

AMI Corporate Philosophy:

Each association is unique. A custom management plan will be developed to serve the physical requirements of the property, the administrative requirements of the board and the level of service requirements of the members.

A licensed community association manager, property management assistant, and accountant will be assigned to the association to develop a detailed understanding of the property and association requirements.

AMI will work through the assigned manager to provide centralized team support for administrative and service requests as well as communications for directors and association members.

AMI believes that associations are best served when maintenance and other service contractors are independent and competitively bid. AMI has no captive or affiliated service companies and receives no fees or gratuities from Association contractors or suppliers. All discounts and savings go to the association.

History

After 18 years of asset management for private and institutional clients, Douglas E. Wilson formed Advanced Management of Southwest Florida, Inc. in 1991 in response to community needs for an independent, truly professional association management firm that is thorough and responsive to client needs. AMI has grown to be one of the largest professional management firms in the area.



Advanced Management, Inc.
of Southwest Florida



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Lakewood Ranch, FL 34202
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Mission Statement: AMI - Advanced Management, Inc., is a management services provider to residential and commercial property owners throughout the west coast of Florida. It is the mission of AMI to provide services that will allow clients more freedom and value enhancement by professionally handling the responsibilities and burdens of real estate ownership.

AAMC National Designation: AMI is one of a limited number of companies nationwide to have earned the AAMC designation, the highest national designation awarded by the Community Association Institute. It is awarded based on the financial strength, bonding capacity, insurance coverage, ethical standards, and professionalism of staff.



What is the AMI Advantage? The AMI Advantage is: Exceptional service as a result of a major investment in facilities, systems, and personnel.

Community Association Services:

AMI offers professional management services that consistently handle the detail of the Florida legal requirements and frees the Directors' time for executive overview and policy making. AMI offers a full range of services at competitive prices and emphasizes professionalism as well as service to customers.

Client Services: AMI has a Client Services system in place that enables anyone who answers the phone to address most questions and requests. Through an extensive database system each community has been profiled into an electronic reference manual. Client Service personnel can quickly search the profile or process a request. Clients are not routinely sent to voicemail nor are responses delayed awaiting the return of the assigned manager.

Transition Plan Commitment: AMI has a standing commitment to complete a formalized transition for new clients. This includes a reconfirmation of unit owner contact information; establishment of an individual private, interactive website; establish an on-line owners reference manual; and confirmation of standard operating policies including collections, violations, and board member and owner communications.

Administrative Services:

- General administration of Association.
- Assistance to Board of Administrators.
- Maintain Association files and records.
- Assist with communications and mail-outs.
- Owner and resident rosters maintained.
- Rules and regulations enforcement.
- General correspondence.
- Resolve owner problems.
- Legal counsel liaison.
- Membership and board meetings.
- Annual meeting and elections.
- Security program implementation.
- Tenant and owner application approval.
- Architectural controls and guidelines.
- Insurance review and administration.
- Document disclosure for resale.

Maintenance Services:

- Emergency 24 hour "hot-line".
- Develop maintenance specifications.
- Regular property inspections.
- Obtain and negotiate bids, proposals and contracts.
- Monitor contractor performance.
- Purchasing and inventory controls.
- Preventative maintenance programs.
- Personnel programs.

Financial Services:

- Annual budget and reserve preparation.
- Financial statements and reports.
- Establish and maintain bank accounts.
- Collect and deposit assessment fees.
- Follow up on delinquent accounts.
- Timely review and payment of obligations.
- Maintain individual owner account records.
- Direct preparation of tax returns.
- Establish disbursement approval procedure with Treasurer and Board.

Board Member Education: AMI has established a program to provide regular educational seminars to its board members. This service is provided on an annual basis and is open to all board members of AMI Association clients. AMI will not only address topics themselves, but will bring in experts in other professions including legal, insurance, finance, and maintenance related fields.

Staffing: AMI has taken an innovative, unique approach to staffing. In addition to the Client Services Department, each Association account has two individuals assigned responsibility: The Property Manager and the Assistant Property Manager. Because the nature of the business requires that the Property Manager be out of the office approximately 50% of the time, specific requests and questions can be directed to the Assistant Manager throughout the business day. In addition, the Client Service Personnel answer most questions on the first phone call.

Commitment to Professional Education:

AMI is committed to advance Property Manager knowledge by requiring additional education through the advanced designations available in the Community Association Institute. Most Managers have achieved or are pursuing advanced designations beyond simply being licensed by the State of Florida. AMI also provides continuing education monthly to its management personnel as well as educational opportunities to its Accounting and Administrative staff.