



Deerfield Plantation 2 **PROPOSAL** 2022

Trusted Partner in Community Management



A STRONG COMMUNITY PARTNERSHIP, BUILT ON **INTEGRITY & TRUST**

Kuester is a locally owned family business that has been helping to create communities that withstand the test of time for over 40 years.



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KUESTER MANAGEMENT GROUP



For over four decades, Kuester has been a trusted name in the Carolinas. As one of our region's leading association management companies, we provide a full range of community management services. The breadth and seamlessness of our capabilities, along with our expertise, allow us to provide customized solutions to Builders, Developers, Board Members and various types of community associations.

Faison Kuester founded Kuester in 1975 and the company has grown over the years to encompass four independent organizations: Kuester Development Services, Kuester Commercial Real Estate, Metrolina Maintenance Group, and Kuester Management Group.



Kuester Management Group is based in Fort Mill, SC and partners with over 175 communities located in three states. We pride ourselves on providing the convenience and agility of a local business, backed by the reliability and resources of a large regional company. In an effort to build strong local relationships with our partner communities, Kuester currently has four regional offices throughout the Carolinas: Myrtle Beach (SC), Wilmington (NC), Davidson (NC), Boone (NC).

Our years of deliberate growth has resulted in a firm that specializes in building long term relationships. We approach every project with our full commitment to service which brings lasting value and peace of mind to the communities we manage. Kuester prides itself on offering "best in class" HOA management services by ensuring that homeowners can enjoy their community while optimizing their property value. This style of community management is designed to foster an environment for the best quality of life. Our goal is to handle the details so that you (the Board) do not have to. We understand the importance of providing superior service to ensure the success and longevity of the communities we manage.

From accounting and information technology to landscaping and building maintenance, we have a deep, proven knowledge base from which to provide unparalleled HOA management services.

**“The future of any company is greatly determined
by their performance in the past.”**

—Faison S. Kuester, Jr.

VISION. MISSION. VALUES.



Accountability

Taking ownership for your duties and responsibilities eliminates inefficiencies and increases team productivity and cohesiveness. Accountability builds trust both internally and externally.



Leadership

The success of our company and our partner communities depends on our ability to lead and inspire people towards achieving common goals.



Professionalism

Professionalism is key to our team's ability to build initial client confidence in our company. Companies that are able to provide a professional image combined with quality service are able to attract and retain clients and employees.



Teamwork

To be the most effective in the workplace, a company must build a team of interconnected people that moves together towards common goals. When a team performs well together, they accomplish more than individuals can do alone. (One Team, One Dream)



Service

Providing excellent service results in positive statements about our company expressed by our clients, vendors, employees and our surrounding communities. Our ability to provide exceptional service is essential to creating longterm relationships built on loyalty and trust.



Trust

Trust gives rise to a culture of support, confidence, and security, which increases productivity and overall job satisfaction.

WHY KUESTER?



THE KUESTER FAMILY

Kuester has been a trusted name in the Carolinas for over 40 years.

For more than four decades, the Kuester family has created value throughout the Carolinas. We take great pride in being one of the region's leading association management companies, providing a full range of community management services. Our breadth and seamlessness of our capabilities, along with our deep expertise, lets us provide customized solutions to builders, developers, board members and all types of community associations.

Kuester offer the convenience and agility of a boutique real estate services firm, but with the reliability and resources of a regional company.



“ At Kuester Management Group, our success is measured by how well we keep the promises we make. Real estate is a reputation business, and mutual respect is essential for success.

—Bryan Kuester

OUR TEAM

North and South Carolina community management best practices begin with Kuester Management Group. For years, HOA Communities have consistently turned to Kuester Management Group for access to superior vendors and around-the-clock maintenance services. Our team offers educational resources and deep insights into HOA governance, plus an unwavering commitment to the Community Association Management Industry of Best Practices.



