

Reserve Specialist[®] Redesignation Form

Fill in this application with Adobe Acrobat Reader or print clearly in ink. To work in Reader: save the file on your computer's desktop, complete the form, and save again using your last name in the filename (e.g., RS_Jones.pdf) before printing. Label the required attachment (reserve study clients, as outlined on page 2) clearly and attach to this application.

Submit completed form to the CAI headquarters office, 6402 Arlington Blvd., Suite 500, Falls Church, VA 22042, e-mail to caieducation@caionline.org or fax to (703) 970-9558. Form is due by the August deadline indicated on your redesignation notice. No fee is required with this form, as fee is billed separately. For further information please contact (888) 224-4321.

I. Designee Information

▼ CAI MEMBER NUMBER <input type="text"/>	▼ RS NUMBER <input type="text"/>	
▼ FIRST NAME AND MIDDLE INITIAL <input type="text"/>		
▼ LAST NAME AND SUFFIX <input type="text"/>		
▼ HOME ADDRESS <input type="text"/>		
▼ CITY <input type="text"/>	▼ STATE <input type="text"/>	▼ ZIP <input type="text"/>
▼ FIRM/ASSOCIATION <input type="text"/>		
▼ BUSINESS ADDRESS <input type="text"/>		
▼ CITY <input type="text"/>	▼ STATE <input type="text"/>	▼ ZIP <input type="text"/>
▼ PREFERRED E-MAIL ADDRESS <input type="text"/>		
▼ HOME PHONE <input type="text"/>	▼ MOBILE PHONE <input type="text"/>	
▼ BUSINESS PHONE <input type="text"/>		

Please initial the following questions as they relate to the past three years.

▼ INITIAL

_____ I have continued to prepare or be in responsible charge for the preparations of at least 20 Reserve Studies over the past three calendar years, with at least one per year. All studies meet the minimum report requirements and disclosures as outlined in the **RS Designation National Reserve Study Standards** document.

_____ I have attached a list containing the following information for at least 15 recent Reserve Study clients:

- Community association name
- Location (city and state)
- Date prepared
- Reserve study level of service

Please answer the following questions.

Have you ever been involved in reorganization for the benefit of creditors or in bankruptcy as a debtor? *If yes, attach a detailed explanation.* YES NO

Have you ever been convicted of a felony or misdemeanor, or imprisoned under sentence for any felony or misdemeanor (except traffic violations)? *If yes, attach a detailed explanation.* YES NO

Have you been found liable or had a judgment or consent decree entered against you in civil court related to any business or professional matter or in any other civil case (with the exception of any domestic or family law, e.g., divorce or child custody)? *If yes, attach a detailed explanation and include a copy of the judgment entered against you.* YES NO

Have you ever been convicted of fraud, misrepresentation, misappropriation of funds or property? *If yes, attach a detailed explanation.* YES NO

Do you know of any reason why you would be unable to obtain bonding? *If yes, attach a detailed explanation.* YES NO

Have you ever been subject to disciplinary action by any professional organization? *If yes, attach a detailed explanation.* YES NO

Signature

By signing below, I agree to abide by the CAI Professional Reserve Specialist Code of Ethics and to be subject to disciplinary action as adopted by the Board of Trustees. All of the information provided by me is complete and correct to the best of my knowledge and belief. If I made or at any time make statements with knowledge of its falsity, I understand that it shall be cause for denial or revocation of the designation.

Further, if any circumstance changes my answer to any of the questions above, I will notify CAI Education/ Designations Department by providing a written statement and detailed explanation within 30 days. I will address the statement and detailed explanation to: CAI Designations Department, 6402 Arlington Blvd., Suite 500, Falls Church, VA 22042 or info@caionline.org.

PRINTED NAME

SIGNATURE