



CARDINAL MANAGEMENT GROUP, INC

The Winning Team - Managing to make a difference.



4670 Cardinal Way, Suite 302  
Naples, Florida 34112



T: 239-774-0723  
F: 239-775-0723



cmgflorida.com

Congratulations on the purchase of your new home!

We would like to take this opportunity to welcome you to your new community!

Your Association was established to maintain the beauty, harmony, and integrity of the community, and serves other maintenance and administrative functions as well. Cardinal Management Group, Inc. has been retained by the Association to provide full-service community management in the form of overseeing daily maintenance and providing complete accounting and administrative services. We are very pleased to be the managing agent for you community and look forward to assisting you in any way we can.

We invite you to utilize our web portal to view and update your homeowner information as soon as possible. Please visit our website at [www.cmgflorida.com](http://www.cmgflorida.com) and click on the "Owner Login" button at the top of the page to register. Once registered, please confirm or update all of your contact information including phone numbers, mailing addresses, email addresses, and contact preferences. If you are a seasonal resident, please keep our office informed of your seasonal moves by updating your mailing address on the portal so you do not miss any important communications. If you have any questions or issues logging in, please contact us.

Once you have created your online portal account, please click on "Documents & FAQ's" category link and then the "Information" subcategory for more information regarding your community.

You will receive an assessment statement prior to each due date with the mailing address to send your payments if you choose to mail your payments. Your association offers a free direct debit service for the payment of your assessments. If you would like to enroll in this service, an authorization form is enclosed for you to take advantage of this method of payment. You may also pay online through the owner portal. Please note, additional third-party processing fees will apply for online payments.

If you have any questions regarding your assessment payments, please contact our Accounts Receivable Department at (239) 774-0723 ext. 207, or via email at [receivables@cmgflorida.com](mailto:receivables@cmgflorida.com).

In addition to managing your community, Cardinal Management Group offers Home Monitoring and Maintenance services directly to owners to assist with issues that are not the responsibility of the association. Please take a moment to read the enclosed brochure and contact one of our knowledgeable Home Services representatives at (239) 774-0723 ext. 206 for more information.

If you have any questions, you may reach us at (239) 774-0723. Should an emergency situation ever arise, please note that our phone lines are answered 24 hours a day.

Sincerely,

Cardinal Management Group, Inc.





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### AGREEMENT FOR PRE-AUTHORIZED PAYMENTS

Community Name: \_\_\_\_\_

I hereby authorize **Cardinal Management Group, INC.**, to initiate debit entries in the amount of my Association assessment from my account indicated below. I also authorize the Financial Institution named below to debit same to such account.

Financial Institution/Branch: \_\_\_\_\_ Routing No: \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ Account No. \_\_\_\_\_

This authority is to remain in full force and effect until the Community and the Financial Institution have received written notification from me of its termination in such time and manner as to afford the Community and the Financial Institution a reasonable opportunity to act upon the request. I further understand that payments will be deducted from my account between the first and tenth of each month in which the assessment is due, and should my payment be returned for any reason, I understand that I can be terminated from the program and I will be charged a \$75.00 administrative fee.

**A VOIDED CHECK MUST BE ATTACHED.**

Name(s) \_\_\_\_\_ Home Phone \_\_\_\_\_

Property Address \_\_\_\_\_ Work/Other Phone \_\_\_\_\_

Mailing Address (if different) \_\_\_\_\_  
(Street Address) (City) (ST) (Zip)

Date \_\_\_\_\_ Signed \_\_\_\_\_

**IMPORTANT NOTE: Please continue to make your payments until you receive written notification of the effective date of the first automatic debit.**

Scan or take a picture with your cell phone and return enrollment form to [receivables@cmgflorida.com](mailto:receivables@cmgflorida.com)

or

**Mail the completed form to:**  
Cardinal Management Group, INC  
Attn: Accounts Receivables  
4670 Cardinal Way, Suite 302  
Naples, FL 34112





Congratulations on your recent purchase!

