PLATINUM FINANCIAL SERVICES

Why Platinum Financial Services?

An independent HOA management model that separates financial oversight from operations.

Platinum Financial Services provides CPA-led financial accounting, reporting, and advisory services for Homeowner Associations that want transparency, control, and flexibility — without relying on a traditional property management company to manage their money. We help HOA boards separate financial accountability from property management, so your community stays in control of its assets.

THE PROBLEM

Traditional HOA Management Falls Short

Most HOA boards are told they need a full-service property management company to operate effectively. The reality tells a different story.

- Property managers **control the association's bank accounts**
- Financial reports are often **late, unclear, or inaccurate**
- Boards lack **real insight into cash flow and reserves**
- Accounting decisions are made by **non-financial professionals**
- Changing management firms disrupts both **operations and finances**

> Property management companies are good at managing properties.
> **They are not financial experts.**

OUR SOLUTION

Decoupled HOA Financial Management

We separate what should never be combined — financial oversight from property operations.

TRADITIONAL MODEL	PLATINUM FINANCIAL SERVICES MODEL
One company controls operations and finances	**HOA retains full financial control**
Bundled services	**Independent, CPA-led accounting**
Limited transparency	**Clear, board-ready reporting**
Manager-driven decisions	**Board-driven financial strategy**
Difficult transitions	**Financial continuity, regardless of manager**

Your HOA chooses how it is managed. We ensure it is financially sound.

WHO WE SERVE

Built

Communities seeking an independent HOA management model that separates financial oversight from operations.

Our HC

- ✦ HOA-led communities seeking an independent financial oversight model separate from property operations.
- ✦ Medium to large associations with 300+ homes
- ✦ Communities with shared land, amenities, or buildings
- ✦ Boards seeking independence from bundled management models
- ✦ Associations transitioning away from traditional property management firms

HOA ACCOUNTING & FINANCIAL SERVICES

What We Deliver

Accounting & Financial Reporting

- Monthly financial statements (Balance Sheet, Income Statement, Budget vs. Actual)
- General ledger maintenance
- Bank and investment reconciliations
- Assessment tracking and financial reporting

Treasury & Asset Oversight

- Independent oversight of operating and reserve accounts
- Cash flow monitoring and reserve analysis
- Financial controls and segregation of duties
- Board-level financial dashboards

Budgeting, Reserves & Strategic Planning

- Annual budget development and support
- Reserve study coordination
- Long-term capital and assessment planning
- Financial scenario modeling for boards

Board Advisory & Governance Support

- Treasurer and board financial training
- Policy and internal control development
- Transition support from property management firms
- Audit and tax coordination

✔ No conflicts of interest
✔ No bundled incentives
✔ No financial opacity

Your HOA. Your Money. Your Choice.
Unbiased, CPA-level financial support — designed for HOA boards.

1,300+
HOMES SERVED

FEATURED COMMUNITY — STONE MOUNTAIN, GA

We currently serve a large Homeowner Association in Stone Mountain, Georgia consisting of **1,300 homes** and **120 acres of shared land and buildings** — demonstrating our ability to support complex, high-scale communities with independent financial oversight and strategic guidance.

GET STARTED

Schedule a Board-Level Consultation

Whether your HOA operates independently or is considering a transition away from bundled management models, we help boards evaluate financial readiness and long-term sustainability.

REQUEST A FINANCIAL READINESS ASSESSMENT

Schedule a Board Consultation

Whether your HOA operates independently or is considering a transition away from bundled management models, we help boards evaluate financial readiness.