

FIRSTSERVICE FINANCIAL HIGHLIGHT REEL - OCTOBER 2020

CASH MANAGEMENT

Villages at Rancho El Dorado – Maricopa, AZ (Assisted by Shauna Richards): Increasing portfolio's average interest earned by over \$5,100 (19% increase).

La Galleria – San Francisco, CA (Assisted by Mariana Salfiti): Increasing portfolio's average interest earned by over \$4,900 (105% increase).

Parkview Meadows – Eastvale, CA (Assisted by Genevieve Ginelsa): Increasing portfolio's average interest earned by over \$1,900 (868% increase).

Mirasol HOA – Las Vegas, NV (Assisted by Barbara Holland): Increasing portfolio's average interest earned by over \$3,400 (2273% increase).

Highlands at Mayfield Ranch – Austin, TX (Assisted by Lakeesha Flemming): Increasing portfolio's average interest earned by over \$4,200 (1034% increase).

2601 Parkway Condominium – Philadelphia, PA (Assisted by Angela Nordstrom): Reallocated \$3,508,944 to help the community earn an additional \$1,715 in annual interest income.

Frontier East and West Condominium – Silver Spring, MD (Assisted by Staci Gelfound): Reallocated \$467,264 to help the community earn an additional \$3,369 in annual interest income.

The Saxony Cooperative – Washington, DC (Assisted by Christopher Froehlich): Reallocated \$617,213 to help the community earn an additional \$4,104 in annual interest income.

Lenox Station Condominium Trust – Norwood, MA (Assisted by Laura Schmitt): Reallocated \$259,185 to help the community earn an additional \$1,688 in annual interest income.

Bulle Rock Community Association – Havre De Grace, MD (Assisted by Jeff West): Reallocated \$3,552,148 to help the community earn an additional \$4,598 in annual interest income.

Seminary Walk Condominium – Alexandria, VA (Assisted by Marck Rossy): Onboarded new client and increased total interest income by over \$6,000 per year.

Summerwalk at Stone Ridge – Stone Ridge, VA (Assisted by Michele Meidling): Reallocated reserve balances to increase interest income by 200%.

Kirkwood Circle – Kansas City, MO (Assisted by Liz Johnson): Invested brokerage cash and increased reserve interest income by \$7,200 per year.

Kew Gardens Terrace – New York, NY (Assisted by Amanda Mercado): Invested refinance proceeds and helped client generate an additional \$21,000 per year in interest income.

720 Gordon Terrace – Chicago, IL (Assisted by Chris Bakos): Proactively identified opportunity for client to earn an additional \$5,700 per year in interest income.

Ontario Street Lofts – Chicago, IL (Assisted by Eric Ruby): Board approved reallocating funds into banks that would generate an additional \$10,000 per year.

360 Riverside – New York, NY (Assisted by Mitch Lassman): Increased interest income by almost \$3,000 per year on reserve funds.

The Cocoa Exchange – New York, NY (Assisted by Mitch Lassman): Increased interest income by almost \$3,500 per year on reserve funds.

50 East Chestnut – Chicago, IL (Assisted by Rose Rogic): Reinvested maturing CDs into new accounts earning the client an additional \$4,000 per year.

Vineyards at Piney Orchard – Odenton, MD (Assisted by Erica Cartwright): Locked in CD yields to ensure interest income maintained at current levels through 2021.

Catalpa Gardens – Chicago, IL (Assisted by Shonda Lovejoy): Identified opportunity to increase interest income by over \$3,000 per year.

Chancery Condo of Kingstowne – Fairfax, VA (Assisted by Jennifer Brymer): Reinvested maturing CDs into new account generating an additional \$1,000 per year.

INSURANCE

Avenue Lofts – Fort Lauderdale, FL (Assisted by Angela Issman): Saved the association \$17,000 on renewal program.

Estates at Kingswood – Fredericksburg, VA (Assisted by Michelle Weisbrod): Partner broker provided a marketing summary which confirmed the renewal premium was competitive, so the association renewed.

