



CondoSmart Inc.
323 Silver Valley Blvd NW,
Calgary, Alberta T3B 4B7

Phone: (403) 247-2802

Fax: (403) 247-7560

Email: condosmart@condosmart.net

Website: <http://www.condosmart.net>

DOCUMENTS REQUIRED CHECKLIST

Please put a check beside the documents you are providing. Space is provided to the reasons the documents are missing or incomplete.

If this is a MLS sale, it is clearly stated that it is the responsibility of the seller to supply the purchaser with documents as outlined in the purchase contract. A full set of documents should be available to a prospective purchaser at the time the offer is made. If this is a private sale, you may want to include this list as part of the offer to purchase.

- Registered Condominium Plan – this can be obtained for a minimal charge from Alberta Land Titles – Plans condensed to a 6” x 8” print are not acceptable. Reducing to this size renders the printing illegible.
- By-laws – current. These should have a plan number on them and the 9 digit title registration number on the front or back page. These can be ordered through SPIN II or through any Alberta Registries office. Any amendments must also be included.
- Annual financial statement and report – this is for the last fiscal year. If the year is complete but the statements are still with the auditor, the unaudited statements are acceptable.
- List of Reserve fund expenses from the last annual financial statements received to the nearest current date.
- Current financial statements – Balance sheet and profit and loss statement. This needs to be as current as possible. All corporations have monthly bills and will have a regular reporting process with the Board.
- Current budget and fee schedule – the current year.



CondoSmart Inc.
323 Silver Valley Blvd NW,
Calgary, Alberta T3B 4B7

Phone: (403) 247-2802

Fax: (403) 247-7560

Email: condosmart@condosmart.net

Website: <http://www.condosmart.net>

- Reserve Fund study, report and plan - Current. Reserve funds are current for only five years. Check the date. The report (spreadsheets) must be attached. Include the condominium plan developed by the Board – or the resolution accepting the reserve fund study and report as the plan.
- Last Annual General Minutes (AGM) – Check this is not the agenda announcing the next AGM date and the circulation of the previous years minutes. AGM minutes are only approved at the next AGM. Check that the minutes you receive are for the most recent AGM.
- Minutes for last twelve months
- Any engineering reports (post tension, structural, water, environmental that are applicable).
- Current insurance certificate
- Current signed Management Agreement
- Policies - Request from the Management Company or the Board of Directors policies that have been passed and are of interest.
- A letter from the management company or Board - detailing any actions commenced against the corporation, details of any unsatisfied judgment or understanding court order against the Corporation and any details of any written demand upon the corporation for payment of an amount in excess of \$5000.
- Full MLS feature sheet with a legal description for the unit and if applicable parking and storage.
- Occupancy letter

Please note – we **will not open** a file until we have received ALL of the above information.



CondoSmart Inc.
323 Silver Valley Blvd NW,
Calgary, Alberta T3B 4B7

Phone: (403) 247-2802

Fax: (403) 247-7560

Email: condosmart@condosmart.net

Website: <http://www.condosmart.net>

We require **two full business** days to complete the report and **two full business** days following to meet with the client. Appointments are not scheduled until we receive the documents we deem necessary to complete a beneficial report. You are advised that because questions often arise from the client meeting, we feel some time should be made available for follow up. We therefore strongly suggest the condition date not fall on a weekend or holiday and at least a grace of one business day be given between the client meeting and the condition date. Moving the condition date may be necessary. To accommodate this flexibility, **it is suggested that the conditions read: "5 business days from the receipt of ALL requested documents"**.