

TEAM BRIEFING

Trusted Expertise in Association Management



Burnt Store Marina Golf Course Named #2

Every year, NBC’s Golf Pass conducts the **Golfers’ Choice: Top 25 Most Improved Courses**. We are excited to report that SWFL’s very own Burnt Store Marina Country Club (BSMCC) earned the #2 spot for 2021! These rankings are determined by golfers’ ratings over the course of the year. All 25 earned significantly higher ratings in 2021 than they did in 2020. The general consensus amongst golfers was that BSMCC had “amazing improvement”, and the recent reviews are a definite reflection of this. The 27-hole executive course continues to receive 4 and 5-star ratings from golfers. Originally constructed in 1988 under Ron Garl’s expertise, Burnt Store Marina Country Club has worked steadily at improving the course since 2020. Congratulations! Alliant is honored to be a part of your beautiful community.



Photos courtesy of the Burnt Store Marina CC website

INSIDE THIS ISSUE

- Millie’s Message 2
- Going Above & Beyond 3
- Guest Visitor at Alliant 3
- Alliant Vendor Trade Show 4-5
- Board Officer Roles: What Exactly Does the Treasurer Do 6



Welcome to Alliant!

The following communities recently joined our portfolio:

- Ironwood, Inc.
- Marco Towers (M.T. Club, Inc.)
- Partridge Pointe Condo Assn.
- Tuscany Pointe Community Assn., Inc.
- Rivers Edge I Condo Assn.
- Waterways of Naples HOA
- The Tides at Pelican Landing Condo Assn.



Millie's Message



Dear Clients and Friends:

My focus on this Spring-Time newsletter is going to be about "Celebrating Volunteers".

The busy winter season is over, and we are enjoying a delightful Spring. If you are in Florida, then you know what I'm talking

about: blue skies, clean fresh air, sunshine, and perfect temperatures. What more could we want???

As you venture out of your home and travel through your community you see people walking dogs, bike riding, jogging, pushing babies in strollers, and sometimes dogs in strollers. There's action on the pickle ball and tennis courts, and you may spot one or two people out roller blading or skating. Life here in Florida seems to be pretty good. That doesn't mean we Floridians are oblivious to what goes on outside our state. Not at all. We simply appreciate, enjoy, and take advantage of life in the sunshine state. Floridians come from all over the USA, and from around the world. Every day, we hear of more, and more people moving to the sunshine state, so something must be good here to attract residents and visitors.

Floridians, full time and/or part time, are generous people who give back to the community, by volunteering personal time, money, and personal possessions to so many worthy local causes. In the Alliant newsletters you will see Alliant staff going above and beyond when it comes to volunteering and helping local charity organizations. They can't do enough, and their time and actions are always appreciated.

When it comes to volunteering time, no one out does a community Board Director (BOD). I am grateful for the relationships that the Alliant team has built with the board directors that we work with. Board Directors work so hard, get paid zero, put in many volunteer hours each month, are at times unappreciated, and get singled out when

disagreements occur. Board Directors legally have a Fiduciary responsibility for running a successful community, to uphold governing documents, maintain all common areas, collect dues, create, and establish a functional budget, resolve disputes, procure vendors, and in general, maintain the overall look and safety of the community. They work closely with the management company team, who is there to assist and guide the BOD in accomplishing the day-to-day business. But in the end, all responsibility is on the Board. You really must like what you're doing to work so hard for so little in return. If you're like me, you love living in a community for so many reasons, and we might never give a thought to who makes it all possible. Communities offer so many amenities that we have come to love and enjoy. All these amenities are maintained by the BOD. Sure, they don't physically maintain them, but they make the decisions to be certain that someone does. And community volunteers don't stop with the BOD. Oh, no. Many communities have committees and lots of committee volunteers.

Join me in saluting all Volunteers for all their time, hard work, generosity and caring about others. I am proud to know you.

As always, our commitment and promise to provide the best service possible for our clients never changes. We are here for you. Even when we place incredible responsibilities and demands on our team to support critical services in a highly dynamic environment, the Alliant team meets the challenge, and will continue to do so. We thank you for entrusting your business to us or considering our services for the future.

Stay safe and healthy!
Millie K. Strohm,
President & CEO

Our annual Alliant Vendor Event is one of the ways we say "thank you" to all of the volunteer board and committee members we service.
See pages 4 & 5.



Going Above and Beyond

We often receive notes of praise for one employee or another. It makes our day when a kind word comes across our email (usually from a board or committee member) and we always pass along the compliments to the staff.

Recently we received a letter in the mail from a renter in one of the associations we manage, Loggerhead Cay. This renter had lost their cat prior to returning back up north. They had to leave without their favorite feline and had resigned themselves to never seeing her again. Our staff, Yolanda and Mike, sprang into action. Low and behold, they actually were able to locate the cat and use a live trap to retrieve her. She was reunited with her family a few days later. The renter was thrilled and wanted us to know the lengths Yolanda and Mike went through to make sure this story had happy ending.

We know our employees do great things and many go above and beyond the call of duty. But it's great to know that others recognize that as well.