Faison Kuester
CEO



Bryan Kuester
President



Karen McDonald
Vice President



Janice Roberts
Executive Director of
Operational Excellence



Karen Hults
Director of Finance



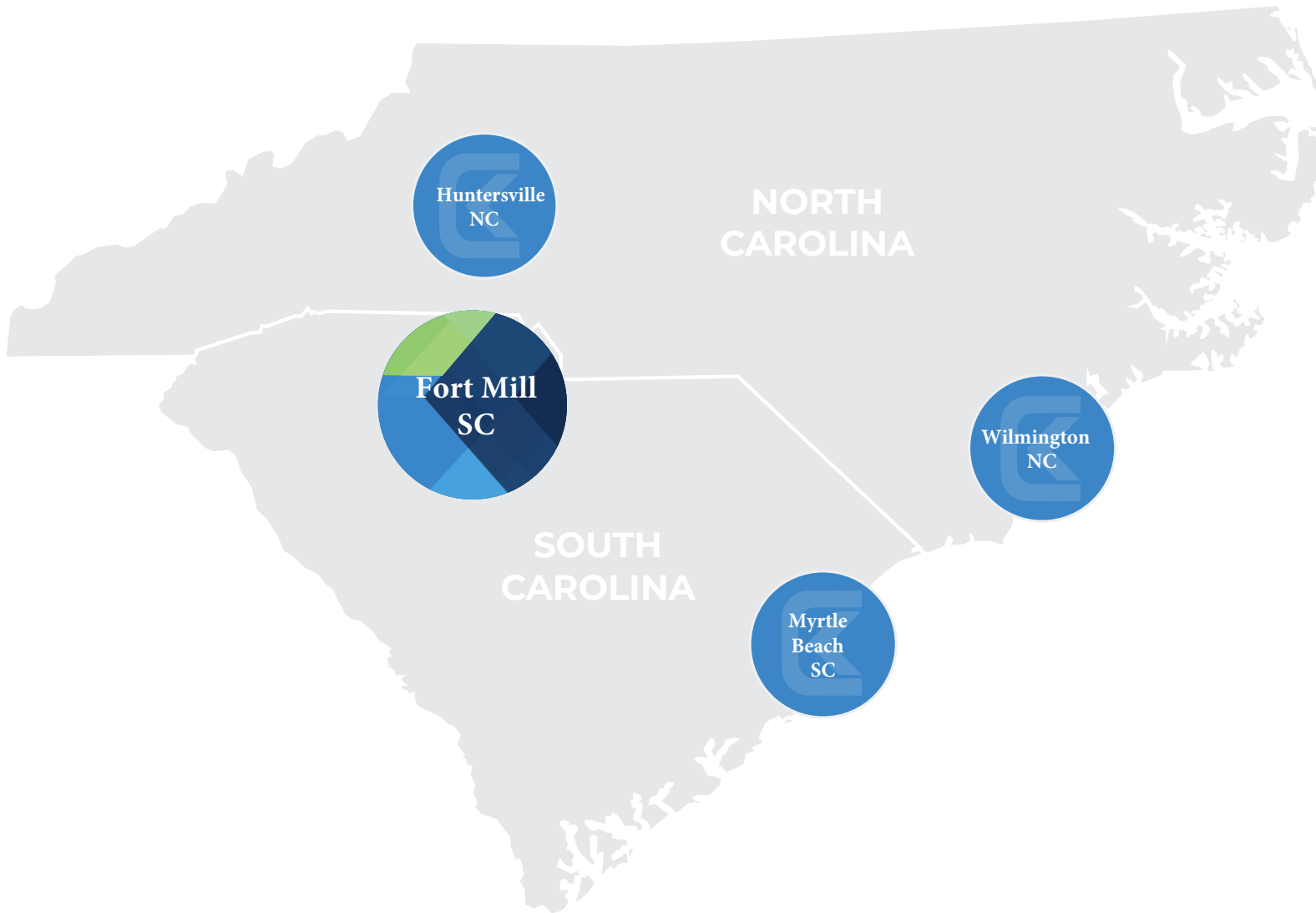
Chris Chaffin
Director of Management



Bryan Wilson
Director of Management

MANAGEMENT LOCATIONS

We are a family owned business large enough to provide the professional guidance and services you need, but local enough to build personal relationships with our clients.



