

## 2026 ASSOCIATION PLANNING CALENDAR

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### January

- ✓ Confirm the association fiscal year start
- ✓ Ensure 2026 condominiums with 25 or more units maintain a required website
- ✓ Adopt the annual budget if it has not already been approved
- ✓ Verify authorized signers and review bank records
- ✓ Review insurance coverage and note renewal dates for the year
- ✓ Confirm financial reporting obligations and CPA engagement
- ✓ Develop a master calendar of association specific critical dates

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### June

- ✓ Conduct a midyear budget review
- ✓ Review and update the reserve study as needed
- ✓ Plan for maintenance projects and capital improvements if applicable

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### September

- ✓ Consider next year's board composition and transition planning
- ✓ Begin recruitment of new board members

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### February

- ✓ Prepare for the upcoming tax filing season
- ✓ Begin preparations for annual financial reporting requirements
- ✓ Review governing documents and enforcement procedures

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### April

- ✓ Review board education and certification requirements
- ✓ Condominium board members must complete an annual legal education course
- ✓ HOA board members must complete four hours of education for communities under 2500 parcels
- ✓ HOA board members must complete eight hours of education for communities over 2500 parcels

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### July

- ✓ Perform a midyear legal compliance review
- ✓ Update rules, policies, or resolutions if necessary

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### October

- ✓ Adopt the association's budget for the next year
- ✓ Review cybersecurity practices and records safeguarding procedures

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### December

- ✓ Adopt the association's budget for the next year
- ✓ Review cybersecurity practices and records safeguarding procedures

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### March

- ✓ Tax filings due including corporate returns or extensions
- ✓ Review legal compliance and address outstanding issues
- ✓ Start planning for the annual meeting and election process
- ✓ Verify active status with the Florida Department of Corporations via [sunbiz.org](http://sunbiz.org)

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### May

- ✓ Annual reports must be filed by May 1
- ✓ Update board rosters and officer appointments in the annual report
- ✓ Review records organization and retention practices

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### August

- ✓ Begin planning the budget for the upcoming year
- ✓ Review vendor contracts and service agreements
- ✓ Evaluate reserve funding levels

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### November

- ✓ Plan the board and committee meeting calendar for the upcoming year
- ✓ Prepare year end records and financial documentation
- ✓ Conduct vendor and professional performance reviews