



Active Adult Communities



Measure the Value of Using a Leader

We provide accounting services to over 1,000 Common Interest Realty Associations (CIRAs), making us the #1 provider of these services in the state, as well as one of the nation's leaders.

Some of our many services include:

- Annual Audits, Reviews & Compilations
- Board/Association Education & Presentations
- Budget Development & Review
- Expert Witness and Testimony
- Preparation of Data for Governmental Agency Submission
- Replacement Funding Strategies
- Tax Research and Advice
- Transition to Unit Owner Control
- Voting Tabulation Services

A New Lifestyle

People are attracted to live in active adult communities for a variety of reasons; whether it's for better access to recreational amenities such as golf, to spend more time with their peers, or eliminate responsibilities like landscaping or snow clearing. And, while it may not be in their immediate plans to do so, many residents of active adult communities and they have more time to become involved in providing input, or taking a leadership role, in the Association's governance by becoming a member of a committee, or even a board member.

People in these leadership roles face a variety of challenges in properly addressing the varied, complex and specialized financial needs of an active adult community. Wilkin & Guttenplan P.C. can help.

Different Responsibilities

Board members of these communities have exchanged one set of responsibilities for another. Our responsibility is to help these Boards and its committees full their fiduciary duty to their community.

Wilkin & Guttenplan, P.C is nationally recognized for its leadership in providing accounting services for Common Interest Realty Associations (CIRAs), and offers specialized expertise to:

- Help boards fully understand the financial and tax impacts of issue such as clubs, trips, facilities, and capital planning to preserve unit values and marketability
- Offer guidance to assist Boards in making the financial decisions best suited for their Association's specif situation

The Right "Address" For Financial Guidance

Being an industry leader means we "have seen it all" and are prepared to offer expert advice and consultation to communities on a wide range of issues. We offer our clients the expert guidance they need to make appropriate financial decisions, including:

- Ensuring the stability of maintenance assessments
- Properly structuring clubs and recreational facilities to prevent adverse tax impacts
- Providing insights to balance the desires of "snowbirds" with sound fiscal policy and services addressing the needs of year-round residents