



Limited Review of Condo/PUD Projects

Project: _____

Address: _____

Borrower(s): _____

of Units in the Project _____

of Units Sold (closed and title conveyed by the Developer to Unit Owners) _____

of Owner-Occupied Units (Primary Residences and Second Homes) _____

of Non Owner-Occupied Units (Investment/Rental units) _____

(If <90% of total units have been conveyed to unit owners, stop here and request our New Project questionnaire.)

Table with 3 columns: Question, YES, NO. Contains 14 numbered questions regarding project ownership, completion, and financials.

Name of Agent/Insurance Company: _____

Phone Number: _____

I am an authorized HOA officer or director, a management company agent, or an attorney for the HOA, and the above statements are true and accurate to the best of my knowledge and belief.

Name - Please Print _____

Title _____

Signature _____

Date _____

Phone: _____

Fax or email: _____

Please fax the completed form to: _____ at _____