

Introducing Another Way to Manage Communities

The Hybrid Approach

Community management has always been a balancing act. Boards and managers often find themselves choosing between options that don't quite fit their community's needs.

On one end of the spectrum, full self-management can quickly overwhelm volunteer boards. On the other, full-service management may feel excessive or costly. And for many communities, asking a manager to handle both day-to-day operations and complex accounting creates inefficiencies and risk.

That's why a new option has emerged: hybrid management.

■ What Is Hybrid Management?

Hybrid management combines the strengths of professional accounting with modern community management tools. With this approach, the accounting is handled by experts, while boards and managers maintain control over daily operations.

Through a streamlined software platform, communities can manage violations, ARC requests, maintenance, communications, and document storage in one central location—all while knowing their financials are accurate, compliant, and professionally maintained.

■ Who Benefits From This Approach?

Volunteer Board Members

Boards gain peace of mind by outsourcing financial management to experienced professionals. This means fewer late nights

A 3rd Option

OPTION 1
100% Self Managed

OPTION 2
Full Management



reconciling financials and greater confidence in compliance, reporting, and transparency.

Property Managers

Managers can focus on serving their communities instead of juggling bookkeeping or hiring in-house accounting staff. With financial tasks taken care of, managers can dedicate their time to resident relations, maintenance oversight, and vendor coordination.

Why Hybrid Management Works

For boards, hybrid management offers flexibility and oversight. You remain in control of daily operations while outsourcing the most time-intensive and specialized function: accounting.

For managers, it eliminates the burden of financial administration. No need to train or supervise accounting staff—the system integrates seamlessly, allowing you to focus on physical management.

A Smarter Way Forward

Hybrid management provides communities with the best of both worlds: professional financial support and the ability to maintain hands-on involvement in day-to-day operations. It is a balanced, cost-effective solution designed for modern community needs.

“A big thank you to you and your team. I was nervous and apprehensive about moving, but each and every one of your team members that I have interfaced with has been outstanding at every corner and has made this transition flawless. They are all very professional, knowledgeable, very responsive, and extremely good at what they do!” —Annie S., Manager



SERVICES

Don't want to spend hours on community accounting, administrative & communication chores?

Our solution makes it easy AND we do a lot of the work so you don't have to.

Whether you are:

- Self-managed but looking for an easier way
- Have onsite staff and looking for an integrated accounting and management system
- Working with a manager to handle the physical management with a separate accounting service
- A manager who doesn't want to do the accounting



We can help with the following:

■ Monthly Accounting

- Collect Homeowner Payments
 - Emailed or Mailed Statements
 - Pay Online or by Check
 - Enforce Late Fees
- Pay approved Bills Quickly
- Provide Financial Reports On Time



■ Administrative Support

- Send out Your Mailings
- Estoppels & Refinance Paperwork
- Annual Corporate Filing

■ 5 Star Service

- Dedicated Board Client Manager
- Specified Response Times
- Homeowner Support
- Value Guarantee

“Working with Community Financials has been a game-changer for our HOA. After partnering with three other companies in the past, we can confidently say there is no comparison - Community Financials sets the standard for service and support in this industry. Their team is consistently responsive, knowledgeable, and genuinely committed to helping our board succeed. Their attention to detail is exceptional, and their willingness to go above and beyond has made a significant difference in how effectively we manage our community. In addition to supporting our board, the member portal has been a hit with our residents. It is user-friendly and the customer support provided to our membership has been equally impressive. We are 100% satisfied and truly grateful to have found a partner like Community Financials.” —Mike D., HOA President



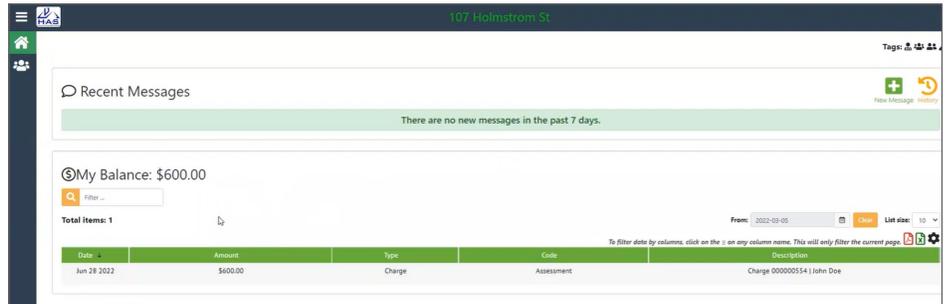
SYSTEMS

Financial information and transparency allow for cost control, homeowner trust and convenience. Plus, we provide a suite of tools to help you operate your community that are EASY to use.

Boards, committees, onsite staff and managers get access to information and tools to make things easier and save time. Plus owners get to a portal and smartphone app to access information specific to them.

