HOA Dues Increase and Special Assessment Notice Template

A free template from Havn (havnhq.com/templates). Replace every bracketed item, delete what does not apply, and check your state's rules and your governing documents before sending.

Notice of [Assessment Change / Special Assessment]

[Association name]

[Date]

Dear [Owner name],

Regular assessment, effective [date]

At its meeting on [date], the board adopted the [year] budget. Beginning [date], the regular assessment for your home will be $[new amount] per [month / quarter / year], up from $[current amount]. The budget totals $[amount], of which $[amount] goes to reserves.

The change comes from: [insurance premium up $[amount] / landscaping contract renewal / the reserve study's recommended contribution / utility rates]. The full budget is on the owner portal under Documents and is enclosed.

Special assessment

On [date], the [board / members] approved a special assessment of $[total] for [purpose, such as roof replacement on buildings A through D]. Your home's share is $[amount], payable [in one payment by [date] / in [number] installments of $[amount] due on [dates]]. The money is held in its own fund and spent only on this project.

How to pay

Pay by card or bank account on the owner portal at [link], or mail a check to [address]. If you have autopay, it [will update to the new amount on its own / needs to be updated by [date]]. Bank payments carry [no fee / a fee of ...]; card payments carry [fee].

Questions

The board will take questions at its meeting on [date] at [time], [place]. You can also text [number], email [address], or send a request from the portal.

[Name], Treasurer, on behalf of the Board of Directors

Enclosure: [year] budget.

This template is a starting point. Notice periods, fee limits, and voting rules vary by state and by governing documents, so check both, or ask your attorney, before sending. State summaries: havnhq.com/hoa-laws.