

**REQUEST AND RESPONSE
FOR DOCUMENTS AND INFORMATION
COMMON INTEREST DEVELOPMENT**

THIS FORM FOR USE
IN CALIFORNIA ONLY

Real Estate Forms
Since 1966



Owner of Separate Interest _____ Unit or Lot No. _____
Address _____
To: Homeowners' Association _____

A sale of the above separate interest unit or lot is anticipated. Please furnish the following documents and information in (check one)
 hard copy electronic format as specified in Civil Code § 1368 **within ten days**. If checked , copies of the minutes of the Board for the last 12 months are also requested.

Owner's signature _____ Date _____
Please mail to _____

In response to your request for documents and information concerning the above property, please be advised as follows:

1. GOVERNING DOCUMENTS. The following governing documents are enclosed:

- Articles of Incorporation or Association
- By-Laws
- Declaration (CCRs) with current amendments
- Current Rules and Regulations

2. AGE RESTRICTION STATEMENT IS ENCLOSED. (If not checked, none exists.)

- Age Restriction Statement

3. FINANCIAL STATEMENTS. The following financial documents are enclosed:

- Pro Forma Budget (Including Assessment and Reserve Funding Disclosure Summary required by Civil Code § 1365.2.5)
- Year-end Audit or Review
- Association Collection Policies and Practices
- Insurance Summary

4. STATUS OF ASSESSMENTS.

- (a) Current monthly assessment against the Unit or Lot is \$ _____.
- (b) The Unit or Lot is charged with unpaid assessments of \$ _____.
- (c) The Unit or Lot is charged with unpaid fines or penalties of \$ _____.
- (d) There is , is not a change in the Association's current regular or special assessments which has been approved by the governing body but has not yet become due and payable. If yes, the change is as follows:

5. NOTICE OF UNRESOLVED VIOLATION IS ENCLOSED. (If not checked, none exists.)

- Copy or summary of any notice of an unresolved violation of the governing documents sent to Lot or Unit Owner.

6. LITIGATION.

- (a) There is , is not a preliminary list of claimed defects pursuant to Civil Code §1368(a)(6). If checked yes, a copy of the list is attached.
- (b) There is , is not information of any settlement made regarding the common area as required by Civil Code §1375.1. If checked yes, a copy of the information is attached.
- (c) There is , is not litigation presently filed by or against the Association. If checked yes, the case is titled: _____ vs. _____, in the _____ Court, County of _____, State of California, No. _____. Please consult the court files for further information regarding the status and nature of the litigation.

7. OWNER OCCUPANCY.

According to the records of the Association, approximately _____% of the units or lots are owner occupied. The Association has not verified the accuracy of this information with individual owners.

The fee for providing the above documentation is \$ _____.

Association's authorized representative _____ Date _____
Telephone _____ Fax _____ E-mail _____

Receipt of the above information and documents is acknowledged:

Owner _____ Date _____ Buyer _____ Date _____

Owner _____ Date _____ Buyer _____ Date _____

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