

**Directions to:  
Executive Conference Center  
at The Bayside Expo  
150 Mt. Vernon Street  
Dorchester, MA  
677. 822.7300**

**From the North**

**Take I-93 South:** Take the Exit 15—turn left onto Columbia Road. Bear right around rotary. Take second right off the rotary and then our first immediate sharp right. Proceed straight then turn left at the 1st set of lights onto Mt. Vernon Street. You will see Doubletree Club Hotel on your left. Turn left into parking lot between Bay Side Expo and Doubletree Hotel. Take your first left into the office parking lot and enter building through the front door. Check in at security desk and take elevator to basement level.

**From the South**

**Take I-93 North:** Take Exit 15—At end of ramp take a right. Bear right around rotary. Take second right off the rotary and then your first immediate sharp right. Proceed straight then turn left at the 1st set of lights onto Mt. Vernon Street—Doubletree Club Hotel is on the left. Take your first left into the office parking lot and enter building through front door. Check in at security desk and take elevator to basement level.

Free Parking Available.

For more training information,  
visit our  
website at [www.neahma.org](http://www.neahma.org)  
Phone: 781-380-4344  
Fax: 781-380-4842  
[julie.kelliher@neahma.org](mailto:julie.kelliher@neahma.org)



NEAHMA  
400 Washington Street, Suite 210  
Braintree, MA 02184

**Save the Date!**  
MA Agency Networking Breakfast,  
June 10, 2009—The Tavern at  
Quarry Hills Granite Links Golf Club,  
Quincy, MA

**MA Financial Management/Budget  
Preparation Workshop**

**May 20, 2009**

**Executive Conference Center  
at The Bayside Expo  
150 Mt. Vernon Street  
Dorchester, MA**

**Presenter:**

**Doreen Donovan  
Wendell Yee**

[www.neahma.org](http://www.neahma.org)

## Program Overview

### Financial Management/Budget Preparation

This first half of today's session will provide you with an overview of the tools you need to prepare a zero based budget for an on-gong entity or a property that has reached sustaining occupancy for at least one year. We will discuss the purpose, time-frame and resources available to you in preparing your annual operating budget.

The first half of the session assumes you have access to the tools and resources you need to complete the program, we will focus on how to create or gather the material, if you don't already know how to do so, as well as complete case studies.

**Roles and Responsibilities:** What role you, your staff, corporate, owner have in the budget preparation and review process.

The second half of the day's session will focus on financial management systems, understanding how to read the balance sheet and its importance as it relates to your review of the operating statement of income and expenses. Financial management can be broken down into three areas, the reporting, monitoring and controlling of income and expenses. It is critical as the manager of a property that you understand all three of these aspects and how it relates to the owners goals and objectives.

**Attendees must bring a calculator and a pencil.**

NEAHMA would like to thank Corcoran Jennison Management Companies for hosting this training.

## Agenda

### Registration

**8:30 am - 9:00 am**

(Continental breakfast included)

### Morning Presentation

**9:00 am - 12:00 pm**

### Lunch

(Included)

**12:00 pm –12:30 pm**

### Afternoon Presentation

**1:00 pm - 3:30 pm**

Registration Info or Questions?  
Call NEAHMA 781-380-4344

Participants who attend the full 6 hours of this workshop will earn 6 CEU's.

## REGISTRATION FORM

Fax In Registration (781) 380-4842

Registration Deadline: May 15, 2009

MA Financial Management/Budget Preparation

Wednesday, May 20, 2009

Please complete a separate form for each registrant and fax registration. Mail a hard copy along with your payment to: NEAHMA, 400 Washington Street, Suite 210, Braintree, MA 02184

Online payment option available at [www.neahma.org](http://www.neahma.org)

### Registration Fees:

\_\_\_\_\_ Member \$259 \_\_\_\_\_ Non Member \$329

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Management Co: \_\_\_\_\_

Property Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_

Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

E-mail: \_\_\_\_\_

### Cancellation Policy:

There is a \$50 administrative fee for cancellation 15 working days prior to the course. After this date, fees are *non-refundable*. A substitute may be sent in the place of the registrant. Class space is limited; therefore your registration must be accompanied by full payment in order to confirm your space for this course.

### Outstanding Collection Policy:

Payment for trainings and workshops are payable upon receipt. Registrants with outstanding balances that exceed 90 days will be suspended from attending future trainings and workshops until payment is received in full.

This organization complies with the Title III of the Americas with Disabilities Act (ADA). The site is accessible for individuals with disabilities and if a registrant requires special accommodations please contact the NEAHMA office at least ten days prior to the date of the course.