

**lms lieberman management services**

## **Information Request Report**

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**Prepared for Community**

**THE DANA POINT CONDOMINIUM ASSOCIATION**

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**Reporting Period**

**December 2012**

**Issue Date**

**1/2/2013**

# Community THE DANA POINT CONDOMINIUM ASSOCIATION

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Name: Reva Hackin      Request #: 0554-FALZ93ERY4      Status: Completed  
Address: 1405 E Central Rd 120C Arlington Hghts, IL 60005      Date Entered: 12/28/2012      Received By: Fabiola Alvarez  
Type of Request: Account Information

**Description:**  
Homeowner Mr is calling for his account information for he is yet to receive his account information

**Resolution:**  
Advised owner his account information

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Name: Concetta Humbert      Request #: 0554-MBUR93EKXS      Status: Completed  
Address: 1405 E Central Rd 121C Arlington Hghts, IL 60005      Date Entered: 12/28/2012      Received By: Maureen Butcher  
Type of Request: Coupon Book Request;Account Information

**Description:**  
Helen called to find out when she will receive her coupon book.

**Resolution:**  
I advised her that the coupon book was not mailed yet because we don't take over the property until January 1.

I gave her the assessment amount for 2013 and offered to give her the address to mail her payment but she stated she will not mail until she has a book.

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Name: Dawn Berngen      Request #: 0554-LNEL93DQP8      Status: Completed  
Address: 1405 E Central Rd 212B Arlington Hghts, IL 60005      Date Entered: 12/27/2012      Received By: Latoya Neal  
Type of Request: Account Information

**Description:**  
Owners son Dan calling to ask if the POA is needed as he handles the account.  
(616) 994-8122

**Resolution:**  
Confirmed this would be needed

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Name: Robert Willey      Request #: 0554-BHOD933PPM      Status: Completed  
Address: 1405 E Central Rd 217C Arlington Hghts, IL 60005      Date Entered: 12/17/2012      Received By: Beverly Hood  
Type of Request: e-Debit

**Description:**  
Owner Mr. calling to inquire if he needs to send 2 voided checks or just one for the E-Debit application.

**Resolution:**  
Advised owner he only needs to send one voided check with the E-Debit application.

## Community THE DANA POINT CONDOMINIUM ASSOCIATION

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Name: Larry Dellefield      Request #: 0554-MBUR934LGN      Status: Completed  
Address: 1415 E Central Rd 113B Arlington Hghts, IL 60005      Date Entered: 12/18/2012      Received By: Maureen Butcher  
Type of Request: Coupon Book Request

**Description:**  
Larry called to find out when he will receive his coupon book for 2013.

**Resolution:**  
I advised him that he should have his coupon book by the end of year once information is updated.

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Name: Deborah Ballin      Request #: 0554-ATHL936LYW      Status: Completed  
Address: 1415 E Central Rd 118C Arlington Hghts, IL 60005      Date Entered: 12/20/2012      Received By: Alex Thervil  
Type of Request: Account Information

**Description:**  
Owner states that LMS is taking over her association starting 2013. WOULD like to know her account number and assessment amount.

**Resolution:**  
Provided owner with account information

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Name: John McCarthy      Request #: 0554-BHOD935NNG      Status: Completed  
Address: 1415 E Central Rd 203A Arlington Hghts, IL 60005      Date Entered: 12/19/2012      Received By: Beverly Hood  
Type of Request: e-Debit;e-STAR

**Description:**  
Owner Mr. calling to inquire about the mailing address to send E-Debit form. Owner inquired about the website address for E-Star and registration number.

**Resolution:**  
Advised owner of the mailing address to send E-Debit form.  
Advised owner of the website address and registration number for E-Star.

