

# Quick Reference List

## INFORMATION ON EACH RESIDENT

- ✓ Name
- ✓ Unit/Lot number and/or property address
- ✓ Other residences
- ✓ Next of kin name(s)/contact info
- ✓ Identifying features
- ✓ Social security number
- ✓ Medications
- ✓ Cell phone number
- ✓ E-mail address

## INFORMATION ON EACH EMPLOYEE

- ✓ Address
- ✓ Home and cell phone numbers
- ✓ E-mail address
- ✓ Social security number
- ✓ Next of kin name(s)/contact info
- ✓ Medications

## BANK INFORMATION

- ✓ Account numbers, authorized signatures, certificates of deposits, and/or other investment documents

## INSURANCE POLICIES

- ✓ Nature and extent of coverage, carrier, and policy number
- ✓ Name(s) of agents with pertinent contact information
- ✓ Any reporting deadlines

## VENDOR LIST

- ✓ Pool maintenance, security, landscape maintenance, roofer, etc.
- ✓ Professionals - CPA, Insurance Agent, Attorney and Manager

## INVENTORY OF FURNITURE AND EQUIPMENT

- ✓ Detailed descriptions
- ✓ Photographs (update annually)
- ✓ Receipts
- ✓ Serial numbers

## EMERGENCY SUPPLIES

- ✓ Emergency medical supplies, food, water, waterproof matches, a defibrillator, flashlights, battery-operated radio, an emergency generator and an ample supply of fuel to power the generator for an extended period of time.
- ✓ Tools, such as shovels, crowbars and a power saw, might be considered.

## BUILDING PLANS

- ✓ A set of as-built plans and specifications.
- ✓ Location of shut-off valves and structural components
- ✓ Names, addresses, telephone numbers and e-mail addresses of the architects, engineers, contractors and sub-contractors who designed and built the structures.

## BUDDY SYSTEM

- ✓ Let a neighbor or the property manager know if you will be away from your unit/lot for an extended period of time
- ✓ Make sure residents who might need special assistance are identified

## DATA INVENTORY

- ✓ Maintain a record of information maintained in the community's information systems.
- ✓ Regularly back up all data to a safe and accessible location off association property..

Disclaimer: This Quick Reference List has been provided solely as a courtesy for users' convenience. Becker provides no guarantees or warranties of any kind, including but not limited to, any guarantees or warranties that this List is comprehensive, complete, suitable for a particular purpose, accurate, and/or adequate to address a particular matter.