We would like to take this opportunity to tell you about the benefits of utilizing Cardinal Management Group's home monitoring program. Our **Home Watch Services** can provide you with peace of mind in knowing that your home is being looked after by dedicated, uniformed, fully trained, licensed, bonded, and insured staff. We are a full-service organization offering a wide variety of quality services to our clients.

Why would you need home watch services? If you have been a Florida resident for any length of time, you already know about the unique challenges we face as homeowners. If you are a new owner, you will soon become aware of the issues that arise in our tropical climate. These conditions include daily summer thunderstorms resulting in frequent power-outages, hot and humid conditions which cause extensive damage if air conditioning equipment fails, tropical storms, hurricanes, and pest infestations. Our goal is to alleviate present or future hazards that may arise which affect your valuable home.

Some of the issues we have discovered while performing home-checks for our clients are:

- Malfunctioning or improperly set air-conditioner and/or humidistat, resulting in moldy conditions
- Malfunctioning refrigerators resulting in spoiled food
- Roof or air conditioning leaks
- Doors or windows left unlocked
- Smoke detectors with dead batteries
- Broken pipes or blocked drain lines
- Ghost or "sugar" ant infestations

We can also customize your program with other services. Below are our most popular "Additional Services:"

- Hurricane shutter installation and removal
- Cleaning services
- Interior/Exterior handyman maintenance services
- Vehicle monitoring
- Contractor/vendor access
- Exterior power washing

In addition, we can also arrange for the following:

- Grocery Shopping
- Plant Watering
- Package acceptance and delivery
- Soliciting proposals for construction/maintenance projects, as well as overseeing those projects
- Full concierge service – You can have it all with just one call!

We have enclosed some additional information, along with a service agreement, for your review. Please contact us with any questions you may have, or to discuss your needs and custom design a personal program of home services to ensure the integrity of your investment. Remember, we are always at your service.

Thank you for choosing Cardinal Management Group of Florida, Inc.

**Email: [clientservices@cmgflorida.com](mailto:clientservices@cmgflorida.com) or call (239) 774-0723, extension 205**



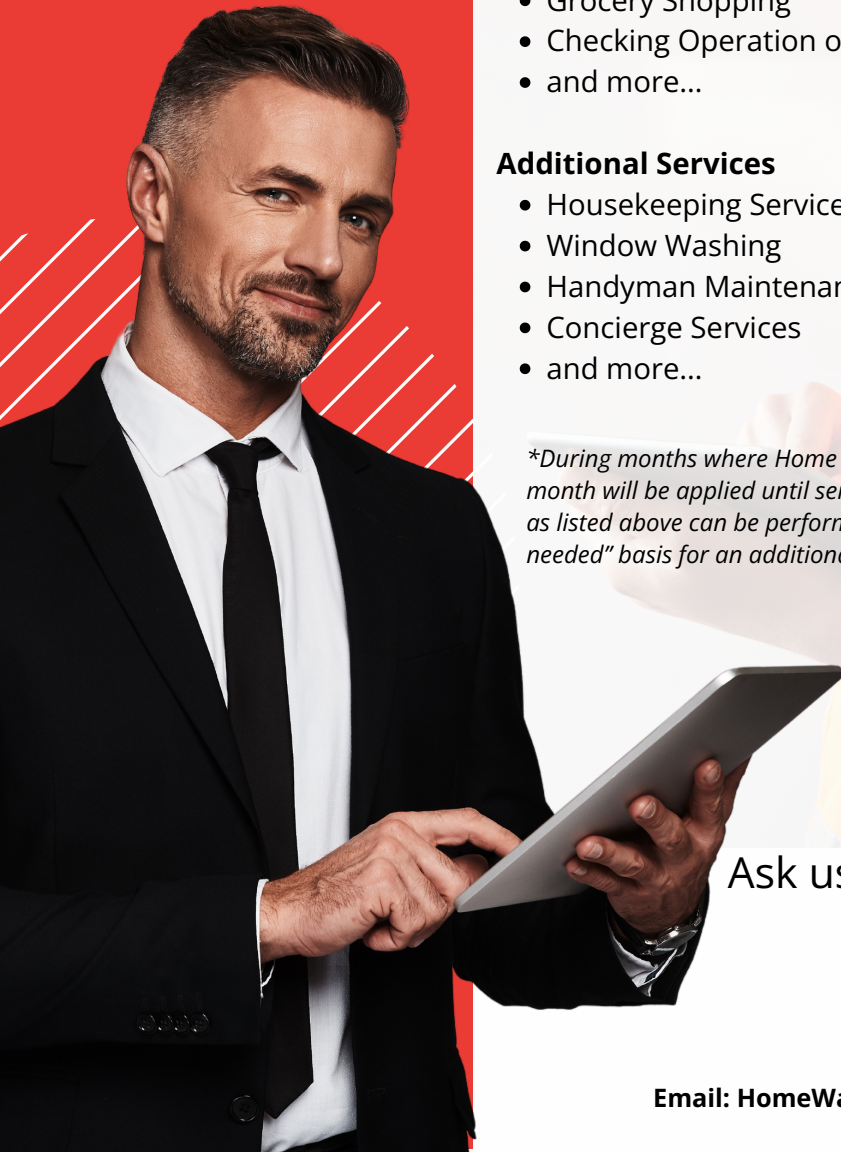
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# Home Watch Services & Pricing