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Name: Beverly Baron      Request #: 0554-KVGR935PCB      Status: Completed  
Address: 1415 E Central Rd 307A Arlington Hghts, IL 60005      Date Entered: 12/19/2012      Received By: Kasandra Von Gl  
Type of Request: Other

**Description:**  
Owner Mrs calling to see if the e-mail address is correct.

**Resolution:**  
Advised of the e-mail address for services

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Name: Ellen Zethmayr      Request #: 0554-SPEY93CL9W      Status: Completed  
Address: 1415 E Central Rd 321C Arlington Hghts, IL 60005      Date Entered: 12/26/2012      Received By: Sandra Penway  
Type of Request: Address Change Request

**Description:**  
Ms Zethmayr requesting the coupon book when mailed be mailed to:  
413 8th Avenue  
La Grange IL 60525  
The unit is empty no tenant

**Resolution:**  
Advised Ms Zethmayr we will change her account to reflect the address she requested.  
UPDATE 12-26-12 Changed mailing address. LK

# Community THE DANA POINT CONDOMINIUM ASSOCIATION

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Name: Marie Miller      Request #: 0554-SBOA93CMSA      Status: Completed  
Address: 1415 E Central Rd 422C Arlington Hghts, IL 60005      Date Entered: 12/26/2012      Received By: Socorro Bocanegr  
Type of Request: Account Information;HO - Association Correspondence  
  
**Description:**  
Owner Ms calling for payment information as she is out of town  
mariemiller395@msn.com

**Resolution:**  
Sent the initial mailing and a ledger

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Name: Marie Miller      Request #: 0554-KVGR93CTYA      Status: Completed  
Address: 1415 E Central Rd 422C Arlington Hghts, IL 60005      Date Entered: 12/26/2012      Received By: Kasandra Von Gl  
Type of Request: Address Change Request;Coupon Book Request  
  
**Description:**  
Owner MRs calling to see if the coupon book was sent out.  
  
Mailing address would be the unit.

**Resolution:**  
Advised that the mailing address would be changed. Advised that the coupons would be sent out when we take control of the property.  
UPDATE 12-27-12 Changed mailing address LK

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Name: Richard Kluchenek      Request #: 0554-BHOD93CL7X      Status: Completed  
Address: 1505 E Central Rd 308A Arlington Hghts, IL 60005      Date Entered: 12/26/2012      Received By: Beverly Hood  
Type of Request: Account Information;Forwarded to Property Manager;Outbound Call  
  
**Description:**  
Owner Mr. calling regarding the storage charge on his account. Owner stated he paid his storage charge for the year until August 2013. Owner stated the coupon book has the storage charge on it. Owner stated he checked with the onsite office and was informed the storage is paid until August 2013. Owner stated he would like a new coupon book.

**Resolution:**  
Advised owner this information would be forwarded to PM for review and advisement.

Outbound 3:29pm: LM Advised owner per PM to continue to pay regular assessments for now until account is uploaded.

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Name: Richard Kluchenek      Request #: 0554-SPEY93DKNN      Status: Completed  
Address: 1505 E Central Rd 308A Arlington Hghts, IL 60005      Date Entered: 12/27/2012      Received By: Sandra Penway  
Type of Request: Account Information  
  
**Description:**  
Mr Kluchenek requesting clarification of the phone message he received yesterday from RS Agent BH. He would like to confirm the amount of his monthly assessment.

