



COASTAL ASSOCIATION SERVICES, INC.
970 West Valley Parkway, #651
Escondido, CA 62025
760-749-4400 ~ fax 760-749-4004

Order Instructions: HOA Documents & Condo/Lender Certifications

Before calling or emailing Coastal with questions about the 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**, initial next to item you need to order, and complete the bottom of the form.
2. **Mail your completed order to the provided address, together** with; 1.) the completed order form, 2.) check for up-front fees made payable to **Coastal Association Services**, and (if applicable) 3.) Lenders Questionnaire

DO NOT SUBMIT ORDERS, QUESTIONAIRES AND PAYMENT SEPARATELY OR BY EMAIL! It will delay your order delivery.

Please Note:

- **Cashier's Checks, Money Orders, Escrow Checks or Cash are approved methods of payment.**
Submitting business or personal checks will result in a **2 week hold** to ensure funds clear, **NO EXCEPTIONS.**
 - **Do not submit orders via email and mail payment separately.** Orders are not considered complete without including payment, our completed order form, and lenders questions (where applicable) submitted together.
Failing to submit a completed order will result in delivery delays.
 - Our mailing address (shown above and at the bottom of the attached form) is a **PO Box** located at "**Postal Annex**", we DO NOT have walk in services.
 - If dropping your order, or sending by courier to our mailbox address, **your order must be in a sealed, properly addressed envelope.** Postal Annex employees are not Coastal Employees.
3. **Mail is picked up every business day in the early morning.** Mail that comes in after our daily pick up, will be picked up on the next business day, but will be processed based on the actual business day received. ie mail delivered on weekends or holidays is not considered received until the next business day regardless of courier or tracking confirmations.
 4. **If you do not order a rush, your order will NOT be rushed under any circumstances.** It is the responsibility of the ordering party to read these instructions, and to best determine if a rush is needed to meet your escrow/lending deadlines.
 5. A confirmation email will be sent to you within 48 hours of receiving, confirming receipt of your order and the expected delivery date of your order. **DO NOT Call or Email asking for status of your order.**

Thank you in advance for your professional 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 persued 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	NORMAL TURN AROUND TIME IS SEVEN (7) BUSINESS DAYS Business hours are, Mon - Fri 9:00am to 4:00pm • All Bank & Postal Holidays are observed
Initial Here	\$380.00	BASIC ESCROW DOCUMENTS 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. CC&Rs Not Included
Initial Here	\$95.00	CC&R's (Usually provided by Title Company)
Initial Here	\$160.00	Escrow Demand Only (no Docs included)
Initial Here	\$490.00	Lenders Questionnaire (Proof of insurance is included) ***You must provide a questioner when submitting your order (no Documents Included)
Initial Here	\$600.00	FHA / VA Approval Questionnaire NO DOCS INCLUDED! ***You must provide a questioner when submitting your order
Initial Here	\$45.00 Each	INDIVIDUAL DOCUMENTS; Circle Needed Docs: Bylaws, Articles of Inc., Current Budget, Reserve Study, Rules & Regs, Elevated Landing Study (SB326), Most Recent P & L and Balance Sheet, Certificate of
Initial Here	\$300.00 \$400.00 Each	Additional Documentation Provide specific list of questions or requested document Circle needed items 300.00 - List of Additional Lender Questions after original order, or \$400.00 to create documentation demanded by Lender
*Coastal reserves the right to refuse rush orders based on work load and or improperly submitted orders		
Initial Here	\$300.00	* Three Business Days <u>After</u> Order is received. Docs available after 3:00pm 3rd business day.
Initial Here	\$400.00	* 48 Hour Rush <u>After</u> 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 of all documents is by email. **Please confirm Email Address:** _____

If we can't make out your email, address we can't provide order receipt confirmati

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 estimate

*** **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 to avoid applying payments to an unintended unit account.

MAILING ADDRESS: 970 West Valley Parkway, #651
 Escondido, CA 92025
 760-749-4400

Last Updated 6-1-2026

info@CoastalAssociationSrevices.com

Office Use Only	
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