Kuester offers the convenience and agility of a boutique real estate services firm with the reliability and resources of a regional organization. Decades of experience have given us access to a long list of professional resources you simply cannot expect from any other HOA management company in the Carolinas.

Your association will be supported by top industry accounting professionals. Our financial services include assessment & special assessment billing, delinquency enforcement & collection, annual budget preparation and strategic financial planning, as well as tax and audit coordination with a separate third party CPA Firm.

TEAM BASED MANAGEMENT

The Success Of The Communities We Manage Matters

At Kuester, we understand the relationship between providing superior service and ensuring the success and longevity of the communities we manage. That's why our long-term, highly-trained staff utilizes Community Association Institute's (CAI) best practices for HOA Management Services to quickly respond to and resolve the needs of homeowners and community board members. From accounting and information technology to landscaping and building maintenance, we have a deep, proven knowledge base from which to provide unparalleled HOA management services.



THE KUESTER DIFFERENCE

Looking for a professional management partner focused on building long term relationships?

The "Kuester Difference" features a team based management model paired with state of the art technology to provide your community with:

- **Transparent & Cohesive Web-Based Project Management**
- **Real-Time Access to Financial Records**
- **Certified Community Managers**
- **Highly Experienced Financial Management Team**
- **Local Homeowner Support Team**
- **Comprehensive Monthly Manager Report**
- **Client Service Response & Satisfaction Tracking System**

Professional Board Guidance by a Certified Community Manager



A partnership with Kuester Management Group guarantees your Board access to experienced Community Association Managers who are well trained and certified to provide the guidance you are looking for when striving to make the best decisions for your community. Specialized guidance is available in areas such as budget development, reserve study analyzation, key vendor recommendation, risk management and governing document modification.

Accrual Based Financial Management

One of an Association's primary functions is to maintain and operate property and facilities for the common benefit of the owners and residents. Without good structure and a solid financial plan many communities will not thrive. Kuester Management Group understands that accounting is one of the most important services we provide to a community, and therefore invests in great people and great "real-time" software to bring the most accurate accounting information to our partner Boards 24/7/365. From assessment billing and collection, invoice processing and long term financial planning we have your covered!



Emergency Repairs & 24/7/365 Emergency Maintenance

Our offices may close by five pm Monday through Friday, but we understand life in your neighborhood is going to continue twenty-four hours a day, seven days a week, three hundred sixty-five days a year. That's why we provide round-the-clock emergency repairs and maintenance to every association we manage. If you're experiencing a safety hazard or life-threatening emergency, by all means, dial 911. Otherwise you can rely on our team to assist you any time of day or night with a long list of maintenance issues including water damage and damages caused to homes, townhomes and condominiums by smoke or fire.



Best in Class Client Experience



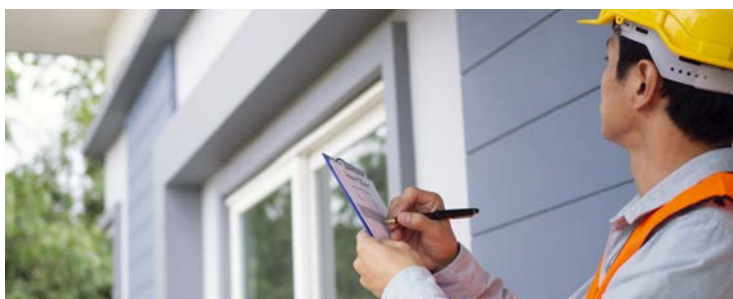
At Kuester, we understand the importance of making sure each homeowner interaction with our team is an exceptional experience. To ensure our valued clients receive immediate attention and resolution we have invested in a robust customer tracking system that provides real-time statistics on our team's performance and provide your Board a community specific report as part of your Monthly Management Report.

