



Associa®

## Kramer-Triad Management Group, L.L.C.

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Dear Co-Owners,

The Board of Directors has approved the 2023 operating budget, which is enclosed for your records.

The primary goal of the Board during budget deliberations is to preserve the investment that the owners have in their units and to maintain the level of service that the owners desire. In an effort to maintain financial stability and a healthy reserve fund, the monthly assessments will stay at \$450 for the 2023 budget season.

Association fees are due on the 1st of each month and a \$25.00 late charge will be added to any payments that are received after the 10<sup>th</sup> of the month. Please check the coupon for the correct address and fee information. If there are errors, please contact Associa Kramer-Triad Management Group at (866) 788 5130.

**If you are currently utilizing automatic withdrawal, no coupon book will be sent, and the monthly fee will continue to be withdrawn automatically.** For those wishing to sign up for automatic withdrawal from your bank account, a form is enclosed for you to use. Automatic withdrawal (ACH) is an easy way to make your association payment and avoids the potential for a late payment.

There are also other payment options available to you at this time. Payments can be made by E-Payment or by Credit Card (Visa, MC, Discover and Amex only) on [www.townsq.io](http://www.townsq.io). Please note that a convenience fee applies for this option.

If any of your personal contact information recently changed, please take a moment to fill out the enclosed Co-owner Information Form and return the completed form to the office of Associa Kramer-Triad:

Wishing you and yours a very happy holiday season and a prosperous New Year!

Sincerely,

**Associa Kramer-Triad Management Group, L.L.C.**

for and on behalf of the **Lakeview Estates Condominium Association**

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555 Briarwood Circle • Suite 140 • Ann Arbor MI 48108  
734.973.5500 866.788.5130 Fax 734.973.0001 [www.kramertriad.com](http://www.kramertriad.com)

**AAMC**  
COUNCIL FOR ASSOCIATION  
MANAGEMENT CAPACITY

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Lakeview Estates Approved Amended Budget Jan 1 2023 - Dec 31, 2023

Units:

132

| Income                       |                                       | <u>Annual</u> | <u>Month</u> | <u>Per Unit</u> |
|------------------------------|---------------------------------------|---------------|--------------|-----------------|
| Association Dues             |                                       | \$712,800.00  | \$59,400.00  | \$450.00        |
| Total Income                 |                                       | \$712,800.00  | \$59,400.00  | \$450.00        |
| <b>Expenses</b>              |                                       |               |              |                 |
| Administrative               | Audit                                 | \$1,000.00    | \$83.33      | \$0.63          |
|                              | Management Fee                        | \$15,797.67   | \$1,316.47   | \$9.97          |
|                              | Duplicating                           | \$0.00        | \$0.00       | \$0.00          |
|                              | Bad Debts                             | \$0.00        | \$0.00       | \$0.00          |
|                              | Filing Fees/Permits                   | \$200.00      | \$16.67      | \$0.13          |
|                              | Miscellaneous Administrative Services | \$7,800.00    | \$650.00     | \$4.92          |
|                              | Postage                               | \$0.00        | \$0.00       | \$0.00          |
|                              | Website Remodel                       | \$0.00        | \$0.00       | \$0.00          |
|                              | Website Maintenance                   | \$300.00      | \$25.00      | \$0.19          |
| Legal                        | Legal Fees                            | \$8,000.00    | \$666.67     | \$5.05          |
| Building Maintenance         | Critter Removal/Maintenance           | \$3,000.00    | \$250.00     | \$1.89          |
|                              | Drywall Repairs/Replacement           | \$2,000.00    | \$166.67     | \$1.26          |
|                              | Electrical                            | \$10,000.00   | \$833.33     | \$6.31          |
|                              | Plumbing                              | \$18,000.00   | \$1,500.00   | \$11.36         |
|                              | Exterminating                         | \$2,000.00    | \$166.67     | \$1.26          |
|                              | Maintenance Supplies                  | \$4,000.00    | \$333.33     | \$2.53          |
|                              | Foundation Building Repairs           | \$0.00        | \$0.00       | \$0.00          |
|                              | General Repair & Maintenance          | \$30,000.00   | \$2,500.00   | \$18.94         |
|                              | Gutter Cleaning                       | \$3,000.00    | \$250.00     | \$1.89          |
|                              | Reserve Study                         | \$0.00        | \$0.00       | \$0.00          |
|                              | Roof Inspections                      | \$0.00        | \$0.00       | \$0.00          |
|                              | Roof & Venting Repairs                | \$10,000.00   | \$833.33     | \$6.31          |
|                              | Sewer Backup Maintenance              | \$7,000.00    | \$583.33     | \$4.42          |
| Clubhouse & Pool Maintenance | Alarm System                          | \$1,000.00    | \$83.33      | \$0.63          |
|                              | Maintenance/Supplies                  | \$1,000.00    | \$83.33      | \$0.63          |
|                              | Telephone/Internet                    | \$1,500.00    | \$125.00     | \$0.95          |
|                              | Natural Gas                           | \$1,800.00    | \$150.00     | \$1.14          |
|                              | Pool Maintenance/Supplies/Repair      | \$17,000.00   | \$1,416.67   | \$10.73         |
| Grounds Maintenance          | Lawn Fertilizing                      | \$6,500.00    | \$541.67     | \$4.10          |
|                              | Grub Control                          | \$0.00        | \$0.00       | \$0.00          |
|                              | Mole Control                          | \$0.00        | \$0.00       | \$0.00          |
|                              | Landscape Maintenance                 | \$1,800.00    | \$150.00     | \$1.14          |
|                              | Rubbish Removal                       | \$19,754.40   | \$1,646.20   | \$12.47         |
|                              | Lawn / Snow Removal Contract          | \$85,000.00   | \$7,083.33   | \$53.66         |
|                              | Recycling                             | \$2,235.00    | \$186.25     | \$1.41          |
|                              | Salting/Ice Melt                      | \$20,000.00   | \$1,666.67   | \$12.63         |
|                              | Tree/Shrub Maintenance etc            | \$6,500.00    | \$541.67     | \$4.10          |

