

3.31.23, 8 am – 10 am, 3020 Rosemead
Transition Meeting with Yves Prechac
Participants: Damian, Kathy, Dana and Yves

Notes:

Reviewed Yves monthly activities and interactions with Cavanaugh. Discussed interactions with others such as homeowners that are delinquent. Reviewed file structure outlined on Yves' transition doc. Determined that his Outlook folders will not be transferred. All manual files will be left with Dana by April 30, other electronic files will be provided once we give him an external drive on which to copy them. We will try to get to Google drive by using a designated browser to review what is there.

Action Items:

- Dana to update process sheet to reflect activities and provide copies to all board members and Kathy
- Yves to send Kathy, Damian and Dana username and password for Google drive, Dana and Kathy to review files for relevance and determine if there is anything we really need
- Yves to provide all other hard copy files and electronic files by 4-30
- Dana to provide Yves with external hard drive (USB) of 1 gig or greater so he can transfer by 4-30
- Bank statements and copies of manual checks to filed by Dana and kept with association files, Damian to try and get electronic copies of statements sent to him by Teri Booth
- Yves to send Estoppel form
- Ken to remove Yves from bank account and add Damian
- Dana to send 2023 budget to Cavanaugh