

# VACATION OWNERSHIP SERVICES

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## COMPLETING OPENING DOCUMENTS

Here's how to approach completing the opening documents:

1

### Current Owner Information

OPENING ORDER WORKSHEET	
<b>CURRENT OWNER(S)/SELLER(S) INFORMATION:</b>	<small>(If more than 2 Sellers, please use separate sheet and include name, address &amp; email) (If a seller is married or divorced, please notate - may be relevant I Community Property States)</small>
Seller 1: _____	Seller 2: _____
<small>(Show full names as owner took title. If deceased, please make note)</small>	
Mailing address: _____	
Seller 1 Email: _____	Seller 2 Email: _____
Primary Seller Phone Number: _____	
Purpose of Change (Check all that apply): <input type="checkbox"/> Trust / <input type="checkbox"/> Divorce / <input type="checkbox"/> Gift / <input type="checkbox"/> Add Member / <input type="checkbox"/> Death / <input type="checkbox"/> _____	

This should reflect exactly how the owners appear on the current recorded deed.

- If this is due to divorce: list both names as they originally took title.
- If one party has remarried: list their current name and note the new spouse in parentheses if applicable.
- If someone has legally changed their name: list the current legal name and note the former name in parentheses.
- If this is due to death: list the deceased owner and write “(deceased)” next to their name.

I also need mailing address, email, and phone contact for each seller, if different from Seller 1.

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### New Owner Information

<b>NEW OWNER(S)/BUYER(S) INFORMATION:</b> <small>(Show full legal name(s) as shown on government issued IDs) (you must communicate if Buyers are married to each other or to someone else – required for proper vesting)</small>	
Buyer 1: _____	Buyer 2: _____
Relationship of Buyer 1 & Buyer 2 (for vesting): <input type="checkbox"/> Married / <input type="checkbox"/> Individuals / <input type="checkbox"/> Trust / <input type="checkbox"/> Other	
Mailing address: _____	
Buyer 1 Email: _____	Buyer 2 Email: _____
Primary Buyer Phone Number: _____	

This section is who will appear on the new deed.

- If it's just you — you are Buyer 1
- If you are married and your spouse will also be on title — include both names.
- If you are married but your spouse will NOT be on title — that must be disclosed in the vesting section.

Please use full legal names exactly as shown on government ID.

I also need mailing address, email, and phone contact for each buyer, if different from Buyer 1.

### 3

#### Resort Information

**RESORT INFORMATION:** Please refer to your Resort billing statement.

Resort Name: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_

Resort Management Company: \_\_\_\_\_ Phone: \_\_\_\_\_

Resort Account Reference Number: \_\_\_\_\_ Unit Number: \_\_\_\_\_ Week/Interval: \_\_\_\_\_

You can copy this directly from your most recent billing statement:

- Resort Name
- Account Number
- Unit / Week
- Management Company

### 4

#### SERVICES REQUESTED (VERY IMPORTANT)

**SERVICE REQUESTED** (check):  
 Timeshare Transfer: -  With Money  Without Money  
 Quit Claim Deed  Warranty Deed  Title Search  
 Title Insurance (certain xfers may require a Title Search & Title Insurance regardless if checked)

Please check the boxes that match what you want us to do:

- **Timeshare Transfer: With Money** (purchase price involved)
- **Timeshare Transfer: Without Money** (gift / divorce / internal family transfer / \$0 consideration)
- **Quit Claim Deed** (most common for timeshare transfers)
- **Warranty Deed** (less common; may require additional title review depending on jurisdiction)
- **Title Search** (if requested or if required for the type of deed/transfer)
- **Title Insurance** (only when applicable; in some cases title search/insurance may be required)

If you're unsure which deed type applies, just tell me the purpose of the transfer (divorce, gift, sale, trust, etc.) and I'll advise what is typically used in that jurisdiction (without providing legal advice on vesting).

If no money is changing hands, simply enter \$0.

Indicate who is paying closing costs and who is responsible for current HOA dues.

If you want this completed within two weeks, you may select the expedite option.

