

Thanks for taking the time to get to know us.

We're thrilled with the opportunity to tell you more about Sharper Management! This packet includes information on everything we offer and we're happy to customize a plan to meet your community's unique needs. Here's a quick look at what you'll find in the following pages:

- ❑ **An Overview of the Sharper Management Business Approach**
- ❑ **A Look at our Executive Team**
- ❑ **Our Property Management Services**
- ❑ **Our Administrative Services**
- ❑ **Our Financial Services**
- ❑ **Our Maintenance Services**
- ❑ **Complete List of Company Offerings**

"Sharper Management stands head and shoulders above their competitors with their straightforward, hands-on, no-nonsense approach to managing our business. After contracting them to work with us, I can confidently say, that Sharper Management's day-to-day performance is every bit as helpful, efficient, and quick as they promised it would be."

Doug F., Pheasantwood HOA President



OVERVIEW

A Personal Approach to Property Management.

The Sharper Management story began when, after working for years in the industry, we decided there must be a better way to do business. After all, these are people's homes and often their most important investment – managing these properties should be personal and service-oriented. So we (Dan, Matt, Joel, and Nick) decided to combine our diverse talents, local interests, and years of property management experience to establish a better approach to managing property.

*We each brought a unique set of industry-specific talents and together founded our company based on one guiding mission :
To provide common interest communities the highest quality management services through a culture of communication, teamwork, and growth.*

This personal approach has been well-received by the HOA industry and we're now a mid-sized firm managing more than 5000 units throughout the Twin Cities area – many of whom have been with us since our start. Sharper Management is recognized as a reliable and committed partner in condominium and townhome association management, providing a full-suite of premiere services to clients throughout the Minneapolis-St. Paul area in addition to Rochester and greater Minnesota. We all remain firmly grounded right here and believe that our work helps further the goal of making the Twin Cities and all of Minnesota one of the best places to live. We really are your Minnesota neighbor, right next door and ready to help.

As true Minnesotans we find it a bit hard to talk about ourselves – especially if it means singing our own praises. But we'll give it a try because we know you're probably wondering how four guys have revamped this staid industry. Here's just a few things we're especially proud of:

■ **Communication Platform.** We feel our commitment to communication and transparency is the key to our successful partnerships. It ensures that every community member feels connected, informed, and important to your association. Through regular Property Manager updates, resident site announcements, and 24/7 access to property and financial reports, board members especially have a real-time picture of every issue affecting the association.

■ Our Team. We've assembled a team of industry experts so you'll have a qualified resource readily available for your community's needs. From financial services to organizational issues to maintenance concerns, our certified and experienced managers help guide and support each decision your Board makes. Through ongoing education, we all stay on the leading edge of industry trends, regulations, and changing markets.

■ An industry-unique, "all-hands on deck" approach to every association. As our partner, you'll feel the strength of the entire Sharper Management Team behind your community. You'll have access to all of our resources and professionals, who will bring their broad range of talents to meet your community's specific needs with workable, cost-effective solutions.

■ A collaborative partnership approach to property management. We understand that every association and board is unique and for your community to be successful, we must work together. We'll sit down to assess your wants and needs, as a board and as an association, so that we all start on the same page. And don't worry if you're unsure, we know which questions to ask!

■ As your neighbors, we're also active in the community and are members of local Chambers of Commerce, Community Associations Institute (CAI), and Common Interest Community (CIC Midwest.)

Most importantly, we understand this isn't just a community association but also your home. So when you return every night or invite guests for a visit, we want you to be comfortable, happy, and proud of the work you've done to build a successful and thriving community.

We look forward to helping you manage and maintain your homeowner's association. We're confident that you'll be happy with our services - which is why we offer a 60-day cancellation policy on all contracts.

EXECUTIVE TEAM

Meet the Sharper Management Team.

Dan Cunningham, Esq.

Partner, Managing Broker

Dan began his career in law and real estate upon graduating from the Pepperdine University School of Law in 1997. He has extensive experience in the real estate field, holding various positions in the mortgage industry and the land, commercial, and apartment brokerage sectors. Dan is our managing broker and his legal background regularly proves beneficial for Sharper Management's clients.

Matt Froehlich

Partner, Head of Operations

After a stint playing professional hockey in Europe, Matt began his career in the real estate industry specializing in the investment sales of multi-family properties in Minnesota. Nearly 10 years later, Matt has a thorough understanding of client service and is continually working to improve company operations to benefit clients. He graduated with dual Bachelor of Science degrees in Finance and Management from Quinnipiac University.

Joel Starks

Partner, Head of Business Development

Joel is a Minnesota native and for ten years managed sales teams and solution consultants for several big-name companies, including Wells Fargo. Since 2005, he's specialized in property management and currently serves on the Board of Directors for the Minnesota Chapter of Community Associations Institute (CAI).