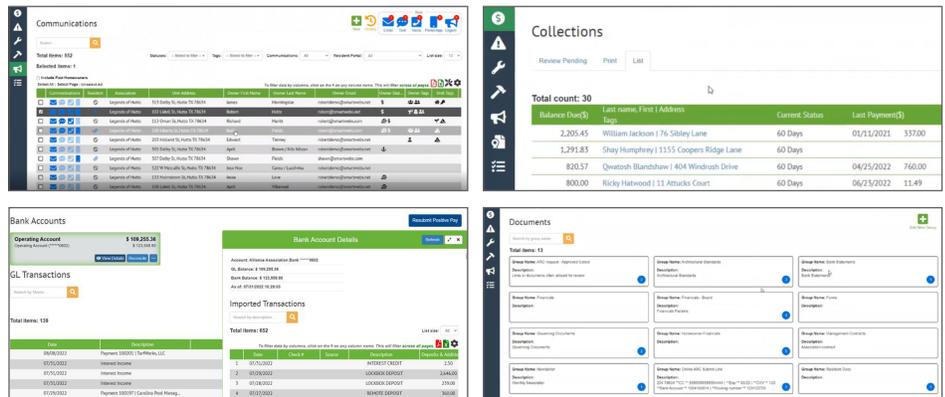
Homeowner Portal

- See Charges & Make a Payment
- See Documents
- Contact Board



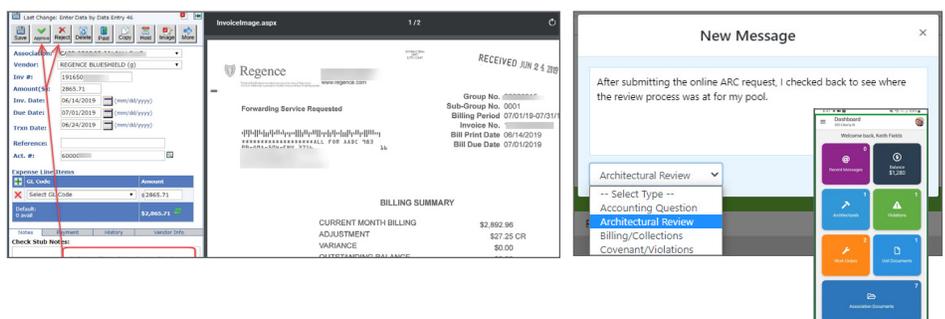
Board & Manager Portal

- Accounting Reports & Banking Info
- Communication Tools
- Document Storage



Additional Tools

- Approve bills online
- Maintenance, Violations & ARC software
- Smartphone app



“ We have been working with Community Financials for three years. I feel like I have an excellent window into our finances. Their online portal provides 24/7 access to all of our banking data and I am able to generate accounting reports in real time. They have super responsive staff that is always willing to help with any questions that I have. I highly recommend them.”



—Norm H., Treasurer

GET STARTED:

1. Enter your confidential accounting activity on our [website](#)
2. Receive your proposal quickly

Key Activities for Operating your Community

Who Does What?

	Boards or Manager Typically Handles	Community Financials Handles	Other Experts Handles
FINANCIAL			
Bill & Collect Owner Dues		✓	
Send Late Letters		✓	
Work on Delinquent accounts/ Collections		✓	
Set up & Bill Special Assessments		✓	
Pay Vendor Bills		✓	
Produce Financial Reports		✓	
Online Portal to View Account & Pay		✓	
All Software Costs Included		✓	
ADMINISTRATIVE			
Resale & Refinance Administration		✓	
Mail / Email Community Letters	✓	✓	
Draft / Mail / Email Annual Meeting notices	✓	✓	
Newsletter Prep & Distribution		✓	
Lead or Attend Annual Meeting	✓		
Take Meeting Minutes	✓		
Violation & ARC Letters	✓	✓	
ADVISORY			
Guidance on Policies & Procedures		✓	
Guidance on Operational Questions		✓	
PHYSICAL MGT			
Source Vendors & Get Proposals	✓		
Supervise Work	✓		
Site Inspections	✓		
24/7 Emergency Ans Service & Dispatch Vendors		✓	
BY OTHER ADVISORS			
Answer questions on Governing Docs			Attorney
Review & Revise Governing Docs			Attorney
Review Insurance Coverage & Bid Out			Insurance Agent
Reserve Studies			Certified Reserve Spc.
Capital Improvement Projects			Project Mgr

“ I’m the Treasurer of an HOA and Community Financials helps our community with monthly accounting and provides responsive service since January 2023. They allowed us to be free of posting for our community. We can upload all information on our community portal so all residents are able to access. As volunteers it saved us time, money, helped control costs, improve financial information, faster service, peace of mind. Remember when you are a Board Member it is strictly voluntary... the team at Community Financials are the best!” —Antony M., Treasurer