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### Escrow Information

#### ESCROW INFORMATION:

Purchase Price (write \$0 if without consideration): \$\_\_\_\_\_ How much has seller received from buyer: \$\_\_\_\_\_

All Closing Costs Paid By:  100% Seller  100% Buyer  50%/50% split between Seller and Buyer

Buyer's First Year of Use: \_\_\_\_\_ Current Year HOA Dues Paid By:  100% Seller  100% Buyer

If the Seller has paid current Years HOA Dues, is Buyer going to Reimburse the Seller?  Yes  No

Expedite Fee  (requires \$150 extra fees paid in advance. Deed prepared within 2 weeks depending on jurisdiction)

Any Additional Information or purpose of transfer & relationship of SELLER & BUYER **[REQUIRED]:**

\_\_\_\_\_

This section prevents misunderstandings later. Please complete as follows:

- **Purchase Price:**
  - If **no money** is changing hands, write **\$0**.
  - If money is involved, enter the agreed purchase price.
- **How much has seller already received from buyer:** enter amount received so far (or \$0).
- **All closing costs paid by:** choose Seller / Buyer / 50-50.
- **Buyer's first year of use:** enter the first year the Buyer will have occupancy rights.
- **Current year HOA dues paid by:** choose Seller or Buyer.
- **If Seller paid current year HOA dues, will Buyer reimburse Seller?** Yes/No.
- **Expedite option:** check only if you want expedited processing (additional fee).
- **ADDITIONAL INFORMATION (REQUIRED)**

Please write 1–2 sentences about:

  - the purpose of the transfer (divorce / gift / sale / trust / etc.)
  - the relationship between the parties (ex-spouses, siblings, parent/child, etc.)
  - anything unusual (one party unavailable, POA, name change, etc.)

## OTHER VOSTA DOCUMENTS

### BUYER VESTING WORKSHEET (HOW THE NEW OWNER HOLDS TITLE)

This section tells me how to draft the deed (sole owner, joint tenancy, tenants in common, trust, etc.).

BUYER VESTING INFORMATION WORKSHEET						
VOSTA is authorized to show vesting on the quitclaim deed to record transferring title to the new owner						
<b>Name of new owner(s) and status :</b>						
<i>(If new owner is married to someone who will not be on the deed, that must be disclosed in the NOTES section.)</i>						
Grantee 1 Name _____	<input type="checkbox"/> Married <input type="checkbox"/> Unmarried <input type="checkbox"/> Widowed <input type="checkbox"/> Corp <input type="checkbox"/> Trust					
Grantee 2 Name _____	<input type="checkbox"/> Married <input type="checkbox"/> Unmarried <input type="checkbox"/> Widowed <input type="checkbox"/> Corp <input type="checkbox"/> Trust					
Relationship to Grantee 1: <input type="checkbox"/> Married <input type="checkbox"/> Unmarried						
<b>PLEASE MARK APPROPRIOTE CHOICES FOR VESTING</b> Select Only One of the following:	<b>NOTES</b> <table border="1"><tr><td> </td></tr><tr><td> </td></tr><tr><td> </td></tr><tr><td> </td></tr><tr><td> </td></tr></table>					
<input type="checkbox"/> Husband and Wife / Wife and Husband <input type="checkbox"/> A Married Man <input type="checkbox"/> A Married Woman <input type="checkbox"/> An Unmarried Man <input type="checkbox"/> An Unmarried Woman						
Select Only One of the following						
<input type="checkbox"/> Registered Domestic Partners (jurisdiction where registered) _____						
<input type="checkbox"/> Joint Tenants with Right of Survivorship						
<input type="checkbox"/> Sole Ownership						
<input type="checkbox"/> Tenants In Common List Ownership % by owner _____						
<input type="checkbox"/> Tenants by the Entirety						
<input type="checkbox"/> Trust If you select this option, please list the full name of the Trust and the name of each Trustee:						
COMPLETE THIS SECTION IS FOR BUYER TRUST ONLY / make sure to submit trust documentation						
Name of the Trust (including date): _____						
Trustee Name: _____						

- I can't choose vesting for you — if you're unsure, I recommend confirming with a qualified attorney/CPA.

## FinCEN Compliance (If Applicable)

### FinCEN Compliance Certification & Fee Acknowledgment

This transaction involves a Buyer/Transferee that is an Entity or Trust. Federal regulations under 31 CFR 1031.320 require the collection and reporting of certain information to FinCEN.

By signing below, the undersigned acknowledges that:

- Required ALTA FinCEN Collection Forms must be completed in full.
- The information provided will be used for federal reporting.
- A \$175 FinCEN Administrative Compliance Fee applies to this transaction.

Buyer/Transferee Entity: \_\_\_\_\_

Buyer/Transferee Designate Name: \_\_\_\_\_

Authorized Signature: \_\_\_\_\_

Date: \_\_\_\_\_

If the new owner is a trust or entity (LLC, corporation, etc.), federal regulations require additional reporting forms (these will come later).

There is a \$175 compliance fee only when the buyer is a trust or entity.

Death transfers, divorce transfers, and certain estate planning transfers may be exempt.