

Fwd: City National Bank Online Portal Access

----- Forwarded message -----

From: **Rachel Mayer**

Date: Thu, Feb 24, 2022 at 3:31 PM

Subject: RE: City National Bank Online Portal Access

To: Telisha Catchings

Cc: Vince Pino

Timothy Furi

Good Afternoon Telisha,

My apologies for the delay, Monday, Presidents Day was an observed holiday for us.

I have included the Board President, as invoices approved through our Avid platform are currently done by Vince.

We can certainly add you both as approvers in Avid. You would need to add as an agenda item and be added as signors on the Bank accounts, your name(s) will appear on the checks written for the association verses the agent signor for FirstService. This still does not mean you have access to the any online banking information. Associations bank statements are included in the full financials every month, along with reconciliations. Checks or no longer included for fraud prevention.

We have fraud security measures in place for all our associations, broke out into many departments, Treasury is responsible, alerts, EFT's, copies of checks, void checks, etc., Banking opening and closing accounts.

General Ledger accountants produce the financials.

I hope this clarifies for you what you are requesting.

Please let Vince know how the Board would like to proceed.

Thank you,



Rachel Mayer, LCAM

Regional Director

2870 Scherer Drive N. Suite 100

Saint Petersburg, FL 33716

Customer Care 1-866-378-1099

www.fsresidential.com

From: Telisha Catchings

Sent: Monday, February 21, 2022 9:47 AM

To: Rachel Mayer

Subject: Fwd: City National Bank Online Portal Access

Hi Rachel

I am following up with you regarding the correspondence I had with Vince Pino last week. He informed me that you would be in the office today and that you would grant me access to Avid as Treasurer of the HOA board for Copperidge. I need access to Avid in order to properly perform my fiduciary duties as Treasurer.

Thank You

Telisha Catchings

----- Forwarded message -----

From: **Telisha Catchings**

Date: Mon, Feb 21, 2022, 8:14 AM

Subject: Re: City National Bank Online Portal Access

To: Vince Pino

Hi Vince

I'm following up on our email on Friday. You confirmed that Rachel would be in today in order to grant me access as Treasurer of Copperridge to Avid. I'll be available if she needs me to contact her or vice versa.

Thank You

Telisha Catchings

On Fri, Feb 18, 2022, 9:11 AM Vince Pino

wrote:

The Regional managers are the only ones that can have you set up

. I will have Rachel request this for you.

Thank you.

Vince Pino

Licensed Community Association Manager

FirstService Residential

2870 Scherer Drive N., Suite 100 | St. Petersburg, FL 33716

Direct

Email:

Follow us on | [Facebook](#) | [Twitter](#) | [LinkedIn](#) | [YouTube](#)

On Feb 18, 2022, at 9:06 AM, Telisha Catchings

wrote:

Hi Vince

I would like to request access to Avid that Rachel confirmed that I'm allowed to have access to. Please forward the information that I need to gain access to Avid.

Thank You

Telisha Catchings

On Fri, Feb 18, 2022, 8:37 AM Vince Pino

wrote:

Telisha, see below response from our Regional Director Rachel Mayer. If you have any questions, she will be in the office Monday and I can have her contact you directly.

j

Vince,

You can have them approve invoices in Avid, that is the only invoice access they would have. The full financials show all the debits (AP check/ACH's) The bank statements are also in there.

Thank you,

Vince Pino

Licensed Community Association Manager

FirstService Residential

2870 Scherer Drive N., Suite 100 | St. Petersburg, FL 33716

Direct

Email:

Follow us on | [Facebook](#) | [Twitter](#) | [LinkedIn](#) | [YouTube](#)