



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.

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: _____

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

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)

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): _____

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

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):

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

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:** _____

Thank you for choosing Clearview Condo Review services.