



Status Terms & Definitions

Action Required on Your Behalf:

Start Reserve Study: We have a current contract on file, but the reserve study cannot be started until we receive your confirmation. On this date, we will email you to see if you're ready to begin the process. If you're ready, please [contact us](#) with your approval to move forward, and we will assign an analyst to the project. If you're not ready, we will follow up at a later date.

Return Proposal: We have sent you a proposal for this property, but we have not received a signed proposal. If you would like to move forward with our services, [please email us a copy of the signed proposal](#). (We cannot begin your reserve study until written approval has been received)

Complete Questionnaire: Either you have not finished the questionnaire, or we are missing the financial documents needed to produce the preliminary draft. Please complete your questionnaire or [contact us](#) if you have any questions.

Review Report and Submit Budget: Please review the preliminary draft and send your revisions or approved budget to the analyst. Your analyst cannot finalize the report or forward the Disclosure Statement until the budget info has been sent. If you have already supplied these, please [contact us](#).

NO Action Required on Your Behalf:

Request Proposal: If you would like a proposal for this property, please [contact us](#), and we will send you a proposal.

Proposal Rejected: A proposal was already sent to you. Either we received a rejection notification from you, or we marked it as rejected for not receiving a response within the Fiscal Year End.

Proposal N/A: We asked if you would like a proposal, but you declined.

Report in Progress: We have received your completed questionnaire and financial documents. Your analyst is reviewing the information and will email the preliminary draft when it is complete.

Reserve Study Completed: Your analyst has completed and emailed the finalized study. If you have not received this final study, please [contact us](#).