Trails at Beech Creek – Aberdeen, MD (Assisted by Donna Sullivan): The association needed a D&O policy placed immediately as the incumbent carrier allowed the policy to cancel. Partner broker provided a quote and replacement coverage was bound in only two days.

Blooms Crossing – Manassas Park, VA (Assisted by Noel Arevalo): After we provided multiple options with enhanced coverage and met with the board to review our process and their insurance placement, the association chose to renew with a partner broker, thus increasing their Umbrella liability limit.

The Hamlet HOA – Limerick, PA (Assisted by Krista Welsch): After the manager requested a mid-term quote because communication with previous agent was challenging, the association switched to a partner broker, receiving better coverage at a great rate.

Park at Courthouse UOA – Arlington, VA (Assisted by Shalonda Jones): Partner broker marketed the account for the renewal and the association obtained \$17,000 premium savings, Extended Replacement Cost, and lower Flood and Earthquake deductibles with higher limits.

Blue Bell Country Club – Blue Bell, PA (Assisted by Yvonne Newman): Broker partner negotiated a \$12,000 premium savings compared to the initial renewal premium that the incumbent carrier offered (representing a \$6,000 in savings when compared to the expiring premium).

Seminary Walk Condominium – Alexandria, VA (Assisted by Marck Rossy): The association received premium savings of \$16,000 with Extended Replacement Cost, a higher Umbrella limit and Flood and Earthquake coverage which was previously excluded.

Longview POA – Waxhaw, NC (Assisted by Alexis Fidler): Partner broker provided enhanced coverage including Workers Comp, increased Crime limits from \$25,000 to \$1,400,000, and Umbrella, all with a reduction in premium.

Upland Hills – Upland, CA (Assisted by Monica Munoz): Partner broker was able to offer higher building limit, broader form, added Workers Compensation and increased Umbrella from \$2,000,000 to \$15,000,000, all while saving the client \$16,000 annually (approximately 21%).

Carefree Ontario – Ontario, CA (Assisted by John Marquez): Broker partner was able to bring much broader coverage including Guaranteed Replacement Cost for building while saving \$7,100 annually.

The Row and Bungalows at Terra Vista – Rancho Cucamonga, CA (Assisted by Stephanie Otto): Broker partner was able to bring better coverage, including Employment Practices Liability coverage and defense outside the limit for D&O while saving approximately 10% annually.

Calavera Hills Master Association – Carlsbad, CA (Assisted by Vanessa Deffenbaugh): Broker partner was able to bring Guaranteed Replacement Cost and broader coverage and save the client almost 20% annually.

Brownstone Square – Marietta, GA (Assisted by Caren Browne): Broker partner was able to save the association over \$32,000 over the renewal premium while adding Guaranteed Replacement Cost, Workers Compensation coverage and lowering Property, Crime and D&O deductibles.

LENDING

\$7,500,000: Independence Harbor – NJ (Produced by Dave Calloway)

\$5,500,000: Collect Pond House – NY (Produced by Jessica Watters)

\$2,000,000: Adalia Bayfront Condominium – FL (Produced by Vernon June)

\$1,100,000: 220 East Walton – IL (Produced by John Santoro)

\$1,000,000: Flora Ridge Condominium – FL (Produced by Johana Angarita)

\$700,000: Boulder Pond HOA – MN (Produced by Maggie Mahmood)

\$500,000: Schaefer Landing North – NY (Produced by Stephen Labarbara)

\$500,000: 389 East 89th Street Condominium – NY (Produced by Frank Yurasits)

\$500,000: Bonita Beach Club – FL (Produced by Karen Dickens)

\$500,000: Bonavista Condo – FL (Produced by Mark Zitser)

\$496,000: Chasewood Oaks Condominium Association – TX (Produced by Tamara Moore)

\$400,000: Gleason Farms Carriage Homes Association – MN (Produced by Paul Lawson)

\$200,000: The View at Bethany Bay – DE (Produced by Linda Mazzares)