**Resolution:**  
Provided Mr Kluchenek the information as stated on the Occupant Ledger.

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<u>Name:</u> Dawn Pett	<u>Request #:</u> 0554-ABOO93DL73	<u>Status:</u> Completed
<u>Address:</u> 1515 E Central Rd 118C Arlington Hghts, IL 60005	<u>Date Entered:</u> 12/27/2012	<u>Received By:</u> Angie Botello
<b>Description:</b> Dawn calling to state that she has not yet received her 2013 coupon book. Owner states she would like to know how she is supposed to send her monthly assessment payment if she has no payment information.		<b>Type of Request:</b> Account Information;Coupon Book Request;Lockbox Address Requested
<b>Resolution:</b> Advised owner that coupon books have been sent and she should be receiving them soon. Advised Dawn of account number and lock box address, and advised she can send the check by itself with that information.		
<u>Name:</u> Julie Ramion	<u>Request #:</u> 0554-SBOA93CQMW	<u>Status:</u> Completed
<u>Address:</u> 1515 E Central Rd 218C Arlington Hghts, IL 60005	<u>Date Entered:</u> 12/26/2012	<u>Received By:</u> Socorro Bocanegr
<b>Description:</b> Owner Ms calling, received the initial mailing, is calling for status of the coupon book or to obtain her payment information		<b>Type of Request:</b> Account Information;Lockbox Address Requested
<b>Resolution:</b> advised of the payment information, account and amount, advised books should be sent soon.		
<u>Name:</u> Howard Mirsky	<u>Request #:</u> 0554-JBYE933NLB	<u>Status:</u> Completed
<u>Address:</u> 1515 E Central Rd 253A Arlington Hghts, IL 60005	<u>Date Entered:</u> 12/17/2012	<u>Received By:</u> Jackie Byrne
<b>Description:</b> Owner is calling to say that he'd like to know when he's getting his coupon book. Owner has his bank generate his payment for him to his mgmnt company (PSI). He wants to know if he can do that with us. Owner asked me to "Mail" him a letter saying what our lockbox address, his account number, assessment amount, due date of and grace period date is. He said that he doesn't want me to email or fax him that info. He wants it mailed to him. Owner said that he'll do that.		<b>Type of Request:</b> Account Information;Coupon Book Request
<b>Resolution:</b> I advised owner that he'll get a coupon book in the next couple of weeks. I advised owner that can have his bank send us the payment just like he does now. I advised owner that I can give him our lockbox address and account number ( acct # is noted on the ledger) I advised owner that I don't know what the assessment amount is as we haven't loaded in all the info from their mgmnt company.		
 <b>Resolution:</b> I called owner back to advise him that there's nothing I can really mail him right now as we don't even know what the monthly assessment amount or if it will be going up for 2013. I advised owner to give us a call after Jan 1 and we should be able to provide him any acct information that he needs once we have everything loaded.		
<u>Name:</u> Michelle Puscas	<u>Request #:</u> 0554-SPOY93EKWD	<u>Status:</u> Completed
<u>Address:</u> 1515 E Central Rd 256A Arlington Hghts, IL 60005	<u>Date Entered:</u> 12/28/2012	<u>Received By:</u> Susan Potkay
<b>Description:</b> Owner Mrs 847-515-8369 advises coupon book has not been received. Owner advises will mail January payment.		<b>Type of Request:</b> Account Information
<b>Resolution:</b> Provided Owner with assessment amount, account number, and lockbox address to manually send payment for January.		

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Name: Nadine Lewis      Request #: 0554-CBRT93CQZW      Status: Completed  
Address: 1515 E Central Rd 263B Arlington Hghts, IL 60005      Date Entered: 12/26/2012      Received By: Cheri Brandt  
Type of Request: Insurance Information

**Description:**

Owner, Nadine Lewis is calling because she received a request for a COI.

847-364-5427

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Name: Nancy Balis      Request #: 0554-LTEE93CRC2      Status: Open  
Address: 1515 E Central Rd 265B Arlington Hghts, IL 60005      Date Entered: 12/26/2012      Received By: Liz Teague  
Type of Request: Account Information

**Description:**

Owner calling about Edebit and Info. form. Gave fax number.

**Resolution:**

Gave owner fax #

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Name: Robert Bartuch      Request #: 0554-CBRT933P2Q      Status: Completed  
Address: 1515 E Central Rd 318C Arlington Hghts, IL 60005      Date Entered: 12/17/2012      Received By: Cheri Brandt  
Type of Request: Other

**Description:**

Owner calling to get EGV Office Address.

**Resolution:**

Provided owner with EGV Office Address.

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Name: Kiyohiko Shirataki      Request #: 0554-LNEL93CNAX      Status: Completed  
Address: 1515 E Central Rd 321C Arlington Hghts, IL 60005      Date Entered: 12/26/2012      Received By: Latoya Neal  
Type of Request: Account Information;e-Debit

**Description:**

**Resolution:**

**Community THE DANA POINT CONDOMINIUM ASSOCIATION**

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Sent to AS and MH

RE: 1515 E. Central Road, #321C --Dana Point

To whom it may concern:

Attached please find the contact and emergency info sheet and e-debit application.

