



# Association Consulting Group

[www.myassociationadvisor.com](http://www.myassociationadvisor.com)

## Personal Profile

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Co-Founder and Senior Advisor

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**Community association industry executive** with 30+ years of financial and accounting background with both for profit and not for profit corporations as well as 15+ years of HOA board governance, standard of care and best practice experience. Certified CCAM with the California Association of Community Managers and as an CMCA with the Community Association Institute.

### Areas of advisory expertise

#### Association Governance

- Policy and Rules Creation
- Board and Management standards of care and fiduciary responsibility
- Meetings and elections standardization
- Best practices for effective governance

#### Financial Compliance

- Accrual accounting for associations
- Effective budgeting and communications
- Post tax return and financial review general ledger requirements
- Best practices for board review of financial reports

#### Special Projects

- Creation of RFPs for management contracts
- Forensic accounting and detailed financial reviews (non-CPA)
- Independent review of key financial documents (tax returns, CPA reviews, reserve studies and budgets)

#### Key Affiliations

- Community Association Institute (CAI)
- California Association of Community Managers (CACM)
- Educational Community for Homeowners (ECHO)