**Date:** Click or tap to enter a date.

**Account Executive:** Click or tap here to enter text.

**Loan Number:** Click or tap here to enter text.

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| --- |
| **BROKER INFORMATION** |
| **Company Name:** Click or tap here to enter text. |
| **Loan Officer:**Click or tap here to enter text. | **Phone:**Click or tap here to enter text. | **Email:**Click or tap here to enter text. |
| **Project Name:** Click or tap here to enter text. | **Address:**Click or tap here to enter text. |

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| 1. **Are all common elements and/or facilities substantially complete?**
 | [ ]  **Yes** | [ ]  **No** |
| 1. **Is the project subject to additional phasing and add-ons?**
 | [ ]  **Yes** | [ ]  **No** |
| **If yes, number of additional phases and units to be built:**  | **Phases:** Click or tap here to enter text. | **Units:** Click or tap here to enter text. |
| 1. **Is the project a conversion of an existing building?**
 | [ ]  **Yes** | [ ]  **No** |
| **If yes, was conversion a full gut-rehabilitation?** | [ ]  **Yes** | [ ]  **No** |
| 1. **Date control of the HOA transferred from the developer to unit owners:**
 | Click or tap to enter a date. |

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| --- | --- | --- |
|  | **Entire Project** | **Subject Phase** |
| 1. **Total number of units**
 |  |  |
| 1. **Number of residential units sold and closed**
 |  |  |
| 1. **Number of owner-occupied units**
 |  |  |

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| --- | --- | --- |
| 1. **Does any one person or entity own more than 10% of the project**
 | [ ]  **Yes** | [ ]  **No** |

|  |  |  |  |
| --- | --- | --- | --- |
|  | **30-59 days** | **60-89 days** | **90+ days** |
| 1. **How many units are over 60 days delinquent?** Click or tap here to enter text.
 |  |  |  |

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| --- | --- | --- |
| 1. **Is the HOA involved in any litigation, mediation, arbitration, or other dispute resolution process?**
 | [ ]  **Yes** | [ ]  **No** |
|  **If yes, explain:** Click or tap here to enter text. |
| 1. **Does the Owner’s Association have a reserves fund separate from the operating account?**
 | [ ]  **Yes** | [ ]  **No** |
| 1. **Are the units owned in fee simple or leasehold?**
 | [ ]  **Fee Simple** | [ ]  **Leasehold** |
| 1. **Are the amenities/recreational facilities owned by the HOA?**
 | [ ]  **Yes** | [ ]  **No** |
| 1. **Does the property operate as a resort hotel: renting units on a daily basis?**
 | [ ]  **Yes** | [ ]  **No** |
| **If yes, number of years in operation** | Click or tap here to enter text. |
| **Please check applicable services:** | [ ]  **Restaurant/food service** | [ ]  **Daily maid service** | [ ]  **Check-in rental desk** |
| [ ]  **Commercial (boutiques, etc.)** | [ ]  **Mandatory rental pool** | [ ]  **Timeshare** |
| 1. **Is any part of the project used for commercial purposes?**
 | [ ]  **Yes** | [ ]  **No** |
| **If yes, what percentage of square footage?**  | Click or tap here to enter text.**%** |
| 1. **Is HOA named insured on master insurance policy?**
 | [ ]  **Yes** | [ ]  **No** |
| 1. **Are common elements/limited common elements insured to 100% replacement cost?**
 | [ ]  **Yes** | [ ]  **No** |
| **Coverage: $** Click or tap here to enter text. | **Deductible: $** Click or tap here to enter text. | **Expiration Date:** Click or tap to enter a date. |
| 1. **Is the HOA insured for general liability?**
 | [ ]  **Yes** | [ ]  **No** |
| **If yes, amount per occurrence:** | **$** Click or tap here to enter text. |
| 1. **Is the HOA insured for Fidelity Bond?**
 | [ ]  **Yes** | [ ]  **No** |
| **If yes, amount carried by management company:** | **$** Click or tap here to enter text. |
| 1. **Monthly HOA fee for subject unit:**
 | **$** Click or tap here to enter text. |

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| **The above information was obtained from the following representative of the project’s Homeowners Association.** |

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| --- | --- |
| Click or tap here to enter text. | Click or tap here to enter text. |
| **Name** | **Phone** |

|  |
| --- |
| Click or tap here to enter text. |
| **Position/Title** |

|  |  |
| --- | --- |
| Click or tap here to enter text. | Click or tap here to enter text. |
| **Reviewer’s Signature** | **Date** |