## Prevention Services

- Perform twice-monthly inspection
- Perform weekly inspection

## Multi-Unit Dwelling\*

\$70/mth  
\$110/mth

## Single Family Home\*

\$85/mth  
\$140/mth

## V.I.P. Services

- Checking Operation of Elevator - *Included*
- Secondary Alarm Company Contact - *Included*
- Garbage Curbside Service (Out/In) - *Extra Fee*
- Driving Vehicle - *Extra Fee*
- *and more...*

## Arrival/Departure Services

- Home Opening or Closing
- Placing Lanai Furniture In/Out
- Grocery Shopping
- Checking Operation of Cable & Phone Services
- *and more...*

## Additional Services

- Housekeeping Services
- Window Washing
- Handyman Maintenance Services
- Concierge Services
- *and more...*

*\*During months where Home Watch services is suspended, an administrative charge of \$30 per month will be applied until service is reactivated. V.I.P., Arrival/Departure, and Additional services as listed above can be performed as part of your Home Watch Services package or on an "as needed" basis for an additional fee.*



Ask us today what else we can do for you...  
so you don't have to!

**EMAIL**

Email: HomeWatch@cmgflorida.com or call (239) 774-0723, extension 205



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# Handy-Man Maintenance Services

- > Doorbell Replacement
- > Door Lock Repair/Rekeying/Changing
- > Mailbox/Lock Repair/Replacement/Installation
- > Garage Door Remote Access Pad Installation
- > Smoke Detector Installation/Battery Replacement
- > Ceiling Fan Installation
- > Chandelier or Lighting Installation
- > Ceiling Light Bulb Replacement
- > Thermostat/Battery Installation/Replacement
- > A/C Filter Changes
- > Garbage Disposal, Water Faucet, Toilet Repair/Installation
- > Hanging Mirrors, Pictures, Curtains, Shelving, Towel Racks/Bars, etc.
- > Audio/Video Equipment Installation (TV, wall mounts, speakers, etc.)
- > Screen Repairs and Replacement
- > Drywall Repair
- > Minor Carpentry
- > Minor Interior and Exterior Painting
- > Repair of Woodpecker Holes
- > Pressure Washing of Lanais, Entryways, Walkways, Pool Decks, Driveways, etc.
- > Weed Control in Driveways, Lanais and Pool Decks
- > Furniture Assembly/Moving Furniture/Furniture Removal

***Take advantage of our trained and dedicated  
Maintenance team  
by letting them provide these services for you!***



Ask us today what else we can do for you...  
so you don't have to!

