proposal and site visits. Week two we will go over the proposal and ensure our proposal matches the needs of the HOA, and make any necessary amendments. Week three, we will start the implementation process of our proposed plan for Neighborhood HOA. For additional services, once a month, we will hold board meetings, starting week four, and hold cite inspections, once a month by management, and twice a month for compliance.

## MONTHLY BUDGET:

- Budgeting & Financial Reports-\$150
- Resident Communication-----\$83
- Vendor Management-----\$56
- Billing Collection System----- \$100
- Monthly Management Fee-----\$400

Monthly Management Fee Total: \$789

## OUR TEAM:

The hardworking people of the Smith&Company team welcomes you. With the aid of our Chief Executive Officer-Chris Patterson, the Operations Manager-Gina Davis, our Chief Operating Officer, Client Relations & Growth- Mitch Reynolds, and the Business Development Manager-Matthew Barnes, Smith&Company ensures your services to be well managed.



# Neighborhood HOA



## NEIGHBORHOOD HOA

The 200 homes that make up the Neighborhood community rely on their HOA to maintain the gated entrance to ensure their safety remains in good hands, to provide the landscaping and lawn care in all of Neighborhood's common areas, and for upkeep of the central park and dog area so that there is always space to foster the community spirit.



## BOARD OF DIRECTORS

You work hard to make sure that the residents of Neighborhood are satisfied within this community. You manage the community's budget, collect dues, ensure noise limits and other rules are followed, maintain property values, and hire the landscapers and security that keep the community's space flourishing.



## PROPERTY MANAGEMENT

The services of a property management company could help the volunteers of the HOA Board manage day-to-day operations. Tasks such as collecting dues and paying bills, coordinating maintenance, vendors, and service contracts, ensuring neighborhood rules are followed, and communicating directly with residents can all run smoothly with the assistance of professional community managers.



---

THE PROPERTY MANAGEMENT  
SERVICES OF

# Smith & Company

## ABOUT SMITH & COMPANY

At Smith & Company, we don't just see ourselves as community managers, but as true partners dedicated to enhancing the lifestyle experience of every resident in your community. From financial management to maintenance, common area oversight, governance compliance, management, and community event planning, our comprehensive range of services is designed to help you.

## OUR APPROACH

Smith & Company has an unwavering commitment to exceptional service and transparent communication. No two communities are alike, so we value taking a personalized approach to our community management.

We look forward to engaging the HOA Board in a dialogue to better understand the unique vision, goals, and needs of your community. Our aim is not just to meet your needs but to surpass them, ensuring that every resident feels a true sense of belonging and pride in their community.

## SCOPE OF SERVICES

Smith & Company specializes in maintenance, governance compliance, financial management, and resident communication. We will manage vendors and service contracts for landscaping, security, and maintenance and repairs and facilitate communication between the members of the Board and those vendors and service providers. Our resident portal and payment system makes communication with residents and the collection of dues a seamless, stress-free process.



# Project Timeline



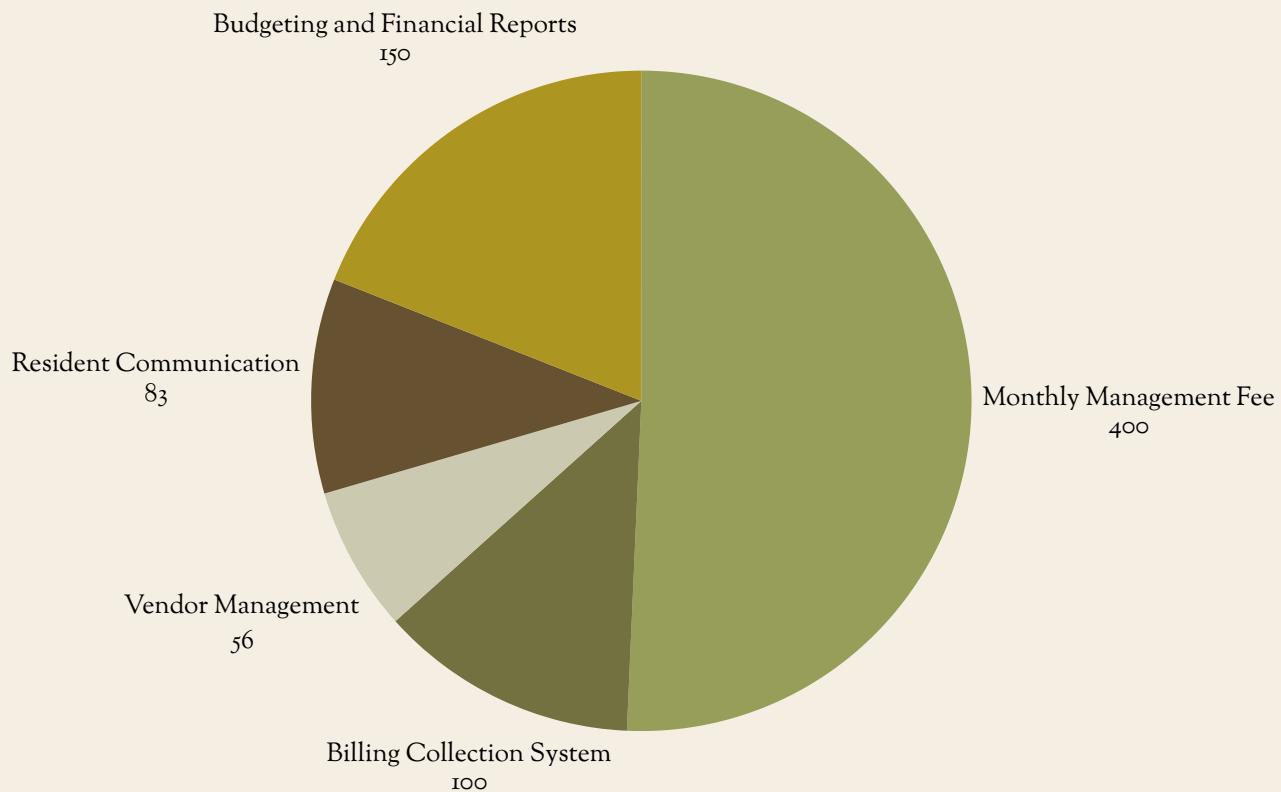
Phase	Deliverables	Timeline
Initial Meeting	Understand client needs and discuss implementation of proposal.	Week 1
Site Visit	On-site visit so our team better understands the operations and layout of your property.	Week 1
Proposal Review	Ensure our proposal matches the needs of the HOA, and make any necessary amendments.	Week 2
Implementation	Execution of approved plan.	Week 3
Board Meetings	Attend board meetings and re-evaluate project success.	Once Monthly, beginning Week 4
Site Inspections	Once a month by management, twice a month for compliance.	Weeks 2 & 4, occurring monthly