Proactive Property Preservation

At Kuester we understand the value of strong leadership and project management. After four decades of serving the Greater Charlotte area and the entire North and South Carolina region, we have the experience and connections you need to make the best decisions with vendors and contractors for your neighborhood. Let us make sure your property assets are properly preserved.



Consistent & Fair Covenant Enforcement



Our team of professionals will conduct comprehensive inspections of your entire neighborhood to ensure your community restrictions are being consistently enforced and your property values are preserved. Each inspection will be completed by one of our experienced professionals equipped with an iPad and marked company vehicle.

Secure Association Web Portal



At Kuester we understand that at the heart of a successful community is the ability for Boards to be transparent and provide regular communication with their owners. Keep your whole neighborhood connected with our secure web portal featuring real-time access to account information, community documents, amenity rentals, architectural applications, and important community information.

Well Organized Board and Annual Meetings

Successful community meetings require proper planning and execution. Our team will prepare meeting notices, agendas, informational packets and guide the Board through the full planning and execution of all Association meetings. With proxy recording, member sign-in, and presentation materials, we have you covered.



Board Member & Community Education



Kuester Management Group is an AAMC (Accredited Association Management Company). This is an elite designation issued by Community Association Institute (CAI) that less than 300 management companies worldwide have earned. As an industry leader our team understands the important role that CAI plays in developing the HOA service industry and is an avid supporter of both professional manager development and Board education. As a way to show our appreciation to our valued Board volunteers, we provide free semi-annual education workshops as well as private training sessions.



THE TRUSTED PARTNER IN COMMUNITY MANAGEMENT

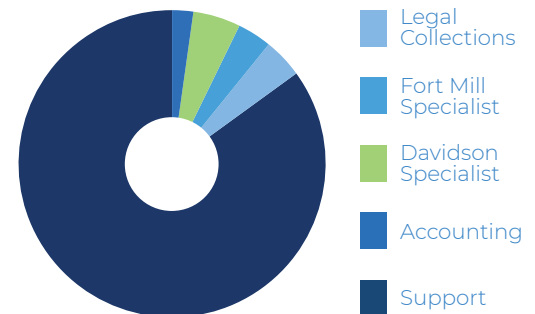
With decades of HOA management in several competitive markets throughout North and South Carolina, Kuester Management Group offers a comprehensive set of management options. Kuester unites years of experience with deep family roots in the Carolinas, and combines it all with an unwavering commitment to our HOA Management processes.

OUR NUMBERS SPEAK VOLUMES

Support Quick Stats



Tickets by Group



We represent and work closely with community association members to protect property values, and uphold the quality of their community. Our regional offices and our well-trained community management staff ensure that issues are resolved quickly so that homeowners can enjoy the benefits of their community throughout the year.

CUSTOMER REVIEWS

“ I have had the pleasure with working with Kuester Management Group for 3 years now and every interaction I have experienced with their team has been wonderful. They are professional, courteous and timely. I would recommend them to anyone who is considering them. They're the best!

—Monica Waugh

“ Kuester is absolutely wonderful !! So helpful,so friendly ALWAYS goes above and beyond to solve any issues that may arise. Great staff and company to work with!!! I highly recommend!

—Joleen Monroe

“ Every time I have contacted Kuester they have been so polite and helpful!

—Emily Usukhbayar

“ Having sent an email after office closing hours on a Friday, I was pleasantly surprised to have a quick response the same afternoon. My question was answered with speed and courtesy.

—Joleen Monroe

ACCREDITATION



Community Association Institute (CAI)

Experts who work in association management are certified by the Community Associations Institute (CAI). It is Kuester Management Group's policy that all team members receive on-going continuing education. Our community managers attend advanced level CAI continuing education courses each year to ensure a higher standard of knowledge, experience and integrity.

Association board members have fiduciary responsibilities, which compel them to make decisions that can have profound financial and social impact on their neighbors. Receiving professional and accurate advice, guidance and training on issues, such as reserves, maintenance, insurance, budgets, governance, contract, the law and rules can make the difference between success and distress.

What is CAI?

