



Conventional Condo Questionnaire – LCOR / RefiNow / RefiPossible

Project Name:	
Property Address:	
City, State, Zip:	
County/Borough:	HOA Tax ID#:

Section 1: General Project Information

1	Total # of Buildings in entire project	
2	Total # of Residential Units	

Section 2: Condominium Characteristics

3	Hotel/motel/resort services (not limited to registration services, daily or short-term rentals, daily cleaning services, central telephone service or key systems, and restrictions on interior decorating?)	YES	NO
4	Professionally managed by a hotel or resort management company that also facilitates short term rentals for unit owners or projects with management companies that are licensed as a hotel, motel, resort, or hospitality entity?	YES	NO
5	Mandatory or voluntary rental pooling arrangements, or other restrictions on the unit owner's ability to occupy the unit?	YES	NO
6	Units that are less than 400 square feet, interior doors adjoining units, or mini kitchens?	YES	NO
7	Restrictions on year-round occupancy (e.g., blackout dates, timeshares, or segmented ownership)	YES	NO

Section 3: Building Safety, Structural Integrity, Soundness, or Habitability

8	When was the last building inspection by a professional or authority?		
9	Did the last inspection find significant deferred maintenance or unsafe conditions?	YES	NO
	9a. If YES, have recommended repairs been completed?	YES	NO
	9b. Do the findings relate to safety, soundness, structural integrity, or habitability?	YES	NO
	<i>Please provide a copy of the inspection and HOA meeting minutes to document findings and action plan.</i>		
10	Is the HOA aware of any significant deferred maintenance or unsafe conditions that were not reported on the last inspection?	YES	NO
11	Are there any outstanding building enforcement code issues at this time or expected in the future? If YES, please provide notice from the authority.	YES	NO
12	Does the project have a preventative maintenance plan and schedule?	YES	NO
	12a. If YES, are reserves being adequately funded to support these?	YES	NO
13	Has the HOA had a reserve study completed on the project within the past 3 years?	YES	NO
	13a. If YES, is the HOA following the recommendations of the study?	YES	NO
14	Does the HOA maintain separate operating and reserve accounts?	YES	NO
15	What is the total income budgeted for the current year?		
16	What are total reserves budgeted for the current year?		
17	What is the current reserve account balance?		
18	Are there any current special assessments or future contemplated special assessments against unit owners? If YES:	YES	NO
	18a. What is the total amount of the special assessment?		
	18b. What are the terms of the special assessments?		
	18c. What are the special assessments for?		
	<i>Please provide copies of the HOA meeting minutes</i>		



19	Has the HOA incurred any loans to finance improvements or deferred maintenance?			YES	NO
	19a. Amount borrowed?				
	19b. Terms of repayment?				

Section 4: Master Insurance

20	Does the Master Policy cover (SELECT ONE) :				
	<input type="checkbox"/>	Bare Walls	<input type="checkbox"/>	Walls-In to Original Plans and Specs	<input type="checkbox"/>

Section 5: Management Company & Preparer Information

I, the undersigned, certify that to the best of my knowledge and belief, the information and statements contained on the form and the attachments are true and correct.

Company Name: _____

Address: _____

Preparer's Name:	Title:
Preparer's Signature:	Phone #:
Email Address:	Date Completed: