



Form: #1004
Updated: August 2008

THE SOURCE FOR PROFESSIONAL
ASSOCIATION MANAGEMENT COMPANIES

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Review Report Form

- Reviewers shall complete and return both pages of this form to the AMC being audited.
- Reviewers shall complete and return ONLY the first page to AMC Institute.

Date _____ Member of AICPA: Yes No Other: _____

Do you routinely conduct Special Agreed Upon Procedure Engagements? Yes No

Company Name _____

Reviewer _____ Address _____

City _____ Province/State _____

Postal Code _____ Country _____

Phone _____ Fax _____

Email _____ Website _____

Name of Association Management Company being audited _____
Contact Person _____ Phone _____

Review Status:

- Conducted an advanced desktop review of all materials submitted. Date: _____
- Conducted an onsite review of the materials & systems. Date: _____
- The AMC passed both the desktop and onsite reviews following the ANSI Standard dated May 2008. Date: _____
- The AMC did not pass the review. Date: _____
- The AMC was reviewed again. Date: _____
- The AMC passed the review. Date: _____
- The AMC did not pass the review. Date: _____
- The AMC failed the review. Date: _____
- The AMC plans to appeal the decision. Date: _____

*We certify that the above mentioned AMC has been reviewed on the dates noted in the date field above.
We certify that the most recent date listed above indicates the results or status of our review.*

Reviewer's Name (Print): _____ Date: _____

Reviewer's Signature: _____

Firm Name: _____

AMC Institute Office Use Only
Date Received: _____
Date Processed: _____

Send this page only to the AMC Institute Office. Send this page and page 2 to the AMC.

Audit Report Form

Indicate your assessment of this firm in each of the key accreditation areas listed in the table below. You may wish to duplicate this table to accommodate more than one review of the AMCs documentation.

<i>Areas</i>	Complete (X)	Incomplete (X)	Comments
Client Contracts: Review Procedures and Requirements			
Servicing the Client & Service Delivery Procedures			
Project (Service) Completion, Reviews, and Post Contractual Procedures			
Financial Management & Internal Controls			
Insurance Coverage			
Employee Recruitment and Selection			
Employee Training and Professional Development Procedures			
Subcontracting and Purchasing Requirements			
Record Keeping Requirements			
Internal External Audit Requirements			

Auditor's Signature: _____ Date: _____