



COASTAL ASSOCIATION SERVICES, INC.  
970 West Valley Parkway, #651  
Escondido, CA 62025  
760-749-4400

## Ordering Instructions: HOA Documents & Condo Questionnaires

**Before calling or emailing Coastal with questions about the request/order process, please read this page and the attached order form in full.** We have worked hard to ensure all ordering information is provided.

1. Complete the attached order form, including all required information; be sure to specify delivery method
2. **Forward your completed order form together with**, up-front fees made payable to Coastal Association Services, & Lenders / FHA / VA Questionnaire (if applicable) to the above noted address. Please do not call and ask if they can be submitted separately

### **Please Note:**

- **ONLY cashier's checks, money orders, escrow/lender checks or cash are acceptable methods of payment.** Failure to submit certified funds such as personal checks will result in a 2 week hold being placed on your request to ensure funds clear the bank. **NO EXCEPTIONS.**
  - **Do not submit orders via email and then mail payment separately.** All orders must be submitted together to be considered complete. Orders must include: payment, our completed order form, and questionnaires (where applicable). Failing to do so will result in a delayed delivery of orders.
  - **Our above Address is a PO Box located inside a Postal Annex.** You may deliver your completed order by courier, FedEx, UPS, overnight or US Post. The address listed above is our mailing address **not our physical office.** **We do not have walk in services.** If walking your order in to the mailing address location or send it by courier, **your order must be in a sealed, properly addressed envelope.**
3. **Mail is picked up every business day in the early morning.** Any mail that comes in after we have picked up the mail, will be picked up on the next business day and processed as of the business date received. i.e. mail delivered on Saturdays or Holidays will not be considered delivered until the next business day regardless of carrier tracking delivery notice.
  4. **If you do not order a rush, your order will not be rushed under any circumstances.** It is your responsibility to read this document and our order form to determine if you need to order a rush. The clock for turn time starts the next business day following our receipt of your order, allowing us time to pick up, sort, forward orders to the correct department, process the incoming orders, compose and forward confirmation emails.
  5. **Confirmation of receipt** will be sent via email, to the email address you provide on the order form, confirming our receipt of your order and the expected delivery date of your order. **DO NOT CALL AND EMAIL ASKING IF WE HAVE RECEIVED YOUR ORDER!!** Please allow 24 to 48 hours for confirmation, allowing us to pick up mail, sort it to the correct department, enter orders into our system, compose and send your email confirmation. Thank you in advance for your cooperation.

# COASTAL ASSOCIATION SERVICES

## REQUEST FOR CERTIFICATION AND/OR DOCUMENTS

For Office Use Only	
Received	
Due	

**WE MUST HAVE PAYMENT IN FULL, TOGETHER WITH THIS COMPLETED ORDER FORM, IN OUR OFFICE, BEFORE WE CAN PRODUCE ANY PROPERTY/UNIT INFO OR DOCUMENTS. ONLY INITIALED ITEMS WILL BE PRODUCED.**

### NO CREDIT CARDS, BUSINESS or PERSONAL CHECKS ACCEPTED

**\*Cash, Cashiers Check, Money Order, Lender or Escrow Check ONLY \***

By completing this form, you are ordering the information indicated below in connection with an escrow and/or finance transaction of a property/unit within an association managed by Coastal Association Services. Submitting this form shall be seen as confirmation that the owner of subject property has authorized requesting party to act on their behalf and hereby authorizes Coastal Association Services to release information in all matters concerning the association and selling member, including but not limited to unresolved violations, pending litigation or any other condition. We agree to pay Coastal Association Services the total amount due for the items requested prior to the release of any documents. Our signed copy of this form, will be binding upon the requesting party. A \$50.00 cancellation fee applies when notification of cancellation is provided in less than 24 hours before ordered deadline. Cancellation must be made to a live CAS team member. Any other form of cancellation and or nonpayment of ordered services will be persuade for full payment.

**Be advised that the below address is a PO Box mailing address at "Postal Annex"; Your request may be delivered to said address in a sealed, properly addressed envelope. Mail is picked up in the morning each business day. The next business day following the delivery date, is the actual "date received".**

Please allow 24 to 48 hours for confirmation email, allowing us to pick up, sort and enter all orders into our system

Initial below to confirm	Price	<b>NORMAL TURN AROUND TIME IS SEVEN (7) BUSINESS DAYS</b> <small>Business hours are, Mon - Fri 9:00am to 4:00pm • All Bank &amp; Postal Holidays are observed</small>
Initial Here	\$225.00	<b>BASIC ESCROW DOCUMENTS</b> Includes Certificate of Insurance, Articles of Incorporation, Budget, most recent Reserve Study, Bylaws, Collection Policy, Condo Plan, Owner's Rights, Rules & Reg's, most recent Profit & Loss, 1yr meeting minutes (if available) and Escrow Demand.
Initial Here	\$65.00	<b>CC&amp;R's</b> (Usually provided by Title Company)
Initial Here	\$85.00	<b>Escrow Demand Only (no docs included)</b>
Initial Here	\$195.00	<b>Lenders Questionnaire (Proof of insurance is included)</b> ***You must provide a questioner when submitting your order
Initial Here	\$95.00	<b>Mini Lenders Questionnaire NO MORE THAN 4 QUESTIONS/NO DOCS!</b> ***You must provide a questioner when submitting your order
Initial Here	\$300.00	<b>FHA / VA Approval Questionnaire NO DOCS!</b> ***You must provide a questioner when submitting your order
Initial Here	\$35.00 PER	<b>INDIVIDUAL DOCUMENTS;</b> specify: _____
<b>*Coastal reserves the right to refuse rush orders based on work load and or improperly submitted orders.</b>		
Initial Here	\$65.00	<b>* Three Business Days After</b> Order is received. Docs available after 3:00pm 3rd business day.
Initial Here	\$95.00	<b>*48 Hour Rush After</b> Order is received. Docs available after 3:00pm 2nd business day.

Sellers/Present Owners Name: \_\_\_\_\_

Subject Property Address: \_\_\_\_\_

Requesting Parties Company Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Delivery (**circle one**): email, UPS or FedEx ( you must provide prepaid postage and packaging ) \_\_\_\_\_

Confirmed by my signature below, I am ordering the information initialed above and agree to the terms, conditions and charges.

Signature: \_\_\_\_\_ Name (Please print): \_\_\_\_\_

Date: \_\_\_\_\_ Email Address: \_\_\_\_\_

\*\*\*REQUIRED: If we can't make out your email, address we can't provide order receipt confirmation or estimated date of delivery.

**\*\*\* Make checks payable to Coastal Association Services**

**\*\*\* Checks for outstanding or future assessments should be made payable to the HOA.** If you are unsure of the HOAs name please contact our office at [info@CoastalAssociationServices.com](mailto:info@CoastalAssociationServices.com) to avoid applying payments to the unintended unit account.

**970 West Valley Parkway, #651  
Escondido, CA 92025  
760-749-4400**

[info@CoastalAssociationSrevices.com](mailto:info@CoastalAssociationSrevices.com)

Office Use Only	
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