



Condominium Checklist

www.donnashi.com

donna@donnashi.com 760-699-7877

Main Phone: 760-200-3402

Fax: 760-517-9091

PROJECT		
CITY	STATE	ZIP

DATE OF THIS SUBMISSION: _____

DOCUMENTS REQUIRED (*) Necessary for Initial Review

HOA CERT *

LEGAL DOCUMENTS

(DECLARATION OF CONDO/CC&R'S OR MASTER DEED/MASTER TRUST)*

SITE PLAN, PLOT PLAN, PARCEL MAP

BY-LAWS *

ANNEXATION/PHASING (IF APPLICABLE)

ARTICLES OF INC. (IF REQUIRED PER STATE LAW)

<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>

Recorded

Recorded

Recorded if required

Recorded

State Seal

INSURANCE DOCUMENTS

DEC PAGE-HAZARD/LIABILITY*

INSURANCE/FIDELITY > 20 UNITS

INSURANCE/FLOOD - if in Zone A or V

FULL MASTER INSURANCE POLICIES (FHA/VA)

<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>

Current Policy

FINANCIAL DOCUMENTS

BUDGET (PROJECTED)*

BUDGET/ACTUAL/PREVIOUS YEAR OR P&L (FHA)

BALANCE SHEET & P&L WITHIN 90 DAYS (FHA)*

RESERVE STUDY (SOMETIMES MANDATORY)

<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>

OTHER DOCUMENTS

EXECUTED MANAGEMENT AGREEMENT

IF ASSOCIATION HAS A LOAN, THEN COPY OF NOTE, BALANCE,
AMOUNT DUE PER UNIT

REASON FOR LOAN IF APPLICABLE

SPECIAL ASSESSMENT INFORMATION WHY AND PER UNIT

***NEW CONSTRUCTION DOCUMENTS - WE WILL PROVIDE YOU WITH A
SEPARATE LIST IF APPLICABLE**

2-4 UNIT CONDOMINIUM PROJECTS

RECORDED MEMORANDUM OF UNDERSTANDING

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CONVERSION < 2-3 YEARS, DEPENDING ON AGENCY

STRUCTURAL ENGINEER REPORT

PHOTOS

RESERVE STUDY

COPY OF PERMIT/SIGN-OFF FINAL INSPECTION

Note: The more complete the submission is to us, the fewer reviews
and/or additional documents you will need to provide.

All documents listed above is required for submission to an agency
Additional documentation may be required based on the review of
Documents provided.

Submitted by:

Name
Company
Title
Phone number
Email