

Annual General Meeting Checklist

Last Modified on 18/06/2025 4:19 pm AEST

After the Annual General Meeting, there are certain recommended areas of updates within StrataMax that can be carried out. The StrataMax Training Team have developed this checklist as a guide on what areas can be updated post an Annual General Meeting and to assist in creating consistency with the processes carried out.

Please note that this checklist does cover a generalised process and does not cover every scenario of a general meeting. Therefore it is encouraged that each Strata Manager develop this simple checklist further to suit their own workflows and processes.

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The blue heading of each section in this checklist is a link to the relevant Online Help article to assist with that particular menu in StrataMax.

Building Information	Completed By
Last Annual General Meeting* this will assist when updating 'Appointments' in Office Bearers.	
Next Annual General Meeting (can be reported on a monthly basis).	
Meeting Address.	
Next AGM Time + State.	
Last General Meeting.	
Next General Meeting/ Next Committee Meeting.	
AGM Minutes Sent.	
Financial Year Audit (Required, Name, Done, Date).	
Add any applicable notes regarding last AGM that may be useful for staff to know.	
Office Bearers	Completed By
Date of Resignation: Retire any members no longer forming the Committee with the date of the AGM.	
Appointments: Fill this in if blank.	
Add new Committee Members not already included. Can also be done in the Roll menu in the <i>Owner Tab > Committee Member</i> field.	
Insurance	Completed By

Add any new policy types, ensuring to add details to as many fields as possible.	
Remove any policies that have expired or are no longer covered.	
Add any insurance documents to DocMax and link to the relevant policy in the Insurance menu.	
Set up the premium accounts for the building's main policy.	
Pay the insurance company using the premium account as the expense code.	
<i>Registers</i>	Completed By
Update the Asset Register .	
Update the Common Property Register .	
Update the Contracts Register .	
Update the Inspections Register (Sinking Fund Reports, Lift, Fire Safety, Insurance Valuation, etc.).	
Update the Others Register .	
<i>Budget Update</i>	Completed By
Update the proposed Income and Expenses for the financial year.	
Copy last year budget to current year if there are no changes.	
Produce a Budget Report and check that entries are correct.	
<i>Levy Management</i>	Completed By
Perform a Levy Year End Rollover .	
Strike levies for reporting and certificate purposes.	
Open the Levy Register and check all details are correct.	
<i>Management Fees Setup</i>	Completed By
Update any standard management fees or fixed disbursements to be applied to the building.	
<i>DocMax or Meeting Hub</i>	Completed By
Distribute the meeting minutes by either uploading to the StrataMax Portal via DocMax, or by using the Distribution via Meeting Hub.	