Nick Schilling

Partner, Head of Finance

Nick holds a degree in Management Information Systems from the University of Minnesota-Duluth, where he graduated cum laude. His experience includes ten years of accounting, information technology, and financial analysis for a Fortune 500 financial service company. He also earned Six Sigma Green Belt Certification prior to joining Sharper Management in 2010.

Candy Lee

Director of Community Management

Candy is a dynamic and detail-oriented leader with years of extensive experience in multiple aspects of community management. She has worked in the property management industry since 1994 and works closely with every manager to ensure the highest level of support and service to our clients.

A Minnesota Neighbor You Can Rely On.

Although we've grown into a mid-sized firm, we still use a small business approach to client service. Our original executive team continues to work closely with our clients and we each maintain a true hands-on approach to property management. Over the last few years, we've grown our employee base to include over 50 people and each of these folks bring amazing talent, broad experience, deep local market knowledge, and great attitude to our company and to every client. We've also built an extensive network of dedicated contractors and skillful partners who are at-the-ready to help out in every situation. And we're all Minnesotans who live and work right here in the Twin Cities. We're proud of our Sharper Management family and know that you'll enjoy working with every member of our staff.

We also take employee growth and continuing education seriously and know that we can always learn more to improve our skill sets. As a company, we offer employees many ongoing learning opportunities including trade seminars, internal lunch and learns, and collaborative manager meetings. Not only does this keep everyone up on the latest trends, but it renews our mission to be the best in the business. We work to create managers that are a client resource and not just note-takers.

One of our goals from the beginning was to create a company that is considered a great place to work. We feel we've accomplished this goal and we take great pride in providing a welcoming and positive culture for our employees, vendors, and association members.

"The thing I really like about Sharper Management is that they have taken our association as their own and they want it to be great, just like we do. They're experts at what they do and so we trust them. I think all of our members are happier now that we're managed by professionals. I have recommended them 110%."

Adrienne S., President, Townhomes at Pine Point.

Our door is always open, so please stop by if you're in the neighborhood.

PROPERTY MANAGEMENT SERVICES

The Sharper Advantage.

As homeowners ourselves, we understand the value and importance of this large investment and, that for your members, this may be their most significant asset. As a board member, you're not only protecting your own investment but you've been entrusted to care for the investments of dozens or even hundreds of people. Handling it all efficiently and accurately requires quite the collection of skills. That's why finding the right property management team can truly be the difference between success and failure.

Here at Sharper Management, we believe your team leader or Community Manager is fundamental to successfully managing your property. This person is your main point of contact and is well-versed in handling the unique challenges that come with managing a HOA – from dealing with vendors to handling finances to knowing the right person to call in an emergency. Your Community Manager must also deeply understand the unique needs of your community and be able to develop solutions that fit your situation.

*Your Community Manager must be your support system,
your 24/7 back-up, and your helpful
next door neighbor all wrapped into one.*

That and more is what you'll find with Sharper Management as your partner. All of our Community Managers are experienced specialists in property management and hold multiple levels of certification. Your dedicated, CMCA-certified manager will take the lead in making sure your property runs smoothly and will collaboratively manage a team of experts covering everything from record-keeping to lawn-mowing. We believe in keeping the lines of communication open so you can count on regular manager updates, 24/7 access to your records, and always-open emergency lines. So not only will you have a top-notch management partner but with one phone call or click, you'll have ready access to our entire team of experts.

Management is more than just running numbers and creating reports! Sharper's unique, proactive approach to property management means we make it our job to truly understand the workings of your association. Your Community Manager stays connected and actively engaged with your board members, with the vendors working for you, and with the unique issues affecting your property. This connection not only gives us a full picture of your HOA but provides us with a real-time perspective of your needs so we can build our services around your community.

❑ **Overall Project Management.** Each manager will work with your Board to determine your needs, define each project's scope, acquire bids, and see the project through to completion.

❑ **Frequent Site Presence.** You can expect to see a lot of your Community Manager! As part of our hands-on management style, your manager will frequently visit your property to assess rule compliance, project progression, maintenance needs, and more.

❑ **Vendor Management.** It takes a host of vendors to keep your property running smoothly. Hiring, supervising, and firing service vendors is a critical component to your operations and we'll manage the vendors so you don't have to. We also have an extensive network of vendor connections allowing us to make trusted recommendations with competitive pricing.

❑ **On-Site Staff Management.** We can also help manage on-site staff including hiring, training, supervision, legal compliance, benefit management, discipline, and termination management. Access to our human resources is a great asset for any association with staff to manage.

