



Project Legal Name	
City and State	
# Of units in project:	
Source of Information:	
Date:	

- | | | | | | |
|----|---|-----|-------|----|-------|
| 1. | Are the units owned fee simple, not leasehold? | Yes | _____ | No | _____ |
| 2. | Is the project subject to a recreational/land lease? | Yes | _____ | No | _____ |
| 3. | Does the project contain any governmentally regulated low to moderate income units also known as inclusionary zoning? | Yes | _____ | No | _____ |
| 4. | Does the project have a mandatory club membership? | Yes | _____ | No | _____ |
| 5. | Are the units subject to "private transfer fee covenant"? | Yes | _____ | No | _____ |
| 6. | Is the Association subject to any lawsuits or pre-litigation activity? | Yes | _____ | No | _____ |
| 7. | Are there any special assessments ongoing or planned? If so, why? | Yes | _____ | | _____ |

What is the amount of special assessment & length of special assessment?

- | | | | | | |
|-----|--|-----|-------|----|-------|
| 8. | To the best of your knowledge, is the HOA aware of any deficiencies within the project related to safety, soundness, structural integrity, or habitability of the project's buildings? | Yes | _____ | No | _____ |
| 9. | To the best of your knowledge, has the project received directions from a regulating or inspection agency to make repairs due to unsafe conditions? | Yes | _____ | No | _____ |
| 10. | Has the HOA or Developer retained any right of first refusal? | Yes | _____ | No | _____ |
| | If yes, are the mortgagees excluded from this right of first refusal? | Yes | _____ | No | _____ |
| 11. | Are there short-term rentals? | Yes | _____ | No | _____ |
| | If yes, what is the minimum number of days allowed? _____ | | | | |
| 12. | Is the HOA a licensed Hotel, Motel, Resort or Hospitality Entity? | Yes | _____ | No | _____ |
| 13. | Does the project offer Hotel Services? | Yes | _____ | No | _____ |
| 14. | Does the management company or HOA also handle rentals of units? | Yes | _____ | | _____ |
| 15. | Does the project have hotel or resort ratings through booking or travel websites? | Yes | _____ | | _____ |
| 16. | Does the HOA or legal documents require owners to make units available for rental pooling? | Yes | _____ | No | _____ |
| 17. | Does the HOA or legal documents require owners to share profits from rental or units with the HOA, Management Company or resort/hotel rental company? | Yes | _____ | No | _____ |
| 18. | Are there any occupancy limits or blackout dates? | Yes | _____ | No | _____ |
| 19. | Are there any interior decorating or furnishing restrictions? | Yes | _____ | No | _____ |
| 20. | How many unit owners are delinquent more than 60 days? | | | | |
| | What is the dollar amount of these delinquencies? | | | \$ | _____ |