

TEAM BRIEFING

Trusted Expertise in Association Management



Hurricane Ian - Take Note

It's been a little over four months since Hurricane Ian devastated SWFL. As we work alongside our boards in the recovery process, we try not to dwell on the disheartening circumstances.

However, we have come across some interesting facts and statistics with regards to Ian. While the list is long, we felt the following were noteworthy and help to put things in perspective:

- \$5 billion in federal assistance has been given out so far.
- 911,000 households registered for assistance with FEMA.
- An estimated 33 million cubic yards of debris has been collected.
- There are \$53-74 billion in insured losses from Florida to the Carolinas.
- Florida's agriculture incurred as much as \$1.8 billion in damages.
- Rainfall totals in most Florida cities or towns ranged from 10-20 inches. Titusville recorded the highest total with a record 26.42 inches.
- As many as 7,000 boats were damaged or misplaced.
- 97% of the buildings on Fort Myers Beach were damaged or destroyed altogether.

Credit: The News-Press (January 19, 2023), Disasterphilanthropy.org, and Britannica.com

Moving on to something positive, which we also feel is quite noteworthy...

124 TOYS COLLECTED!



We'd like to recognize our fellow vendors, colleagues and friends for their donations to our Toys for Tots campaign this past holiday season. Without them, we never would have surpassed our goal (100)!

- Extreme Painting & Restoration
- First Service
- Personal Touch Landscaping
- Elias Brothers Group
- Estate Landscaping & Lawn Management
- Florida Paints
- Northwest Exterminating
- Jackie & Chuck Roney
- Faithful Few USMC
- Anonymous Owners from Majestic Palms



INSIDE THIS ISSUE

Toys for Tots	2
Employee Spotlight	3
Welcome to Alliant	3
Record Retention: What Needs to Stay, What Can Go	4





Extreme Painting & Restoration



First Service



Elias Brothers Group

We also want to give a big THANK YOU to the Alliant Team, many of whom donated toys, helping us to reach 124!



Personal Touch Landscaping



Estate Landscaping & Lawn Management



Florida Paints



Faithful Few USMC



Jackie & Chuck Roney



Northwest Exterminating



Employee Spotlight: Zoe Printz, CAM, Fort Myers Operations Manager



Zoe Printz began working at Alliant in September of 2015. She caught on quickly to the Alliant culture and soon found herself as an operations manager in the Fort Myers division. Prior to Alliant, Zoe was in the hospitality industry. She graduated from FGCU during the Great Recession with a bachelor's degree in Communication & Marketing, and jobs were scarce for anyone fresh out of college. She worked restaurant management and bartending for about 10 years. That experience would end up providing an excellent background for working in the association management industry. She excels at multi-tasking in a fast-paced environment, dealing with people of all different personalities, and communicating with her boards and owners.

Zoe Printz is a true SWFL native, growing up on Fort Myers Beach until moving into Fort Myers when she was in her teens. Not many people can say they grew up living on a sailboat, except Zoe who spent her first six years living on the water at what used to be Mid-Island Marina (now Snook Bite). Ironically, this Florida girl does not like seafood.

Zoe and her husband have been married 15 years. They tied the knot on Fort Myers Beach at The White Whale, which was recently wiped out in Hurricane Ian. She has two very energetic, young kids who keep her moving and on her toes. While not at work, she enjoys watching her kids play sports, playing with her kids outside, saying "yes" to whatever shenanigans her friends contrive, boating, trying new restaurants, and binge-watching mindless TV.

Board Certification Classes:

Please note the dates for our
2023 Board Certification Classes:

Thursday, February 16th

Online Only

Friday, March 3rd

In-Person Only

Wednesday, March 29th

Online Only



**Please keep an eye out for emails
inviting you to register!**

Welcome to Alliant!

**The following communities recently
joined our portfolio:**

Golden Beach Townhouses POA

Moonshadows Property Owners Assn.

Pine Grove Homeowners Assn.

Pinewood Condominium of Lehigh Acres

Poinciana Condominium Assn.

Seawind Condo Assn. of Sanibel Island

Seawind II Homeowners Assn.



Record Retention: What Needs to Stay, What Can Go

With the advent of technology, computers and the ability to create digital files, the need to house mountains of paperwork has dwindled immensely in all industries. What would once take up a warehouse full of boxes now fits nice and neat on a thumb drive the size of, well, your thumb, or a folder on a server in a “cloud” taking up no physical space whatsoever.

Florida Statutes dictate record retention for associations and should be referred to when looking to dispose of, reduce or consolidate the multitude of records that can accumulate over time.

As a board, you should be aware of the amount and types of official records that are housed by your management company or on-site at your association. It is a good idea to review these records periodically and clean out those items that are no longer needed and can be disposed, of per Florida Statute.

The following list is a cheat sheet for historical records and their rate of retention and disposal.

Permanent Records

These records (whether paper or digital) need to be maintained as long as the association is in operation:

- Governing Documents (CC&Rs, Bylaws, Articles of Incorporation, parcel maps, amendments, current Rules and Regulations)
- Deeds to property owned by the association
- Architectural plans
- Plans, warranties, specifications, permits and other items related to the construction or improvement of common grounds.

Records Retained for Seven (7) Years

These records should be maintained for a minimum of seven years:

- Minutes
- Financial & Accounting records, such as budgets, monthly financials, year-end financials, general ledgers, AP, AR, bank statements, reconciliations, invoices, purchase orders, tax returns, etc.
- Insurance records & policies
- ARC/ARB submissions
- Closed litigation files
- HR records

Records Retained for One (1) Year

- Election materials
- Bids from contractors/vendors



Exception to the Rule:

If a board member or manager believes that the record is relevant to a current litigation matter, or potential litigation, then the association must preserve the record until the association’s lawyer determines that the record is not needed.

If there is a question as to the importance of a document or record, always err on the side of caution and retain that record until such time it is deemed ok to be disposed.

If your permanent records are in paper format (hard copy), it is a good idea to have them digitized. Although this can be costly or time consuming upfront, the investment will likely save you time, aggravation and expense in the long run as files will be more easily accessible once they are digital.

Keep in mind, the more organized your historical files are, the easier it is to review and purge when the time comes.

Compiled from multiple sources

