**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** |

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| --- | --- | --- | --- |
|  | **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.** |

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

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| --- |
| 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** |