Pictured Above Right: Yolanda and Mike - Loggerhead Cay Team and Cat Wranglers Extraordinaire!

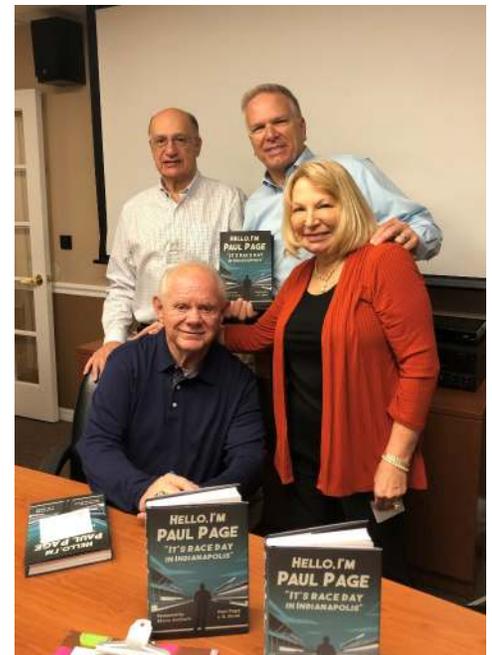
Guest Speaker at Alliant

Alliant is fortunate to manage many associations. One such association happens to be the home of Paul Page. Paul and our owners have developed a friendship over the years, so he was quick to say “yes” when asked to come speak to our staff. Paul Page is known as the Voice of the Indy 500. Along with his illustrious career in the motorsports broadcast

business, he enjoys sharing stories detailing various incidents and milestones that helped shape and define his career.

One morning in February, Paul regaled our staff with story after story. Many were humorous; most had a hidden lesson in them if you paid close attention. He also gave out copies of his recently published book, which he patiently signed for all of those who wanted.

Thank you to Paul, and his wife Sally, for providing a morning not soon to be forgotten! We were thrilled to have them visit.



Alliant Vendor Trade Show Returns!

After a two-year hiatus (thank you, Covid) our Annual Trade Show returned to the Alliant parking lot. Lots of vendors. Lots of board & committee members. Lots of prizes. Lots of food...and beverages. Lots of tropical blue shirts (in fact, a sea of them) as most of our employees were out and about as well. All of us here at Alliant would like to thank everyone who attended the fun-filled day. We look forward to next year!





Board Officer Roles: What Exactly Does the Treasurer Do?

All members of the board are responsible for the association's overall financial health; but the Treasurer has specific duties to protect the association's assets. These duties, and the authority to exercise them, are found in the association's governing documents and also in the Florida statutes. It's a big responsibility. Sometimes the Treasurer has the benefit of a finance committee to help review financials, budgets and the overall finances of the association and make recommendations accordingly. Regardless, with the help of a qualified CAM and/or management company, the Treasurer can be relieved of many of the day-to-day tasks and details and instead focus on the oversight of the following duties:

Internal controls: Treasurers keep an eye on how the funds are being handled. For example, a Treasurer makes sure that the check matches the invoice and is coded correctly so that it is reflected properly in the financial reports.

Financial Reporting: Monthly financials are completed and reflect the income and expenses of the association. It is the Treasurer's responsibility to review these financials to ensure accuracy.

Budgets: Treasurers are responsible for preparing the annual budget. That doesn't mean they actually crunch numbers or develop spreadsheets, rather they work closely with the CAM or CPA to ensure the members' values, preferences and needs are reflected in the budget.

Audits: Association financial and accounting records need to be audited periodically. It's the Treasurer's job to ensure that a CPA undertakes this important activity at regular intervals.

Records: Treasurers maintain financial and accounting records, or see to it that they are securely and properly retained by the management company.

Insurance: Treasurers make sure the association has adequate insurance of all types: casualty, hurricane, worker's compensation, D&O and other necessary protections.

Investments: Treasurers are watchdogs for the association's investments. They make sure investments are sound and do not jeopardize principal. Boards generally have investment policies that guide their investment decisions, and it's the Treasurer's job to see that the policy is followed.

Assessments: Collecting assessments and monitoring delinquent accounts is typically a service provided by the CAM or management company. The Treasurer, however, keeps a close eye on the delinquencies and alerts the board to problem areas.

Reserves: Treasurers ensure that the association periodically conducts a reserve study and that it's adequately funded in the annual budget.

Taxes: The Treasurer is the board's liaison to the association's auditor and CPA. The Treasurer monitors the progress of the annual audit and makes sure the appropriate tax returns are filed on time.

In short, the association Treasurer's job is to maintain the integrity of the association's finances. It can be an Herculean responsibility, especially in the absence of a CAM and/or management company. Fortunately for the Treasurer, many associations realize the benefit of employing a management company to do all of the "heavy lifting".



Thank You to the Following Vendors for Supporting Alliant's "Feed Our Frontlines" Campaign



Thank You to the Following Vendors for Their Continued Support Of Habitat For Humanity



SIMONS LAW GROUP, PLLC
ATTORNEYS AT LAW