❑ **Emergency Response.** You can rely on our managers and trusted service technicians to be accessible at any time – day or night, weekends, and holidays.

"We finally feel like we have a partner in the management of our HOA! We've worked with other management companies but Sharper really stands above the rest. The commitment from the entire team is noticeable. From the community manager to the owners of the company, they all seem truly vested in the success of our community."

Robert C., Hawthorne Carriage Homes Association



Like every good neighbor, we have a garage full of tools, ready to go!

ADMINISTRATIVE SERVICES

Building Sharper Associations.

As you know, running a Homeowner's Association efficiently is akin to managing a small business. From paperwork and recordkeeping to meeting coordination to rule enforcement, getting the job done right really requires a team of experts. Instead of using your valuable free time to tackle these chores, you can trust Sharper Management to keep things running smoothly.

Our friendly and reliable staff will handle all of your community's administrative needs in a timely, dependable manner. We've developed an experienced team of professionals and armed them with the latest processes and tools so you no longer need to worry about the nuts-and-bolts of managing your property. Just a few of the Administrative Services we offer:

❑ **Homeowner Communication.** Whether it's an emergency phone call or a quarterly letter, we'll help you keep the lines of communication open with all your residents. Our professionally-composed communications include association newsletters, informational letters, emails, phone calls, after-hours emergency lines, and more.

❑ **Website Management and Online Tools.** We provide complete website services from creating your own HOA website to updating property announcements to managing board member access. We'll also help you create an online Resident Directory so you can quickly communicate with the members of your community.

❑ **Board Meeting Facilitation.** From scheduling to sending out notices to providing board packets, we'll make sure every step of the meeting process runs smoothly. Some boards prefer to run their own meetings, while others ask us to do it for them – whichever style you prefer, Sharper Management can help facilitate effective and productive board meetings.

❑ **Board Member Training.** As volunteers, board members often bring a wide range of experiences which can be a challenge when facing the dynamics of managing a large property. We'll help you and your board learn the ropes so you can feel more prepared to manage the demands of your community.

❑ **Rules, Regulations, and Legal Issues.** Our thorough knowledge of rules and regulations ensures that you stay in compliance with state, federal, and local rules and avoid costly lawsuits or governmental fines. We'll help you craft, enforce, and interpret Homeowner's Association governing documents and make sure all board members fully understand them. We'll also stay on top of legal issues as they relate to your property.

❑ **Insurance Reviews.** Your manager will periodically review your insurance policies to make sure you have the proper coverage levels for your community.

❑ **Vendor Negotiations.** Because we're so familiar with the local market, we can help you find the best vendors and negotiate fair and competitively-priced contracts.

❑ **Paperwork.** Even in this electronic age, we still must handle a lot of paperwork. We'll help you file and store all association documents.

❑ **Resale Management.** When the time comes for ownership changes, we'll make sure all the paperwork is assembled, up-to-date, and properly filed.

❑ **Builder and Developer Transitions.** Your Community Manager can be the point-person in handling this very important transition. We'll work closely with the developer and your Board to make sure all transition conditions are met satisfactorily.

"I would recommend Sharper because they are very responsive, they are enthusiastic, they are ethical, they get back right away to our calls or questions, and find the answers if they don't know them. They have just really made our lives a lot easier."

Deb B., Secretary, Pheasantwood HOA.



FINANCIAL SERVICES

A Sharper Way to Manage Your Finances.

From banking to taxes to long-term financial planning, our team of experts provides guidance, open communication, and transparency across all financial responsibilities. Our cutting edge system offers the most advanced and secure software available, giving you instant access to all property and financial reports. Through our exclusive banking partnership, your HOA will have its own checking account to handle all income collection and expense disbursements. You'll also have a dedicated account representative and best of all, will not be charged any banking fees. Through our best-in-class software system, financial reporting is completely customizable to your needs including: bank statements, balance sheets, general ledgers, budget comparison vs. actual expenses, delinquency reports, and more.

Your financial records and real-time account information is available online to Board members at any time.

Whatever financial issue your community faces, Sharper Management has our own on-site Accounting Department with broad experience in every HOA financial challenge including:

- **Assessment Collection.** Annual or special assessments can be paid directly to your checking account through a range of options (check, automatic withdrawal, online bill pay, or by credit card.) You'll also have the option of implementing our tested and results-driven collection policy which is streamlined to help the association collect delinquent assessments.
- **Accounts Receivable and Accounts Payable.** We can handle all the day-to-day incoming and outgoing monies through our advanced accounting software system. Your community manager will approve and code all invoices to ensure that services have been satisfactorily rendered, transactions are properly recorded for your financials, and invoices are paid on time. With our real-time reporting, you'll be able to check your accounts whenever you'd like.