This timeline provides a timeline for the first month of implementing our proposal. After the initial month, we will continue to have recurring board meetings and site inspections monthly.

# Pricing

## MONTHLY MANAGEMENT FEE: \$789

Here at Smith & Company we understand the importance of flexibility, and to that end, do not require long-term commitment—we want you to be happy with the services we provide, so we offer a unique monthly renewal payment structure. Below you will find a breakdown of that monthly fee. Additionally, our agreement is not set in stone, and can be negotiated on a monthly basis. Our goal is to tailor our services to align perfectly with your community's unique requirements. We are committed to transparency and open communication and look forward to discussing any aspects of the proposed agreement to better meet your needs. Monthly board meetings will serve as an optimal time for us to evaluate the efficacy of the proposal on a monthly basis.



# What Our Clients Say

Every neighborhood has its own character, and we're proud to help each one thrive. Here's what some of our partner communities have to say about working with Smith & Company.

“Smith & Company transformed the way our board operates. Their clear financial reporting and proactive communication have given us complete confidence in our community’s management.”

— Lisa R., Board President, Willow Creek Subdivision (Single-Family HOA)

“The team at Smith & Company responds quickly and always follows through. Whether it’s a roof repair in our condo building or a compliance question, we know we’re in good hands.”

— Mark T., HOA Treasurer, Parkview Condominiums

“Working with Smith & Company has taken the stress off our board. They not only handle the day-to-day details, but also bring creative ideas like community events that improve our residents’ experience.”

— Angela S., Board Secretary, Lakeside Master-Planned Community

“What stands out most is their personal touch. We never feel like just another account — they genuinely care about our gated neighborhood and the people who live here.”

— David L., Board Vice President, Oak Hollow Estates (Gated Community)

“Since partnering with Smith & Company, our finances are organized, transparent, and easy for every board member to understand — something we had struggled with for years.”

— Katherine M., Board Member, Riverbend Townhomes



# Our team



Chris Patterson — Chief Executive Officer

Chris Patterson brings more than 20 years of leadership experience in community association management. As CEO, he sets the strategic vision for Smith & Company and ensures our services consistently meet the highest standards. Chris is passionate about building strong client relationships and believes every community deserves individualized attention and care.



Gina Davis — Operations Manager

With over two decades of experience in association management, Gina has built her career from the ground up. As COO, she oversees day-to-day operations and ensures that our clients receive responsive, reliable support. Known for her dedication and collaborative leadership, Gina is committed to helping every community thrive.



Mitch Reynolds – Chief Operating Officer, Client Relations & Growth

Mitch has more than 15 years of experience in community management, operations, and client services. At Smith & Company, he leads initiatives that strengthen client relationships and drive organizational success. With a background in both operations and business development, Mitch brings a balanced perspective that keeps communities running smoothly.



Matthew Barnes – Business Development Manager

Matthew focuses on building strong partnerships between Smith & Company and the communities we serve. He connects HOA boards with the resources and professionals best suited to meet their unique needs. Matthew takes pride in tailoring solutions that reflect the character and goals of each neighborhood.



Christina Smith — Director of Community Management

Christina Smith specializes in community operations with expertise in construction, maintenance, and association leadership. She works closely with boards and managers to address evolving community needs and implement practical, forward-thinking solutions. Christina values transparent communication and problem-solving that builds trust with every board she serves.

# Talk to us for further support.

By partnering with Smith & Company, the HOA Board can trust us with the following:

## Community Maintenance

We will manage vendors and service contracts for landscaping, security, and maintenance & repairs in order to keep the community's space flourishing.

## Financial management

Our resident portal and payment system makes communication with residents and the collection of dues a seamless, stress-free process.

## Transparent Communication

We value taking a personalized approach to our community management. We look forward to working with the HOA Board to meet the unique vision, goals, and needs of your community

At Smith & Company, we understand that each community has its own unique needs. We would be honored to partner with the members of the HOA Board so that we can all work together to meet those needs and enhance the lifestyle experience of every resident of the Neighborhood community.