Our All State insurance agent has sent you a copy of the certificate of the insurance a few day ago by e-mail.

If you have not receive our certificate of insurance or any question, please contact me by e-mail or call me at 847-508-9001.

Thank you.

--  
Kiyo Shirataki

847-508-9001 (Cell)

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<u>Name:</u>	Kiyohiko Shirataki	<u>Request #:</u>	0554-FALZ93CNZB	<u>Status:</u>	Completed			
<u>Address:</u>	1515 E Central Rd 321C Arlington Hghts, IL 60005	<u>Date Entered:</u>	12/26/2012	<u>Received By:</u>	Fabiola Alvarez			
		<u>Type of Request:</u>	General Property Info					
<b>Description:</b>								
Homeowner Mr 847-508-9001 is calling to advise he is yet to receive any information about his account.	<b>Resolution:</b> Advised owner the management company will be sending statements shortly. Advised owner there are two months in transition and will not receive a late fee on his account.							

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<u>Name:</u>	Christopher McCarthy	<u>Request #:</u>	0554-MBUR93EL6W	<u>Status:</u>	Completed			
<u>Address:</u>	1515 E Central Rd 455A Arlington Hghts, IL 60005	<u>Date Entered:</u>	12/28/2012	<u>Received By:</u>	Maureen Butcher			
		<u>Type of Request:</u>	Coupon Book Request					
<b>Description:</b>								
Christopher called to find out when he will receive his coupon book.	<b>Resolution:</b> I advised him that we don't take over the property until January 1st and once the information is updated the coupon will be mailed.							
	 I confirmed the amount that the assessment will be and when a late fee is assessed.							

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<u>Name:</u>	William Sheridan	<u>Request #:</u>	0554-SPEY93L3Z	<u>Status:</u>	Completed			
<u>Address:</u>	1605 E Central Rd 201A Arlington Hghts, IL 60005	<u>Date Entered:</u>	12/17/2012	<u>Received By:</u>	Sandra Penway			
		<u>Type of Request:</u>	Account Information;e-Debit					
<b>Description:</b>								
Mr Sheridan inquiring how to make payment for January 2013 and if he could send in the application for the E Debit program as he would like to participate.	<b>Resolution:</b> Advised Mr Sheridan how to submit January assessment and the EGV office address for the E Debit form.							

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<u>Name:</u> Pauline Keyes	<u>Request #:</u> 0554-MBUR934KZE	<u>Status:</u> Completed
<u>Address:</u> 1605 E Central Rd 207A Arlington Hghts, IL 60005	<u>Date Entered:</u> 12/18/2012	<u>Received By:</u> Maureen Butcher
<u>Type of Request:</u> Insurance Information		
<b>Description:</b> Tammy who is with Kaiser Insurance Agency called to find out if the Association has to be named if no existing mortgage on the property.		
<b>Resolution:</b> I called the onsite office and confirmed with Patricia the onsite that it would not be necessary.		
The Insurance company will fax a copy of policy to Resident Servcies today.		
<u>Name:</u> Andrea Pacer	<u>Request #:</u> 0554-BHOD936USC	<u>Status:</u> Completed
<u>Address:</u> 1605 E Central Rd 210B Arlington Hghts, IL 60005	<u>Date Entered:</u> 12/20/2012	<u>Received By:</u> Beverly Hood
<u>Type of Request:</u> e-Debit;Account Information		
<b>Description:</b> Owner calling to inquire about account number for E-Debit application.		
<b>Resolution:</b> Advised owner of the account number to complete her E-Debit application.		
<u>Name:</u> Helen Doyle	<u>Request #:</u> 0554-SBOA935MGL	<u>Status:</u> Completed
<u>Address:</u> 1605 E Central Rd 221C Arlington Hghts, IL 60005	<u>Date Entered:</u> 12/19/2012	<u>Received By:</u> Socorro Bocanegr
<u>Type of Request:</u> Account Information		
<b>Description:</b> Owner Ms calling for the account number to reference on her payment, she can not wait for the coupon book to arrive, she is leaving town.		
<b>Resolution:</b> advised		
<u>Name:</u> Rosann Casella	<u>Request #:</u> 0554-FALZ937RKV	<u>Status:</u> Completed
<u>Address:</u> 1605 E Central Rd 322C Arlington Hghts, IL 60005	<u>Date Entered:</u> 12/21/2012	<u>Received By:</u> Fabiola Alvarez
<u>Type of Request:</u> Welcome Package Sent		
<b>Description:</b> Owner is requesting a new welcome packet for the new management company to be sent to her work address, however does not want to use this address for any further correspondence.		
<b>Resolution:</b> FWD TO LK		
2020 Lunt Ave Elk Grove Village, IL 60007		

