



# CLIENT INTAKE FORM

*All information provided will be used solely for the purpose of completing a condominium document review. Reviews are based on the documents and information supplied. No legal or accounting advice is provided.*

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## 1. Client Information

- **Client Name(s):**
  - **Email Address:**
  - **Phone Number:**
  - **Preferred Method of Contact:** ☐ Email ☐ Phone ☐ Text
  - **Are you the:** ☐ Buyer ☐ Seller ☐ Owner ☐ Realtor ☐ Lawyer ☐ Other: \_\_\_\_\_
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## 2. Property Information

- **Condominium Name (if applicable):**
  - **Condominium Corporation Number:**
  - **Property Address (Unit #, Building, City):**
  - **Province:**
  - **Type of Condo:** ☐ Apartment ☐ Townhouse ☐ Bare Land ☐ Mixed-Use
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## 3. Transaction Details

- **Purpose of Review:** ☐ Purchase ☐ Sale ☐ Refinance ☐ Information Only
  - **Offer/Condition Removal Date (if applicable):**
  - **Possession Date (if known):**
  - **Urgency Level:** ☐ Standard ☐ Rush (additional fees may apply)
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#### 4. Document Package Provided

*Please check all documents included in your package.*

- ☐ Information statement / Estoppel / Status Certificate
  - ☐ Financial Statements (most recent)
  - ☐ Current Budget
  - ☐ Reserve Fund / Reserve Study
  - ☐ Bylaws
  - ☐ Rules & Regulations
  - ☐ Management Agreement
  - ☐ Insurance Certificate
  - ☐ AGM Minutes (last 12–24 months)
  - ☐ Board Meeting Minutes
  - ☐ Special Assessments (if applicable)
  - ☐ Other (please specify – e.g., engineering assessments, major capital expenditures, building condition reports, environmental reports): \_\_\_\_\_
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#### 5. Financial & Operational Details (if known)

- **Current Condo Fees (\$/month):**
  - **Are there any Special Assessments?** ☐ Yes ☐ No ☐ Unknown
    - If yes, please describe amount and duration:
  - **Litigation (current or pending)?** ☐ Yes ☐ No ☐ Unknown
  - **Arrears Level Noted?** ☐ Yes ☐ No ☐ Unknown
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## 6. Specific Concerns or Focus Areas

*Please note any specific questions or concerns you would like addressed in the review (e.g., finances, reserve fund, bylaws, pet restrictions, rentals, parking, governance, upcoming repairs):*

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## 7. Delivery & Acknowledgements

- **Preferred Report Delivery:** ☐ Email ☐ PDF Download
- **Do you acknowledge that this review is not legal, accounting, or engineering advice and is based solely on the documents provided?** ☐ Yes
- **Do you acknowledge that fees are due in advance of the review?** ☐ Yes

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## 8. Authorization

I authorize Clearview Condo Review to review the documents provided and prepare a summary report based on the information supplied.

- **Client Signature:** \_\_\_\_\_
- **Date:** \_\_\_\_\_

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*Thank you for choosing Clearview Condo Review services.*