**EMAIL**

[maintenane@cmgflorida.com](mailto:maintenane@cmgflorida.com)



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# Cleaning Services



## Light Cleaning (generally 3-4 hours total)

- Entry Way: Clean door and frame
- Bedrooms: Feather dust open surfaces
- Lanai: Clean floor and rails
- Bathrooms: Sanitize and clean open surfaces
- Vacuum rugs and carpet areas
- Wipe down showers
- Sweep and mop floors
- Clean mirrors in bathrooms
- Clean kitchen countertops
- Clean sinks in kitchen and bathrooms

## Basic Cleaning (generally 4-6 hours total)

- All items included in Light Cleaning
- Sweep and mop floors
- Complete shower detail
- Clean mirrors in bedrooms
- Bedrooms: make beds (if necessary)
- Living rooms: Clean all accessible furniture
- Dust all ceiling fans
- Clean large appliances (outside)
- Clean window sills, top/bottom (as accessible)
- Dining room: Clean accessible furniture
- Clean all accessible baseboards
- Laundry Room: Clean washer, dryer, and sinks

## Professional Cleaning (generally 7+ hours total)

- All items included in Light & Basic Cleaning
- Clean wall ornaments and fixtures
- Clean all cabinets inside and/or out
- Wipe all blinds (as accessible)
- Garage: Sweep and mop floor
- Clean trash bins

*Cleanings are billed per hour (per person). You may customize a cleaning to suit your needs. In addition to a general cleaning of your home, we also offer lanai cleaning, laundry services, window washing, and car cleaning. If you don't see what you need on this sheet, please contact our offices to find out whether we can provide the service you desire. If we can't, we can refer you to a licensed professional instead.*



Ask us today what else we can do for you...  
so you don't have to!

**EMAIL**

[clientservices@cmgflorida.com](mailto:clientservices@cmgflorida.com)



# Home Watch Service Agreement

Client Name: \_\_\_\_\_

Mailing/Billing Address: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Service Address: \_\_\_\_\_

\_\_\_\_\_

Single Family

\_\_\_\_\_

Multi-Unit

Requested Start Date: \_\_\_\_\_

Requested frequency of visits: \_\_\_\_\_

Garage Code: \_\_\_\_\_

Alarm Code: \_\_\_\_\_

Home Phone #: \_\_\_\_\_

Work Phone #: \_\_\_\_\_

Cell Phone #: \_\_\_\_\_

Alternate Phone #: \_\_\_\_\_

Email Address: \_\_\_\_\_

Alternate E-Mail: \_\_\_\_\_

Credit Card Number used for charges: \_\_\_\_\_

Type (Visa/MC/AmEx): \_\_\_\_\_ Expiration Date: \_\_\_\_\_ PIN code: \_\_\_\_\_

Billing Address (if different than above): \_\_\_\_\_

\_\_\_\_\_ Or \_\_\_\_\_

Bank Account Information: Name of Bank: \_\_\_\_\_

Routing Number: \_\_\_\_\_ Account Number: \_\_\_\_\_

The undersigned Client hereby agrees to the provision of, and payment for, the Services described in accordance with the attached Terms and Conditions.

Client Signature \_\_\_\_\_ Date \_\_\_\_\_

Email: HomeWatch@cmgflorida.com or call (239) 774-0723, extension 205

OFFICE USE ONLY

Date: \_\_\_\_\_ Accepted By: \_\_\_\_\_  
Cardinal Management Group, Inc. ("Contractor")

Confirmed Start Date: \_\_\_\_\_ Monthly Home Monitoring Charge: \$ \_\_\_\_\_

Confirmed Frequency of Visits: \_\_\_\_\_

# TERMS & CONDITIONS

## I. CONTRACTOR QUALIFICATIONS

A. The Contractor hereby affirms that it is in the business of providing home monitoring services. The Contractor further affirms that it has the necessary licenses, certifications, equipment, staff and resources to perform such services and will do so in a professional and efficient manner.

