



Condominium/PUD Project Questionnaire

TO BE COMPLETED BY HOA OR MANAGING AGENT

WHOLESALE MORTGAGE BANKERS

Borrower Name: _____ Loan # _____ Unit # _____

Project Name: _____

Address: _____

City: _____ State _____ Zip Code _____

Project and Unit Information

- | | | | |
|--------------------------------|-----------------------------------|-------------------------------------|---|
| 1. Project is: | 2. Unit is: | 3. Units are: | 4. Unit owners in control of HOA? |
| <input type="checkbox"/> Condo | <input type="checkbox"/> Attached | <input type="checkbox"/> Fee Simple | <input type="checkbox"/> Yes, as of _____ / _____ (MM/YYYY) |
| <input type="checkbox"/> PUD | <input type="checkbox"/> Detached | <input type="checkbox"/> Leasehold | <input type="checkbox"/> No |
5. Are all units construction complete?
 Yes, year built: _____
 No, est. completion date: _____
- 5a. Are all common elements and amenities complete?
 Yes
 No, incomplete items: _____
6. Is the project a legally phased project?
 Yes, # of phases planned: _____
 No
- 6a. If yes, is the project subject to additional phasing/annexation/add-ons?
 Yes - please complete New Construction/Conversion box below.
 No

Provide the following information for residential units only:

- | | |
|---|---|
| _____ 7. Total # buildings in project | 14. Project design type: |
| _____ 8. Total # units in project | <input type="checkbox"/> Garden / Low-rise |
| _____ 9. Total # units, primary/2nd home, closed | <input type="checkbox"/> Row / Townhouse |
| _____ 10. Total # units, primary/2nd home, under contract, not closed | <input type="checkbox"/> Mid-rise (5-7 stories) |
| _____ 11. Total # units, investor/sublet, closed | <input type="checkbox"/> High-rise (8+ stories) |
| _____ 12. Total # units, investor/sublet, under contract, not closed | 15. Predominant building type: |
| _____ 13. Total # units developer/sponsor owned, unsold | <input type="checkbox"/> Attached <input type="checkbox"/> Detached |

***New Construction or Conversion Projects ONLY -- Subject Legal Phase Information**

<input type="checkbox"/> New Construction OR	<input type="checkbox"/> **Conversion, date converted: _____ / _____ (MM/YYYY)
--	--

Building #'s for phase: _____

_____ Total # units in phase	**If Conversion, was there a complete gut and rehab of all the building mechanicals and interior components? <input type="checkbox"/> Yes <input type="checkbox"/> No
_____ Total # units, primary/2nd home, closed	
_____ Total # units, primary/2nd home, under contract, not closed	
_____ Total # units, investor/sublet, closed	
_____ Total # units, investor/sublet, under contract, not closed	
_____ Total # units developer/sponsor owned, unsold	
_____ Total # units substantially complete (all the units in the building are complete, subject to the installation of buyer selection items, such as appliances)	

- YES NO
16. Is project part of a "Master" or "Umbrella" Association?
If YES, please list the name of Master Association: _____
17. Does any single entity, individual or group own more than 10% of the total units?
If YES, please list name and # of units: _____
18. Project with 10 units or less, does any single entity, individual or group own more than 1 unit?
If YES, please list name and # of units: _____

YES NO

- 19. Does project/building contain commercial/non-residential space?
If YES, % of total square footage: _____ %, purpose of space: _____
- 20. Are any non-incidentual business units owned or operated by the HOA (e.g., restaurant, spa, health club, etc.)?
If YES, the non-incidentual business is: _____
- 21. Are any units subject to Affordable Housing or Age Restrictions?
If YES, list restrictions and unit #s: _____
- 22. Is the lender liable for delinquent common charges if the unit is foreclosed on OR prior to the lender acquiring the property?
If YES, lender is responsible for _____ months.
- 23. Do unit owners have sole ownership & exclusive right to project facilities?
- 24. Are any project facilities (parking, recreation facilities) leased to the HOA?
- 25. Does the project consist of manufactured housing units?
- 26. Is the HOA party to any current or pending litigation (excluding foreclosure or collection actions)? If YES, provide written details separately.
- 27. Are any units less than 400 square feet?
- 28. Are any of the units used for "live-work" (e.g., the unit owner lives in a loft area and runs a business on the ground floor)?
- 29. Is the project a Continuing Care Retirement Community or Life Care Facility where residents sign long-term contracts for housing, medical, assisted-living, and other services?
- 30. Is the project a condotel? (Does the project include registration services & offer rentals on a short term basis ? Does the project have a website that presents itself as a hotel, resort, inn, motel, lodge, or other hospitality entity? Are amenities such as food, phone, or daily cleaning services offered?

31. # of units that are over 60 days delinquent in common charges/HOA fees. _____ units / Total amount delinquent \$ _____

32. Monthly HOA Dues: \$ _____ / per month

Insurance Information

- 33. Insurance Carrier _____
Agent Name _____ Phone# _____ Email _____
- 34. Does the HOA Property insurance (Hazard, Building) cover the interior fixtures of the units, including walls, cabinetry, flooring, appliances etc.? Yes No

HOA Management Information

- 35. Is HOA professionally managed? Yes No
If yes, provide name & contact information for the management company
Company Name: _____
Contact Name: _____ Phone# _____

Certification

- 36. The undersigned hereby certifies that to the best of their knowledge and belief, the information and statements contained on this form and any attachments are true and correct. The undersigned further represents they are authorized by the Homeowner's Association Board of Directors to provide this information on behalf of the Association

Contact Name: _____ Date: _____
Company Name: _____ Title: _____
Signature: _____ Phone#: _____