

Records Copy Request/Request for Inspection

Instructions: This request form must be completed by any owner desiring to inspect or receive copies of any Association books of account, meeting minutes, membership roster, or other Association documents. A minimum of five business days is needed to process a request. If there is a question with any request, the owner will be notified within a reasonable amount of time of the reason for any delay.

The Association requires that the owner provide the reason for each record requested and the intended purpose of the request to protect the Association and personal confidences where necessary. The Association's goal and intent is to allow inspection of most Association documents. However, given the personal and legal nature of some documents, the Association must place reasonable restrictions on the inspection process. This includes a requirement that any inspection take place in the presence of an Association representative.

Inspections of the Association's records will take place during normal business hours at:

_____.

Copying charges are ____ per page and a minimum clerical fee of ____ for the copying of pages 1 through 50 plus an additional clerical fee of ____ for every additional increment of 50 pages copied. The actual cost of all mailing charges will also be the owner's responsibility. To preserve the sanctity of the records, a physical records inspection requires the presence of a staff member.

You, the owner, agree to pay ____ per hour in quarter hour increments for staff attendance at the records inspection. All inspection, copying, and mailing charges will be assessed to the home owner's account or paid in advance, as the Board so decides.

This form must be completed in full, signed, and dated in order to process the request.

Owner's Name: _____

Address: _____ Phone Number(s): _____

Record Requested

Reason and Purpose of Request

- | | | | |
|----|-------|---|-------|
| 1. | _____ | / | _____ |
| 2. | _____ | / | _____ |
| 3. | _____ | / | _____ |
| 4. | _____ | / | _____ |

Preferred inspection dates and times:

Do you anticipate making copies of any records to be inspected? ____Yes/____No

If you prefer receipt of copies of the records listed above via regular U.S. Mail to an actual inspection, please check here: ____

Requests for mailed copies of records will be filled within ____ business days of receipt. The charges listed in the instructions will be assessed to your account. If the charges are expected to exceed \$25.00, do you wish to receive a total estimate of the charges before receiving the records?
____Yes/____No

I hereby agree not to use or distribute any information or documents obtained from the inspection or copying of any Association records for any reason or purpose other than as stated above. I agree to indemnify, defend, and hold Big Turtle II Condominium Unit Owners' Association, Inc., its board members, officers, and its managing agent, and their respective successors, heirs, and assigns, harmless from any claim made or damage sustained by any person arising from, related to, or concerning my inspection, use, or receipt of copies of Association records for any reasons or purposes other than as stated above. I further consent and agree that all inspection and copying charges incurred in accordance with this request, as outlined above, will be assessed to my account or paid in advance, as directed by the Board.

Owner Signature

Date

RECORDS AVAILABLE FOR INSPECTION

The Association's Board may withhold from inspection any records that in its reasonable business judgment would:

- Constitute an unwarranted invasion of privacy;
- Constitute privileged information under the attorney-client privilege;
- Involve pending or anticipated litigation or contract negotiations; and/or
- Involve the employment, promotion, discipline, or dismissal of a specific Board Member or employee

ALL REQUESTS FOR RECORDS MUST BE IN WRITING

An owner who wants to inspect or copy the Association's records must submit a written request to the Board or Manager. The request must specify the particular record(s) desired, including pertinent time periods, and shall state whether the request is for inspection or copying. The request must be sufficiently detailed to allow the Association to retrieve the record(s) requested.

ONLY OWNERS OR AUTHORIZED REPRESENTATIVE MAY INSPECT

Every owner shall have the right to inspect or copy the Association's records in compliance with the rules and procedures contained in this policy.

An owner may authorize, in writing, an attorney or other designated representative to conduct this inspection or request copies on the owner's behalf.

RULES OF CONDUCT AND PROCEDURE GOVERNING REQUEST TO INSPECT/COPY

All inspections shall take place at the Association's office or at such other location as the Board designates. No owner shall remove original records from the location where the inspection is taking place.

The Association shall make records available for inspection on or before the ____ business day after the Association actually receives the written inspection request. This time frame may be extended if the records requested are so voluminous or otherwise in such condition as to render this time frame unreasonable. The Association will notify the owner (by telephone, in person, by email, or in writing) that the records are available, and specify the time, date, and place for the inspection.

No owner shall alter Association records in any manner.

All people inspecting or requesting copies of records shall conduct themselves in a businesslike manner and shall not interfere with the operations of the Association's office or such other location where the inspection or copying is taking place. The Association office, or place of inspection or copying, shall assign one staff person to assist in the inspection. All requests for further assistance and copying during an inspection shall be directed only to that one staff person.

During an inspection, the owner may designate for copying such records by use of a tab, clip, or Post-It note upon the page(s) desired.

Owners shall not exercise their inspection or copying rights to harass any other owner or resident, board member, its managing agent, officer, director, or employee.

CHARGES FOR COPIES/INSPECTION

Upon written request, owners shall be provided meeting minutes at no charge.

Other than meeting minutes, the owner must pay ____ per page for copying regular or legal sized records. In addition, the owner must pay a minimum clerical fee of ____ for the copying of pages 1 through 50 plus an additional clerical fee of ____ for every increment of 50 pages copied thereafter.

To preserve the sanctity of the records, a physical records inspection requires the presence of a staff member. The owner must pay ____ per hour in quarter hour increments for staff attendance at the records inspection.

The owner must pay the costs of copying and/or inspection at the time of billing for copies or actual inspection. However, the Board may, in its sole discretion, require advance payment.