## Community THE DANA POINT CONDOMINIUM ASSOCIATION

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Name: Eldred Hudson      Request #: 0554-ABOO93CNHF      Status: Completed  
Address: 1605 E Central Rd 406A Arlington Hghts, IL 60005      Date Entered: 12/26/2012      Received By: Angie Botello  
Type of Request: Account Information;e-Debit

**Description:**

Owner, Mrs., calling to state that she has not received her coupon book yet and would like to know where she can send her monthly payment. Owner states she also signed up for edebit and would like to make sure when that will take affect so she does not double pay.

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Name: Eldred Hudson      Request #: 0554-ATHL93DMN9      Status: Completed  
Address: 1605 E Central Rd 406A Arlington Hghts, IL 60005      Date Entered: 12/27/2012      Received By: Alex Thervil  
Type of Request: Account Information

**Description:**

Owner would like to know if she is on e-debit yet and what her account number will be. New LMS property 1/2013

**Resolution:**

Advised owner of lock box address. Advised owner of monthly assessment amount. Advised owner that edebit will not take place in January and will most likely take place in February.

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Name: Raymond Fredrich      Request #: 0554-SPEY93CMAH      Status: Completed  
Address: 1605 E Central Rd 421C Arlington Hghts, IL 60005      Date Entered: 12/26/2012      Received By: Sandra Penway  
Type of Request: Account Information;Lockbox Address Requested

**Description:**

Ms Fredrich rather upset over not receiving her coupon book.

**Resolution:**

Provided Ms Fredrich the information so she may submit payment.

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Name: Rene Van Someren      Request #: 0554-KVGR93CM49      Status: Completed  
Address: 1605 E Central Rd 422C Arlington Hghts, IL 60005      Date Entered: 12/26/2012      Received By: Kasandra Von Gl  
Type of Request: Account Information

**Description:**

Owner MR calling to get the account number for the checks for payment

**Resolution:**

Advised of the account number

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Name: Sheryl Dammier      Request #: 0554-KVGR933JX7      Status: Completed  
Address: 1615 E Central Rd 106A Arlington Hghts, IL 60005      Date Entered: 12/17/2012      Received By: Kasandra Von Gl  
Type of Request: Directions

**Description:**

Owner MR calling to get directions or LMS corporate office.,

**Resolution:**

Advised of the locations of the LMS office.

# Community THE DANA POINT CONDOMINIUM ASSOCIATION

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Name: Dean Bartello                    Request #: 0554-SPEY93EMMZ    Status: Completed  
Address: 1615 E Central Rd 115B Arlington Hghts, IL 60005            Date Entered: 12/28/2012            Received By: Sandra Penway  
Type of Request: Account Information;e-Debit

**Description:**

Janette ( assistant to Mr Bartello) inquiring if the old management company will terminate the automatic payment and to advise they are completing the new E Debit form.

**Resolution:**

Advised Janette the old company will be stopping the deduction and if she feels the need she may contact them and confirmed the enrollment time frame for E Debit and they will be submitting checks until notified via letter confirming E Debit is in place.

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Name: Steven Seng                    Request #: 0554-BHOD93CP6Q    Status: Completed  
Address: 1615 E Central Rd 122C Arlington Hghts, IL 60005            Date Entered: 12/26/2012            Received By: Beverly Hood  
Type of Request: Account Information;Forwarded to Property Manager;Outbound Call

**Description:**

Owner Mr. calling regarding the fee on the storage units. Owner stated he paid the storage unit fee for the year already.

