

Condo Project Questionnaire

PROJECT & BORROWER INFORMATION

Project and Borrower Information

PROJECT LEGAL NAME DATE

PROJECT PHYSICAL ADDRESS (STREET, CITY, STATE, ZIP)

BORROWER NAME UNIT NUMBER TQL LOAN NUMBER

TO BE COMPLETED BY PROPERTY MANAGEMENT OR AN OFFICER OF THE ASSOCIATION.

PROJECT INFORMATION

Unit Counts — Please provide actual numbers, not percentages, thank you.

CATEGORY	SUBJECT / LEGAL PHASE	ENTIRE PROJECT
Total # of Units	<input type="text"/>	<input type="text"/>
Owner Occupied + 2nd Homes	<input type="text"/>	<input type="text"/>
Investment Units	<input type="text"/>	<input type="text"/>
Units Sold or Under Contract	<input type="text"/>	<input type="text"/>
Units Listed for Sale	<input type="text"/>	<input type="text"/>
Other	<input type="text"/>	<input type="text"/>

PROJECT CHARACTERISTICS

1. Does the project offer any of the following? Check all that apply

- Hotel / Resort Activities, Services, or Fees
- Rental Pooling or Daily Rental Operation
- Spa, Salon, or Housekeeping Services
- On-Site or Centralized Reservation / Registration
- Food / Beverage Service or Room Service
- Other Hotel-Like Amenities

YES / NO QUESTIONS

Project Status & Governance

- 2** Is the project 100% complete (all phases, units, and common areas)? Yes No
- If Yes — please explain*
- 3** Has a Certificate of Occupancy been issued for the subject legal phase? Yes No
- If Yes — please explain*
- 4** Are the unit owners in control of the HOA? Yes No
- If Yes — please explain*
- 5** If the project is NOT complete, is the subject legal phase substantially complete? Yes No
- If Yes — please explain*
- 6** Does the developer retain ownership in the project besides unsold units? Yes No
- If Yes — please explain*
- 7** Is the HOA or developer involved in any litigation, arbitration, receivership, bankruptcy, deed-in-lieu, or foreclosure? Yes No

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YES / NO QUESTIONS (CONTINUED)

Ownership, Restrictions & Financials

- 8 Does the project have mandatory upfront membership fees for recreational amenities owned by an outside party? Yes No
- If Yes — please explain*
- 9 Do project documents give a unit owner or other party priority over the rights of the first mortgagee? Yes No
- If Yes — please explain*
- 10 Does commercial / non-residential space exceed 50% of the total project? Yes No
- If Yes — please explain*
- 11 Does any single entity own more than 20% of the units in the project? Yes No
- If Yes — please explain*
- 12 Are there any deed or resale restrictions on the project or any individual unit? Yes No
- If Yes — please explain*
- 13 Is the HOA aware of any deficiencies related to the safety, soundness, structural integrity, or habitability of the building(s)? Yes No
- If Yes — please explain*
- 14 Are there any outstanding jurisdictional violations related to safety, soundness, or habitability? Yes No
- If Yes — please explain*
- 15 Does the project have a funding plan and schedule for deferred maintenance items? Yes No
- If Yes — please explain*
- 16 Has the HOA had a reserve study completed within the past 3 years? Yes No
- If Yes — please explain*
- 17 Are there any current or planned special assessments unit owners are obligated to pay? Yes No
- If Yes — please explain*
- 18 Has the HOA obtained any loan(s) to finance improvements or deferred maintenance? Yes No
- If Yes — please explain*
- 19 Is the subject unit less than 500 square feet? Yes No

NUMERIC DETAILS

Delinquencies & Reserves

OF UNITS 60+ DAYS DELINQUENT ON HOA DUES (INCL. REQ)

TOTAL CURRENT RESERVE ACCOUNT BALANCE (\$)

CURRENT SPECIAL ASSESSMENT TOTAL (\$)

HOA LOAN AMOUNT (\$)

CERTIFICATION

Signed by Property Management or HOA Officer

TITLE / ROLE

DATE SIGNED