The Community Associations Institute (CAI) is an international organization dedicated to building better communities and provides education and resources to community association leaders, professional managers, association management companies, and other professionals who provide products and services to the industry.

With more than 310,000 members, CAI works in partnership with 60 chapters throughout the U.S., Australia, Canada, the United Kingdom, South Africa, and the United Arab Emirates.

CAI also advocates for legislative and regulatory policies that support responsible governance and effective management. They represent the interests of their members before the U.S. Congress, federal agencies, and other governing bodies on issues including taxes, insurance, bankruptcy reform and fair housing. In addition, state Legislative Action Committees represent CAI members before state legislatures and agencies on issues such as assessment collection, foreclosure, and construction defects.



Accredited Association Management Company

Kuester Management Group is part of an elite category of community association management companies who hold the Accredited Association Management Company (AAMC®) designation from Community Associations Institute (CAI). Worldwide, we are one of only 300 management companies who have earned this designation.

It's easy to become a community association management company. It's not easy to be an AAMC-accredited company. The following must be satisfied to earn the AAMC designation:

- The company must have provided association management services for at least three years.
- The senior manager must hold the Professional Community Association Manager (PCAM) designation.
- At least 50 percent of the company's managers must hold at least one of three credentials:
 - Professional Community Association Manager (PCAM), the pinnacle of professional achievement in the community association field
 - Association Management Specialist (AMS), a highly respected designation that many managers use as a steppingstone to the PCAM
 - Certified Manager of Community Associations (CMCA), a credential that recognizes individuals who have demonstrated the fundamental knowledge required to manage community associations

The AAMC requires an ongoing commitment to professional excellence. In order to retain the AAMC credential, companies must be dedicated to continuously providing professional development to their community management team. All credentialed managers must complete at least 24 hours of continuing education every two years in order to retain their designated credentials.



KUESTER SERVICES

At Kuester, we provide our partner communities with exceptional service through the combined use of technology and well-trained professionals.



**24/7
Homeowner
Access**



**Financial
Management**



**Association
Asset/Project
Management**



**Consistent &
Fair Covenant
Enforcement**



**Board/Association
Meetings**



**Board Member
Education**



**Customer Service
Satisfaction
Tracking**



**Serious About
Security**



**Community
Website
(Secure Portal)**

PROFESSIONAL ACCREDITATIONS



**Community
Association
Institute**



**Accredited Association
Management Company**

Quality HOA management requires behind-the-scenes education and training. This rigorous training helps managers keep pace with changing legislation and best practices to ensure that the communities they oversee receive the best possible service.

WE HELP BUILD COMMUNITY LEADERS

Kuester believes in the value of education and training. We are here to help grow and build leaders in your community by offering insight, tools, and training to community board members.

Our team of Community Managers are certified through Community Association Institute (CAI). We are also one of less than 300 community management companies worldwide to hold the designation of being an Accredited Association Management Company.

Being on your Board of Directors is certainly a great way to be an active leader in your community, but it is not the only way. There are many ways to serve and lead your community. To identify how you can best serve your community, start by thinking about your personal skills and availability and then talk to your community leaders to determine how you can best help. Maybe there is a particular committee that you are interested in, a special project that you can volunteer to help lead, or simply a task you can complete for community meetings or events.

However you choose to serve your community, the most important thing to remember is to lead by example. Actions are contagious and the decisions and actions you take will help form the expectations of your fellow community members and the overall sense of community within your Association.

Always do your part in fostering a strong sense of community by communicating with your fellow owners in a professional and courteous manner, be open to different points of views and always encourage feedback. Good communication and effective transparency are two key elements to being a successful leader.

If you are serving on your board, be transparent with your owners and share important information about your community with them. While certain information should not be shared for privacy reasons, successful boards are transparent with their membership whenever possible. Allow members to provide feedback and ask questions at open meetings. View presented questions and suggestions as insight to what the membership is expecting from your leadership and remember, owners that are interested in a subject enough to speak up at a board meeting or bring it to your attention are often those that you may be able to rely on to help you successfully resolve the issue.