**Resolution:**

Advised owner this information would be forwarded to PM for review and advisement.

Outbound 3:27pm: Advised owner per PM to pay regular assessments for now until the account is uploaded.

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Name: Raymond Fredrich                    Request #: 0554-SPEY93CMCJ    Status: Completed  
Address: 1615 E Central Rd 304A Arlington Hghts, IL 60005            Date Entered: 12/26/2012            Received By: Sandra Penway  
Type of Request: Account Information;Lockbox Address Requested

**Description:**

Ms Fredrich requesting the amount due monthly for 2013 and the lock box address

**Resolution:**

Provided Ms Fredrich the information

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Name: Jacqueline Fouch                    Request #: 0554-SBOA936NUY    Status: Completed  
Address: 1615 E Central Rd 309B Arlington Hghts, IL 60005            Date Entered: 12/20/2012            Received By: Socorro Bocanegr  
Type of Request: e-Debit Application Status;Census

**Description:**

Owner Ms calling to confirm her email was received, she sent the census form and edebit application

**Resolution:**

advised it was received as a edebit welcome letter has been sent to her

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Name: Daniel Sinard                    Request #: 0554-MBUR93EPVG    Status: Completed  
Address: 1615 E Central Rd 310B Arlington Hghts, IL 60005            Date Entered: 12/28/2012            Received By: Maureen Butcher  
Type of Request: Account Information

**Description:**

Dan called to find out when he will receive his coupon book and what his assesment payment will be for 2013.

**Resolution:**

I emailed him the address of where to send his payment and the amount due.

**Community THE DANA POINT CONDOMINIUM ASSOCIATION**

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Name: Chester Diolanti      Request #: 0554-ABOO933MKM      Status: Completed  
Address: 1615 E Central Rd 401A Arlington Hghts, IL 60005      Date Entered: 12/17/2012      Received By: Angie Botello  
Type of Request: e-Debit;Insurance Information;Walk Ins

**Description:**

WALK IN- Chester came in to drop off edebit form, voided check, contact and emergency form, and copy of homeowners insurance.

**Resolution:**

Reviewed paper work with owner to make sure everything was completed and correct. Gave paperwork to SP.

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Name: Alfred Szebel      Request #: 0554-CBRT93EQU6      Status: Completed  
Address: 1615 E Central Rd 420C Arlington Hghts, IL 60005      Date Entered: 12/28/2012      Received By: Cheri Brandt  
Type of Request: Account Information;Coupon Book Request

**Description:**

Alfred Szebel, owner calling to get new account # and payment mailing address for MA. Owner inquired as to when she would be receiving her 2013 Coupon Book.

**Resolution:**

Provided owner with account # and lockbox address as requested. Advised owner payments are due on 1st of the month and not to wait for coupon book to make a payment. 2013 Coupon Book will be sent by LMS sometime after January 1, 2013

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**THE DANA POINT CONDOMINIUM  
ASSOCIATION**

40    Information Requests Entered

December 2012

**Ims lieberman management services**

## **Work Order Report**

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**Prepared for Community**

**THE DANA POINT CONDOMINIUM ASSOCIATION**

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**Reporting Period**

**December 2012**

**Issue Date**

**1/2/2013**

**Community THE DANA POINT CONDOMINIUM ASSOCIATION**

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**Name:** Laurie Wishnoff      **Date Entered:** 12/18/2012      **Status:** Open  
**W/O #:** 0554-LWIF934RAP      **Est. Comp. Date:** 12/25/2012      **Billed To:** N/A  
**Address:** THE DANA POINT  
CONDOMINIUM  
ASSOCIATION Common Area      **Vendor:** MIS - HELPDESK

**Service Request:**

Please create a MOVE calendar and a CLUBHOUSE calendar for this property.

**Work Performed:**

Thank you

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**THE DANA POINT CONDOMINIUM ASSOCIATION**

**1 Work Orders**

**December 2012**