|                                     |                                       |                     |                    |                 |
|-------------------------------------|---------------------------------------|---------------------|--------------------|-----------------|
|                                     | Yard Waste Removal                    | \$1,000.00          | \$83.33            | \$0.63          |
|                                     | Parking Lot Painting                  | \$0.00              | \$0.00             | \$0.00          |
|                                     | Asphalt Patchwork                     | \$35,000.00         | \$2,916.67         | \$22.10         |
|                                     | Mulch                                 | \$1,500.00          | \$125.00           | \$0.95          |
| Contracted Labor                    | Maintenance Equipment                 | \$1,000.00          | \$83.33            | \$0.63          |
|                                     | Maintenance Contract Wages/AOC/DJS    | \$27,000.00         | \$2,250.00         | \$17.05         |
| Insurance                           | Property Insurance                    | \$30,000.00         | \$2,500.00         | \$18.94         |
|                                     | Workers Comp Insurance                | \$0.00              | \$0.00             | \$0.00          |
|                                     | D&O Insurance                         | \$2,500.00          | \$208.33           | \$1.58          |
| Utilities                           | Electric                              | \$6,600.00          | \$550.00           | \$4.17          |
|                                     | Water Bills                           | \$52,500.00         | \$4,375.00         | \$33.14         |
| Miscellaneous Operating Expenses    |                                       | \$20,000.00         | \$1,666.67         | \$12.63         |
| <b>TOTAL OPERATING EXPENSES:</b>    |                                       | <b>\$463,287.07</b> | <b>\$38,607.26</b> | <b>\$292.48</b> |
| <b>Forward Reserve Contribution</b> |                                       | <b>\$249,512.93</b> | <b>\$20,792.74</b> | <b>\$157.52</b> |
| <b>Possible Reserve Projects</b>    |                                       |                     |                    |                 |
|                                     | Concrete/Porch Repairs                | \$100,000.00        | \$8,333.33         | \$63.13         |
|                                     | Storm Water Drain Diagnostic & Repair | \$40,000.00         | \$3,333.33         | \$25.25         |
| <b>Net Reserve Contribution</b>     |                                       | <b>\$109,512.93</b> | <b>\$9,126.08</b>  | <b>\$69.14</b>  |





# REQUEST FOR AUTOMATIC PAYMENT OF ASSESSMENTS

Thank you for your interest in Electronic Funds Transfer. Please fill out the following information to complete this request.

## HOMEOWNER AUTHORIZATION FOR ELECTRONIC FUNDS TRANSFER

I authorize the branch and the financial institution listed below to debit my bank account automatically for each association assessment billing period. **Note: Information below is required. If not provided, there will be delays in processing your direct debit request.**

Management Company Name: Kramer Triad Management

Homeowner Name: \_\_\_\_\_

Homeowner Account Number: \_\_\_\_\_

Association Name: \_\_\_\_\_

Address And Unit #: \_\_\_\_\_

City: \_\_\_\_\_ State: MI Zip: \_\_\_\_\_

Direct Debit Start/Stop Date (MM/YYYY): \_\_\_\_\_ / \_\_\_\_\_

Homeowner Bank Name: \_\_\_\_\_

Homeowner Bank Routing Number: \_\_\_\_\_

Homeowner Bank Account Number: \_\_\_\_\_

- CHECKING ACCOUNT** - Include a voided check from the account you would like to debit
- SAVINGS ACCOUNT** - Include letter from bank that includes your full account number and routing number. **Statements will not be accepted.**