OUR SERVICES DEFINED

24/7/365 Homeowner Access

Our team provides convenient 24/7/365 access for our homeowners through an online homeowner management portal that features real-time access to both homeowner accounts and association information. The portal features easy online payment options, access to community documents, amenity rentals, and much more. In addition, Kuester provides an online help center to assist homeowners with frequently asked questions.

Financial Management

One of an Association's primary functions is to maintain and operate property and facilities for the common benefit of owners and residents. Without good structure and a solid financial plan many communities will not thrive. Kuester Management Group understands that accounting is one of the most important services we provide to a community, and therefore invests in great people and great "real-time" software to bring the most accurate accounting information to the Board 24/7/365.

The Kuester accounting team will complete the following tasks for your community:

- Assessment/Special Assessment Billing
- Delinquency Enforcement and Collection Services
- Annual Budget Preparation and Financial Planning
- Management of Operating and Reserve Accounts
- Reserve Planning and Budgeting
- Processing of Owner Payments via Check, Online Check, Online Credit Card & Direct Draft
- Processing of all Association Invoices
- Accrual Based Monthly Financial Report
- Investment Assistance and Analysis
- Tax and Audit Coordination with CPA/Auditor
- Maintain and Secure All Community Records

Association Asset/Project Management

Kuester Management Group understands the value of strong leadership and project management. To ensure that our team is meeting the expectations of our partner communities, we utilize a comprehensive project management system that allows managers to easily track and monitor all association affairs on both current and future projects. This user-friendly system seamlessly facilitates communication between community managers and board members by providing a convenient communication portal that even allows for document sharing.

Kuester Management Group is experienced in guiding our partner communities through proper maintenance planning by implementing important tasks such as:

- Development and implementation of a maintenance responsibility chart for owners
- Development of both a short term and long-term maintenance schedule
- Completing a full documented inventory analysis of all association assets
- Development and implementation of both short term and long-term goal planning with the Board

Specific duties our team provides to our partner communities related to the maintenance of community assets include:

- Maintain approved vendor database
- Payment of Association operating expenses
- Vendor management through regular community inspections
- Same day response to homeowner inquiries
- Regular property visits to inspect condition of community assets
- Coordination of all Association projects, including solicitation, compilation, and presentation of competitive bid packages
- Assist Board with expense projection planning based on Reserve Study
- Complete risk management tasks on behalf of Association, including the soliciting and securing cost-effective insurance policies that properly protect Association assets
- Oversee all capital improvement and insurance claims on behalf of Association

Customer Service Satisfaction Tracking

At Kuester, we understand the importance of making sure all homeowners have an exceptional experience when interacting with our team. To ensure each and every homeowner need is met in a timely and satisfactory manner, we have a fully integrated customer ticket tracking system. The tracking system ensures each request for support receives immediate attention and resolution. This system assigns a ticket number to each homeowner email, phone call, or voicemail, allowing our team to track the ticket from start to finish. Upon completion of the ticket, the homeowner receives a survey that provides the opportunity to rate their experience with our team. Satisfaction ratings and response times are closely monitored to ensure that each homeowner receives an exceptional experience.

We're Serious about Security

Kuester understands the importance of protecting our client's information and in order to ensure our client information is highly protected, all community records are maintained within CINC Systems. CINC is a cloud-based Community Management and Accounting System that is hosted within an enterprise datacenter provider, Quality Technology Services (QTS). QTS Datacenters are manned and monitored 24/7/365. All records are backed up and replicated to QTS datacenters throughout the country.

Customized Solutions for Your Homeowners Association

We represent and work closely with community association members to protect property values and uphold the quality of their community. Our well-trained community management staff ensure that issues are resolved quickly so that homeowners can enjoy the benefits of their community throughout the year.



