GHERTNER & COMPANY
SINCE 1968

SUMMER 2026

GHERTNER NEWS

A QUARTERLY PUBLICATION FOR GHERTNER & COMPANY HOMEOWNERS

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Homeowners Guide to Association Finances

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FINANCIAL PLANNING AND BUDGETING WITH GHERTNER & COMPANY

Budget season catches some boards off guard every year. It doesn't have to. At Ghertner & Company, we believe associations that thrive handle it early and treat the budget like a living document over an annual chore.
Need help this budget season? Here are some tips from our financial experts!

Start Before You Think You Need To
Begin budget planning at least 120 days before your fiscal year ends. That window gives the board time to pull financial data, gather vendor quotes, review reserve fund projections, and still have room to adjust before the final vote.

Pull your prior-year actuals and compare them to your budget. Review where you came in over and where you left money on the table each year.

Build the Right Team
Your board treasurer shouldn't be doing this alone. Consider forming a small budget committee of:

- The treasurer
- One or two financially literate residents
- Ghertner's experienced financial team.

Don't Underestimate What Things Cost
Underestimating expenses is the most common budgeting mistake boards make. Operational and maintenance costs are subject to various market pressures and the aging of community assets. Build in a realistic buffer, not wishful numbers.

Revenue projections deserve the same discipline. Base collection estimates on actual historical rates, not what you hope homeowners will pay. A small contingency line in the budget is better than a surprise special assessment later.

Reserve Funding Is Not Optional
The reserve fund covers future repairs and capital replacements for roads, roofs, amenities, and common area infrastructure. Boards that underfund reserves tend to face two bad options later: deferred maintenance or emergency special assessments. Neither one is good for property values or resident trust.

Critical Timeline at a Glance

- 120 days out: Pull financial data, review reserve study, identify priority projects
- 60 days out: Draft budget, get vendor quotes, committee review
- 30 days out: Present draft to the full board, open for homeowner input.
- Final: Board vote, distribute to homeowners, file as required by governing documents.

A well-built budget is one of the clearest signs of a healthy, well-run association. It sets expectations, builds trust, and keeps the community on stable financial ground year after year. Need help with your budgeting? Remember, your management team at Ghertner & Company is always on your side.

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Ghertner & Company Advances HOA Budget Planning with Vantaca Technology

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INVESTING IN EXCELLENCE

FOR PROPERTY MANAGERS WITH GHERTNER & COMPANY

Effective community management begins with high-caliber professionals. Property managers are tasked with advising boards, overseeing community assets, and addressing resident needs, a scope of responsibility that requires significant, long-term expertise rather than just good intentions. At Ghertner & Company, we view professional development as a fundamental aspect of our operations, not merely a routine requirement.

A Foundation of Continuous Learning
The community association industry is dynamic, constantly evolving due to shifts in legislation, financial standards, and management technology. Our managers must remain proficient across all these areas.

New managers undergo comprehensive onboarding focusing on operational procedures, including our company standards and client expectations. Our training helps them learn to balance the technical and interpersonal aspects of management, as both are equally vital.

Professional Certifications That Mean Something
We support our managers in pursuing credentials through the Community Associations Institute (CAI). CAI programs cover governance, financial management, legal compliance, and leadership at a level of depth that day-to-day experience alone doesn't provide.

When a board works with a Ghertner manager, they're working with someone who has invested in their professional knowledge. That investment shows up in the quality of advice and the confidence with which our managers handle complex situations.

Training That Keeps Going
Onboarding is the starting point, not the finish line. Our managers participate in ongoing training throughout the year on topics that directly affect the communities they serve.

Our training rotation includes:

- Board governance
- Budget development
- Contract administration
- Risk management
- Legislative updates
- Conflict resolution
- Technology

Beyond formal sessions, our managers benefit from working alongside experienced colleagues and senior leaders. Real-world situations are some of the best teachers. We build a culture where that kind of knowledge sharing happens naturally, not just in scheduled meetings.

Ghertner's Educational Efforts Bring HOA Results
All of this training has a purpose: better outcomes for the communities we serve. Well-prepared managers advise boards more effectively, manage financial resources with more discipline, communicate more clearly with residents, and handle problems before they escalate.

Ghertner & Company has been committed to this standard for more than 50 years. That commitment doesn't waver. As the demands on community associations grow, we keep investing in the people who help those communities thrive.



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Summer HOA Maintenance Checklist

PREPARING YOUR COMMUNITY FOR SUMMER MAINTENANCE

HOA maintenance is essential for protecting property values, enhancing curb appeal, and preventing costly repairs. We help boards get ahead of seasonal maintenance needs with proactive planning and routine inspections. Here's a quick summer maintenance checklist to help identify areas that may need attention throughout your community:

- Schedule roof and gutter inspections. Clearing debris and addressing minor damage before rain arrive prevents much larger water intrusion problems down the road.
- Protect common area irrigation systems. A burst line in a shared green space or near a building foundation is an expensive and avoidable repair.
- Audit exterior lighting across parking lots, walkways, and common areas. Residents need well-lit paths and parking areas.
- Walk all sidewalks, steps, and paved common areas and document cracks or uneven surfaces.
- Service HVAC systems in clubhouses, fitness centers, and any other common buildings before heating season.
- Test fire safety equipment in all common buildings, including smoke detectors, extinguishers, and emergency lighting, as part of your seasonal walkthrough.
- Routine inspections on pools, playgrounds, and other recreational areas for safety and wear concerns.
- Inspect signage for visibility, damage, or fading.

Getting your community ready now means fewer surprises and smoother operations all season long. Ghertner & Company helps boards plan and coordinate summer HOA maintenance so nothing slips through the cracks.

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