

# The Coastal Lending Group

95 Enterprise, Suite 360 Aliso Viejo, CA 92656  
949-916-6505 P 949-272-3715 F

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## HOMEOWNERS ASSOCIATION CERTIFICATION

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DATE \_\_\_\_\_ LOAN# \_\_\_\_\_ APPLICANT: \_\_\_\_\_

PROJECT NAME AND ADDRESS: \_\_\_\_\_ OCCUPANCY: \_\_\_\_\_%

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- 1) Total number of units in project: \_\_\_\_\_
- 2) Number of units sold and closed: \_\_\_\_\_
- 3) Number of units sold, but not closed: \_\_\_\_\_
- 4) Number of units rented: \_\_\_\_\_
- 5) Does one entity own more than 10%: Yes\_\_\_\_No\_\_\_\_
- 6) Number of units still owned by developer: \_\_\_\_\_
- 7) Are there multiple sales to one investor?: Yes\_\_\_\_ No\_\_\_\_  
If yes, list breakdown:  
\_\_\_\_\_
- 8) Is there an age restriction?: Yes\_\_\_\_ No\_\_\_\_ If yes, age \_\_\_\_\_
- 9) Monthly HOA Fee \$ \_\_\_\_\_

### RENTAL INFORMATION

- 10) Is there an on-site rental office? Yes\_\_\_\_ No\_\_\_\_
- 11) Is project subject to rental pools or time share agreements?: Yes\_\_\_\_ No\_\_\_\_
- 12) Can units be rented on a daily basis? Yes\_\_\_\_ No\_\_\_\_

### FINANCIAL INFORMATION

- 13) Are there any special assessments pending or levied? Yes\_\_\_\_ No\_\_\_\_  
If yes, explain \_\_\_\_\_
- 14) Is the HOA involved in any current or pending litigation? Yes\_\_\_\_ No\_\_\_\_  
If yes, explain: \_\_\_\_\_
- 15) Reserves budgeted for this year: \_\_\_\_\_
- 16) Total income budgeted for this year: \_\_\_\_\_
- 17) Number of unit owners more than 1 month delinquent in HOA dues: \_\_\_\_\_

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## CONSTRUCTION STATUS

- 18) Are the units and common areas owned in: Fee Simple\_\_\_\_\_ Leasehold\_\_\_\_\_
- 19) Are the common areas and recreational facilities owned in:  
Fee Simple\_\_\_\_\_ Leasehold\_\_\_\_\_
- 20) Date control of the association turned/will turn over from developer to  
unit developers? \_\_\_\_/\_\_\_\_/\_\_\_\_
- 21) Is the project a conversion? Yes\_\_\_ No\_\_\_  
If yes, year converted:\_\_\_\_\_
- 22) Have all units, common areas and facilities been completed?  
Yes\_\_\_ No\_\_\_ If yes, explain\_\_\_\_\_
- 23) Is the project subject to future add-ons/phasing/annexation? Yes\_\_\_\_\_ No\_\_\_\_\_
- 24) If Site Condominium (detached), are all units in project detached? Yes\_\_\_ No\_\_\_
- 25) Is HOA subject to a master umbrella association? Yes\_\_\_ No\_\_\_  
If yes, are all common areas and facilities complete? Yes\_\_\_ No\_\_\_
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## CERTIFICATION BY OFFICIAL REPRESENTATIVE OR DESIGNEE

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I certify that the information represented on this form is true and correct to the best of my knowledge.

Name of Association

Signature

Association Address

Name/Title

City, State, Zip

Telephone

Date

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