- ❑ **Collections Management.** We have a dedicated staff and a proven collection policy to help associations collect on delinquent accounts.
- ❑ **Operating Budget Management.** Your Community Manager will work with your Board to develop a thorough budget to help determine the financial position and needs of the association.
- ❑ **Reserve Studies.** A well-thought out Reserve Study is important to ensure the financial health of your community. We'll work with your board and your selected reserve study vendor to update or create a new study that aligns with your association's goals and financial conditions.
- ❑ **Tax and Audit Assistance.** We stay abreast of the ever-evolving tax laws and requirements related to Homeowner's Associations. We'll work closely with your existing accounting firm or introduce you to a firm well-versed in association tax law.
- ❑ **Association Financing.** Our network of banking partners and relationships allow us unfettered access to assist boards with obtaining association financing.

We can customize our financial packages to meet the unique needs of your Homeowner's Association. We also offer a competitively priced financial services-only package. Please see the additional information included at the back of this packet detailing all of our services.

"Having a dedicated person working with a collection policy - at no extra cost to the association - is a great resource for our community. Our delinquencies are down and we have lower legal bills. Sharper Management has definitely improved the financial stability of our association."

Kathy D., Midtown Terraces Association

"Sharper Management is by far the most transparent company we have ever worked with. Having instant access to our financials with the ability to see detail on invoices is a great feature that keeps us tuned to the pulse of the community and our finances."

Calvin J., Lake Forest Townhouses Association

MAINTENANCE SERVICES

Sharper Maintenance.

Maintaining a large property can be a daunting task that requires vigilance and an eye on the bottom line. We'll follow your lead in determining how much – or how little – maintenance assistance your community needs. We base our maintenance service commitment on integrity and throughout each and every decision we keep your community's best interests in mind. At the core of our commitment is an experienced and knowledgeable crew of industry professionals ready to assist you in everything from preventative maintenance to emergency repairs. Because we've vetted and certified these valuable employees, you can trust they'll be professional, thorough, and attentive to your needs. Additionally we maintain a network of licensed, bonded, and certified contractors that we trust to provide top-notch work at locally competitive prices.

Whether you need a full maintenance crew, emergency call service, or minimal oversight, the Sharper Management team has the maintenance professionals to help you.

Through regular onsite inspections, your Community Manager will help identify maintenance needs early on and take the steps needed to fix them before they become bigger, more expensive problems. If needed, we'll work with your Board to develop an ongoing property care plan, preventative maintenance schedules and documentation, bid proposals and vendor negotiations, project oversight, and job completion reviews. Our maintenance crew also keeps an eye out while they're on your property and will alert us to any problems they find. In addition, you'll have instant access to a staff maintenance professional through our 24-hour emergency response line.

Sharper Management can also provide competitively priced one-time project work, seasonal maintenance, or individual homeowner remodels, performed by our licensed General Contractors in any of these areas:

- ❑ Light Plumbing and HVAC
- ❑ Light Electrical
- ❑ Exterior repairs
- ❑ Drywall and painting
- ❑ General property upkeep
- ❑ Pool cleaning and maintenance

Maintaining your property not only protects your investment but it also makes your community a more appealing and comfortable place to live. Sharper Management can help you stay on top of your to-do list with reliable and trusted maintenance professionals.

COMPANY OFFERINGS

Sharper Management's Full Suite of Property Management Services.

As a full-service property management company, there isn't much we can't handle when it comes to association management. We take a true teamwork approach to every task and as our client, you'll have access to the entire Sharper Management team of experienced professionals. Although most of our customers do take advantage of the full service plan, we additionally offer financial-only or maintenance-only contracts.

Property Management

- CAI- and CIC-certified managers
- Site inspections
- Vendor management
- Project management
- Compliance management
- On-site staff management
- 24/7 emergency response

Administrative

- Homeowner communication, online, in print, and onsite
- Board meeting facilitation
- Board member training
- Rules and regulation compliance
- Legal assistance
- Insurance reviews
- Governing document guidance and enforcement
- Resale management
- Builder and developer transitions
- Website creation and management

Financial

- Safe and secure, 24-hour online banking access, with no banking fees
- Best-in-class software accounting system
- Dues collection
- Delinquency management and collections facilitation
- Accounts payable and receivable
- Bank statement reconciliation
- Audit and tax assistance
- Operating budget preparation and management
- Coupon Books
- Long-term capital plan facilitation
- Lockbox services

Maintenance

- Licensed, bonded, and insured on-staff maintenance crew
- On-call emergency response
- Day-to-day repair and maintenance
- Homeowner repair and remodel
- Light Plumbing and HVAC
- Light Electrical
- Exterior repair and maintenance
- Drywall and painting
- General property upkeep
- Pool cleaning and maintenance