*Only checks for US Banks will be accepted. Deposit slips cannot be used in place of a voided check.*

Signature: \_\_\_\_\_

*In order for funds to be pulled in time for next month's assessment, this form must be received no later than the 20th of the prior month. The automatic payment process will begin with your next assessment period once we have received your completed form and either your voided check or letter from bank that includes your full account number and routing number.*

**Return by email: Scan and send this form and a voided check to: [csscdirectdebit@associa.us](mailto:csscdirectdebit@associa.us)**

**Return by mail:**

Complete and send this form and a voided check to the following address:

OR

**Associa**  
1225 Alma Rd., Suite 100  
Richardson, Texas 75081

*Delivering unsurpassed management and lifestyle services to communities worldwide.*

**Co-owner Information Sheet**

Date Received By:

**CO-OWNER(S) INFORMATION**

|                                          |                                    |                                    |                                                                 |  |
|------------------------------------------|------------------------------------|------------------------------------|-----------------------------------------------------------------|--|
| <input type="text"/><br>Co-owner Name(s) |                                    |                                    | <input type="text"/><br>Community Address                       |  |
| <input type="text"/><br>Closing Date     | <input type="text"/><br>Building # | <input type="text"/><br>Unit #     | <input type="text"/><br>Mailing Address if Different Than Above |  |
| <input type="text"/><br>E-mail Address   |                                    |                                    |                                                                 |  |
| <input type="text"/><br>Home Phone       | <input type="text"/><br>Work Phone | <input type="text"/><br>Cell Phone | <input type="text"/><br>Winter/Seasonal Phone                   |  |

**EMERGENCY CONTACT INFORMATION** (List at least 1 with a key to the unit)

|                                      |                                      |                                      |
|--------------------------------------|--------------------------------------|--------------------------------------|
| Name:<br>Relation:<br>Home:<br>Cell: | Name:<br>Relation:<br>Home:<br>Cell: | Name:<br>Relation:<br>Home:<br>Cell: |
| Emergency Contact # 1                | Emergency Contact # 2                | Emergency Contact # 3                |

**AUTOMOBILE INFORMATION**

| VEHICLE # 1 |                      |       | VEHICLE # 2          |                      |                      | VEHICLE # 3 |                      |      |                      |       |                      |
|-------------|----------------------|-------|----------------------|----------------------|----------------------|-------------|----------------------|------|----------------------|-------|----------------------|
| Make        | <input type="text"/> |       | Make                 | <input type="text"/> |                      | Make        | <input type="text"/> |      |                      |       |                      |
| Model       | <input type="text"/> |       | Model                | <input type="text"/> |                      | Model       | <input type="text"/> |      |                      |       |                      |
| Color       | <input type="text"/> |       | Color                | <input type="text"/> |                      | Color       | <input type="text"/> |      |                      |       |                      |
| Year        | <input type="text"/> | State | <input type="text"/> | Year                 | <input type="text"/> | State       | <input type="text"/> | Year | <input type="text"/> | State | <input type="text"/> |
| Plate #     | <input type="text"/> |       | Plate #              | <input type="text"/> |                      | Plate #     | <input type="text"/> |      |                      |       |                      |

**PET INFORMATION**

|                     |                      |     |                      |        |                      |
|---------------------|----------------------|-----|----------------------|--------|----------------------|
| Name                | <input type="text"/> | Age | <input type="text"/> | Sex    | <input type="text"/> |
| Breed & Description | <input type="text"/> |     |                      | Weight | <input type="text"/> |
| Veterinarian Info   | <input type="text"/> |     |                      |        |                      |

**TENANT INFORMATION** (If unit is rented)

|                                        |                                    |                                          |
|----------------------------------------|------------------------------------|------------------------------------------|
| <input type="text"/><br>Tenant Name(s) |                                    | <input type="text"/><br>Lease Expiration |
| <input type="text"/><br>Home Phone     | <input type="text"/><br>Cell Phone | <input type="text"/><br>E-mail Address   |

**MORTGAGEE OR LAND CONTRACT INFORMATION** (Required by Community Documents)

|                                                                |                                                |
|----------------------------------------------------------------|------------------------------------------------|
| <input type="text"/><br>Name of Mortgage Company or Individual | <input type="text"/><br>Loan # (If Applicable) |
| <input type="text"/><br>Address                                | <input type="text"/><br>Phone Number           |

**INSURANCE COMPANY INFORMATION**

|                                         |                                  |                                 |
|-----------------------------------------|----------------------------------|---------------------------------|
| <input type="text"/><br>Name of Company | <input type="text"/><br>Policy # | <input type="text"/><br>Phone # |
|-----------------------------------------|----------------------------------|---------------------------------|

Please return to 320 East Big Beaver, Ste. 190 Troy, MI 48083  
(866)788-5130 Fax (248)879-5507 CustomerService@kramertriad.com