B. The Contractor hereby affirms that it carries property damage insurance in the aggregate amount of not less than \$2,000,000 for each occurrence and public liability in the amount of \$2,000,000 for each person/occurrence. The Contractor shall, at its cost and expense, maintain the insurance herein described during the entire term of this Agreement. A certificate evidencing this insurance coverage shall be delivered, upon request, by the Contractor to the Client. The Contractor shall promptly notify the Client in the event of any occurrence of accident or damage harming life, limb or property caused by its actions or the actions of others that may come to its attention in the performance of the contract. Monitoring services are in the nature of intermittent observations on-site by Contractor's staff and are not performed by technicians or tradesmen, who are available only through independent vendors to diagnose and to perform repairs upon Client's request.

## II. CONTRACTOR RESPONSIBILITIES

A. Labor and Material. Contractor agrees to furnish all labor, machinery, equipment, etc., which are necessary to perform the Home Monitoring Services. All supplies shall be commercially available and customary for household purposes. All personnel shall be properly trained and licensed (if required).

B. Services. The services required are set forth in *Exhibit A* to this Agreement. Additional services will be performed as agreed from time to time.

## III. CHARGES AND PAYMENTS

In return for the services by the Contractor in accordance with this Agreement, the Client agrees to pay the Contractor as set forth below:

For home monitoring services, Contractor shall charge, in advance, the credit card provided by the Client, or electronically deduct from the bank account provided by the Client, the full monthly amount listed for each month service is provided (including partial-month service), \$30 per month administrative fee when services are placed on hold, plus any additional services which the Client has requested. In any month in which a home check is scheduled and the home watch representative visits the home but is prevented from performing the check due to owners or guests in residence will still be charged for service as if the check was completed.

The Client will be charged for additional services upon completion of agreed upon services. The total cost of such services will vary depending upon the services requested, and will be agreed to, in writing, prior to the commencement of work. Payment is due and payable upon completion. In the event that payment cannot be obtained in full, Contractor will charge a late payment charge of \$10.00 or 15% of the total amount, whichever is greater, plus interest on the accrued balance of 1.5% per month (or portion thereof). Any account that becomes delinquent twice in a calendar year will require pre-payment of services before a request for service will be processed. In the event that pre-payment is not received, Contractor has the right to refuse service until such payment is received. No additional work in excess of that which is expressly authorized herein will be undertaken by the Contractor unless express consent (facsimile and electronic mail are acceptable) is obtained from the Client by the Contractor.

## IV. DURATION OF AGREEMENT

Either party may terminate this Agreement without cause and without penalty upon thirty (30) days advance written notice by US Mail. All notices will be considered valid when deposited via first class mail, postage pre-paid. Termination shall be effective at the end of a monthly period. However, the termination of home monitoring services cannot be reactivated, if so desired, for a period of one year from the date of termination.

## V. ADDITIONAL SERVICES

Should the Client decide to utilize additional services outside of the Home Monitoring Service, in return for the satisfactory delivery of services by the Contractor in accordance with this Agreement, the Client agrees to pay the Contractor the current hourly rate per hour (one hour minimum, plus materials with acquisition markup) (exceptions are noted below).

- A. Flat Rates. The following services are billed at a flat fee:
- a. Shutter Installation
  - b. Shutter Removal
  - c. Mailbox Lock Replacement
- B. Cleaning Services. Cost based on service level requested

## VI. OTHER RESPONSIBILITIES

Client is responsible for accessibility and condition of the home and property. Client acknowledges that services hereunder are performed when Client is not residing at the service address. Client will indemnify Contractor (and its employees, officers, directors, agents, successors and permitted assigns) and hold Contractor harmless from any liability, loss, claim, cause of action, proceeding, cost or expense for property loss or damage, including reasonable attorneys' fees and expenses (collectively, "Losses") which shall result from performance of this Agreement, other than for the grossly negligent actions of its employees. Contractor's liability hereunder shall in no event exceed the amount paid by Client for the preceding twelve months. This provision shall survive termination or expiration of this Agreement.