Community Website (Secure Portal)

Kuester provides our partner communities, free of charge, a secure community website that provides the following services to homeowners:

- 24/7/365 real-time access to their account balance and history
- Homeowner portal to verify and update personal contact information and make online payments
- Online access to community documents including: Covenants, Bylaws, Newsletters, Forms, etc.
- Electronic request forms for items such as clubhouse reservations, work orders, compliance issues, and architectural requests

Your community website also features a community calendar, photo gallery, community directory, and a “Community News” section to allow for regular communication with the homeowners and to help develop a sense of community within the neighborhood.

Additional value-add benefits for board members include:

- Financial Reports – Review comprehensive financial reports
- Architectural Review – Review, approve, deny architectural requests
- Security Access Rights – Provide admin access rights to select committee or board members

Consistent and Fair Covenant Enforcement

Kuester Management Group utilizes the CINC management system for compliance inspection and enforcement for our partner communities. This system provides online access for covenant violation letters for homeowners to view and respond directly.

The violation program allows owners to see their open violations on their personal web-portal and easily provide violation updates to our team. The system also allows our team to take a photograph of the cited violation and attach it to the letter generated within the system.

Board/Association Meetings

At Kuester we believe that the ability for our team to work cohesively with the Board of Directors is key to a successful Association. At the center of this relationship is your assigned Community Manager. In order to effectively understand the needs and expectations of each community we believe that it is imperative that your Community Manager regularly attends Board and Community meetings. The specific number of meetings provided will depend on the service level selected by your Association. Your Community Manager will not only attend each agreed to meeting, but also assist your board with the planning and execution of said meetings.

For Board meetings, your manager will prepare an agenda and meeting packet based on the Board's requested agenda items.

For Annual Meetings and Budget Ratification Meetings your manager will prepare agendas, create and distribute required notices and proxies, guide the Board through the planning and execution of the meeting, and oversee the homeowner check-in process.

Board Member Education

The Kuester team provides semi-annual workshops to our partner Boards that provide valuable information on a variety of key topics. In addition, we also provide private education training sessions that are Board specific upon your request. At the Board's request, we are also able to provide educational training sessions to your homeowners.



COMMUNITY SERVICE PACKAGES

Kuester Management Group has a wide variety of service packages tailored to meet your specific community type.

SELF-MANAGED COMMUNITIES

Communities Managed by Homeowner Volunteers

HOME OWNER ASSOCIATION (HOA) COMMUNITIES

Single Family and Mixed Use Communities

CONDOMINIUM OWNER ASSOCIATION (COA) COMMUNITIES

Condo Communities

TOWNHOME OWNER ASSOCIATION (TOA) COMMUNITIES

Townhome Communities

COMMERCIAL COMMUNITIES

Commercial (non-residential) Property Owners Associations

ACTIVE ADULT COMMUNITIES

Age Restricted Communities

DEVELOPER COMMUNITIES

New Communities Currently in Planning and Development Stages

LARGE SCALE COMMUNITIES

1000+ Home Communities with Dedicated On-Site Staff

HOA COMMUNITIES

Single Family & Mixed Use Communities



At Kuester Management Group we approach every project with our full commitment to service and long term success with our valued partners. We understand that each community has its own unique needs and challenges, but also understand that at the heart of every strong relationship are a few key components: communication, trust and transparency.

Our management style combines top industry professionals and state of the art technology to foster an environment that allows our team to preserve and protect your community while providing an enhanced quality of life for your owners.

- **Are your homeowners frustrated with response times and professional etiquette provided by your current service provider?**
- **Is your Board left completing too much of the heavy lifting?**
- **Do you have delinquency issues affecting your association's financial stability?**
- **Are your vendors unreliable, inconsistent or difficult to manage?**
- **Do you lack trust in the professional and financial guidance provided by your current service provider?**

From accounting and information technology to landscaping and building maintenance, we have a deep, proven knowledge base from which to provide unparalleled HOA management services.

Key Services Provided

- Professional Board Guidance by a Certified Community Manager
- Accrual Based Financial Management
- 24/7 Homeowner Service
- Best in Class Client Experience
- Proactive Property Preservation
- Consistent & Fair Covenant Enforcement
- Secure Association Web Portal
- Association Meeting Planning & Execution
- Board Education

