

## RESERVE STUDY UPDATE

(with no site-visit) for continuous BRG clients only

Information required to begin

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**Association Name**

**Manager or Contact Name**

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### 1. Last year ending reserve fund balance

*Fill in the blank or simply provide last year end audit, review, compilation or financial statement. This information must be provided, even if the association does not meet the threshold for having an audit or review completed.*

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### 2. Current year annual reserve contribution

*Fill in the blank or simply provide the current year budget.*

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### 3. Reserve expenses since last Reserve Study and anticipated this fiscal year.



**CHECK HERE if the association has NO reserve expenditures.**

BRG Component Number	Reserve Item Description Including Scope of Work	Cost	Fiscal Year
1000-100 from study	Example: Resealed all paving Include scope details if different than study's scope!	\$9,999.99	2020/21

*In context of the existing reserve study, list (or attach) reserve expenditures and include scope of work. Describe components utilizing their number from the prior year's reserve study. It may be simplest to copy our Section II, Expense Forecast, and highlight, circle or mark-up the previous stated projections. GL's should only be provided if they are richly annotated with notes relating to distinct components and well defined scopes of work. GL's without significant annotation do not work.*

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### 4. Next fiscal year MONTHLY assessment (if known)

With the above information provided to BRG, we can update a **BRG** existing reserve study only and execute the California Assessment and Reserve Funding Disclosure Summary. If the association has used another firm for the previous study, please contact BRG for assistance and pricing.

**\$300 minimum charge for reserve study update, and only if an existing BRG continuous client. Please inquire for your fee.**

Please reply to Browning Reserve Group.