## VII. FORCE MAJEURE

Contractor shall not be liable for any delay or failure in performance due to events beyond its reasonable control including Acts of God, earthquakes, hurricanes, wars, acts of terrorism or fires. In such an event, Contractor's obligations and rights shall be extended for the time period equal to the period of excusable delay.

## VIII. ENTIRE AGREEMENT

The parties agree that this Agreement is the entire agreement between the parties, and that any changes to the provisions of the Agreement must be made in writing.

## IX. GOVERNING LAW

The laws of the State of Florida shall govern the interpretation of, and all matters relating to, this Agreement. The Parties agree that any dispute hereunder which is not resolved by their mutual agreement, shall be decided by a Florida court of competent jurisdiction, sitting without a jury.

**Cardinal Management Group, Inc.  
Home Watch Service Agreement Exhibit A**

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- Perform regular site visits
- Secure all windows and doors with available hardware
- Check drains on air conditioning units
- Run all faucets for at least 20 seconds
- Flush and observe operation of all commodes
- Check on all appliances and water heater
- Open cabinet and closet doors
- Check on humidifier and air conditioner
  
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**PREFERRED VENDOR CONTACT INFORMATION**

**Air Conditioning**

Company: \_\_\_\_\_

Contact: \_\_\_\_\_

**Landscaping/Irrigation**

Company: \_\_\_\_\_

Contact: \_\_\_\_\_

**Pool Service**

Company: \_\_\_\_\_

Contact: \_\_\_\_\_

**Misc. Vendors**

Company: \_\_\_\_\_

Contact: \_\_\_\_\_

Company: \_\_\_\_\_

Contact: \_\_\_\_\_



# Extra Services Agreement

Resident Name(s) \_\_\_\_\_

Property Address \_\_\_\_\_ Unit # \_\_\_\_\_

Cardinal Management Group, Inc., a Florida corporation, hereinafter sometimes referred to as the Contractor, and \_\_\_\_\_, hereinafter referred to as the Owner, do hereby enter into an Agreement for the following services, according to the following terms, conditions, specifications and purposes:

## I. CONTRACTOR QUALIFICATIONS

A. The Contractor hereby affirms that it is in the business of providing services for residential properties. The Contractor further affirms that it has the necessary equipment, staff and resources to perform such services and will do so in a professional and efficient manner.

B. The Contractor hereby affirms that it carries property damage insurance in the aggregate amount of not less than \$300,000 for each occurrence and public liability in the amount of \$50,000 for each person/occurrence. The Contractor shall, at his cost and expense, maintain the insurance herein described. A certificate evidencing this insurance coverage shall be delivered, upon request, by the Contractor to the Owner. The Contractor hereby further covenants that all employees and sub-contractors shall be properly insured pursuant to the terms of this Agreement. The Contractor shall promptly notify the Owner in the event of any occurrence of accident harming life, limb or property caused by its actions.

## II. CONTRACTOR RESPONSIBILITIES

A. Labor and Material. Contractor agrees to furnish all labor, machinery, equipment, etc., which are necessary to perform the contracted services, the costs of which shall be included in the final invoice to the customer. All materials shall be of such types and quality as to do the job without damage to any and all property of the Owner, both real and personal. All personnel shall be properly trained, licensed (if necessary), and conduct work in a professional manner.

B. Services. The services offered are set forth in *Exhibit A* to this Agreement, which is not intended to be an all-exclusive list. Such services are to be performed in a good and workmanlike manner.

## III. CHARGES AND PAYMENTS

In return for the satisfactory delivery of services by the Contractor in accordance with this Agreement, or any future verbal or written requests for services, the Owner agrees to pay the Contractor the current hourly rate per hour (one hour minimum, plus materials with acquisition markup) (exceptions are noted below).

**Page 2**  
**Cardinal Management Group, Inc.**  
**Extra Services Agreement**

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A. Flat Rates. The following services are billed at a flat fee:

- a. Shutter Installation
- b. Shutter Removal
- c. Mailbox Lock Replacement

B. Cleaning Services. The Owner agrees to pay the Contractor the current hourly rate per hour.

Contractor shall collect the total amount due upon completion if Owner is present. Otherwise, Owner shall provide a credit card which Contractor shall charge and then electronically send the invoice and receipt. The total cost of such services will vary depending upon the services requested, and will be agreed to, in writing, prior to the commencement of work. Amounts owed are due and payable upon the completion of the work requested. In the event that payment is not received in full on the day of service, Contractor will charge a late payment charge of \$10.00 or 15% of the invoiced amount, whichever is greater, plus interest on the accrued balance of 1.5% per month (or portion thereof). Any account that becomes delinquent twice in a calendar year will require pre-payment of services before a request for service will be processed. In the event that pre-payment is not received, Contractor has the right to refuse service until such payment is received. No additional work in excess of that which is expressly authorized herein will be undertaken by the Contractor unless express consent (facsimile and electronic mail are acceptable) is obtained from the Owner by the Contractor.

**IV. HOLD HARMLESS**

Owner will indemnify Contractor (and its employees, officers, directors, agents, successors and permitted assigns) and hold Contractor harmless from any liability, loss, claim, cause of action, proceeding, cost or expense for property loss or damage, including reasonable attorneys' fees and expenses (collectively, "Losses") which shall result from performance of this Agreement other than for negligent conduct of its employees, agents or servants.

**V. ACCESS REQUIREMENTS**

Owner shall be required to provide Contractor with a means of accessing the residential property for the purposes of performing the agreed upon work. For an additional charge, Contractor can produce a duplicate of a key Owner provided to the association, if applicable.

**V. ENTIRE AGREEMENT**

The parties agree that this Agreement is the entire agreement between the parties, and that any changes or addendums to the provisions of the Agreement must be made in writing.

**VI. GOVERNING LAW**

The laws of the State of Florida shall govern the interpretation and all matters relating to this Agreement.

**Page 3**  
**Cardinal Management Group, Inc.**  
**Extra Services Agreement**

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IN WITNESS WHEREOF, on this \_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_, the Owner has caused this Agreement to be signed on its behalf and Cardinal Management Group, Inc., has caused this Agreement to be signed on its behalf by an authorized officer of Contractor, pursuant to due and proper authority duly heretofore had.

Date: \_\_\_\_\_ By: \_\_\_\_\_  
Owner (sign above)

Print Name: \_\_\_\_\_

Mailing/Billing Address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Service Address: \_\_\_\_\_  
\_\_\_\_\_

Garage Remote Code: \_\_\_\_\_ Alarm Code: \_\_\_\_\_

Home Phone #: \_\_\_\_\_ Work Phone #: \_\_\_\_\_  
Cell Phone #: \_\_\_\_\_ Alternate Phone #: \_\_\_\_\_  
Email Address: \_\_\_\_\_ Alternate E-Mail: \_\_\_\_\_

Credit Card Number used for Billing: \_\_\_\_\_ Type (Visa/MC/AmEx): \_\_\_\_\_  
Expiration Date: \_\_\_\_\_  
Three-digit code on the back of the card: \_\_\_\_\_  
Billing Address (if different than above): \_\_\_\_\_

Email: HomeWatch@cmgflorida.com or call (239) 774-0723, extension 205

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**OFFICE USE ONLY**

Date: \_\_\_\_\_ By: \_\_\_\_\_  
Cardinal Management Group Representative (sign above)

