



## ASSESSMENT QUESTIONNAIRE

To be completed by the Homeowners Association:

### Section One: Contact & General Information

Name of Preparer	
Title of Preparer	
Preparer's Company Name	
Preparer's Phone	
Preparer's Email	
Preparer's Company Address	
Date Completed	
Project/HOA Name:	
Project Physical Address:	
Subject Property Address/Unit	

### Section Two: Additional Assessment Details

Additional Assessment Current or Planned	Assessment 1	Assessment 2	Assessment 3
Brief Reason for Assessment:			
Total Amount Assessed:			
Repayment Start Date:			
Repayment End Date:			
Repayment Amount per Unit:			
What is the estimated cost of repairs?			
Have all Repairs been completed?			
Has total cost of Repairs been paid?			
Additional Detail related to subject Unit (if applicable)			
<b>Provide Detailed List of Repairs needed for Assessment 1 in the Line Below</b>			
<b>Provide Detailed List of Repairs needed for Assessment 2 in the Line Below</b>			
<b>Provide Detailed List of Repairs needed for Assessment 3 in the Line Below</b>			



### Section Three: Extent of Current Repair Needs

Extent of Any Needed Repairs:	
1. Does the Project Currently have any repairs/improvements requiring a Certificate of Occupancy? If Yes, provide detailed explanation below.	
2. Does the project have any outstanding Failed Regulatory Inspections? If Yes, provide detailed explanation below.	
3. Has the project failed to qualify for re-certification? If Yes, provide detailed explanation below.	
4. Will there be/or has there been Full or Partial Evacuation of the Building required for an unknown period of time OR more than 7 days to complete Repairs? If Yes, provide a detailed explanation in the line below.	
5. Are any items requiring repair severe enough to affect the safety, soundness, structural integrity or habitability of the improvements? If Yes, provide a detailed explanation in the line below.	
6. Do the improvements need substantial repairs and rehabilitation, including many major components? If Yes, provide a detailed explanation in the line below.	
7. Is safe and sound functioning of one or more of the projects major structural or mechanical elements impeded? This includes, but is not limited to the foundation, roof, load bearing structures, electrical system, HVAC or plumbing. If Yes, provide a detailed explanation in the line below.	
8. If you answered Yes to any of the above questions in this section, please specify if any damage or maintenance is isolated to one or a few units and whether it affects the overall Project safety soundness, structural integrity or habitability of the improvements in the line below.	
9. In the line below, please explain in detail if/how Subject Unit is directly affected by any of the items for which you answered Yes in Questions 1-7 above.	

### Section Four: Financial Analysis

Documentation to Support Impact to the financial stability, viability, condition, and marketability of the project	
If there is a special Assessment is for repairs which DO NOT relate to safety/soundness /structural integrity/habitability vs. Regular Maintenance, financial impact documentation is required.	
1. Provide documentation to evidence total cost of Repair(s).	
2. Provide Payment Plan and Evidence of Payments Made.	
3. Provide any available inspections, engineering or other certification reports specific to the Repairs.	
4. Provide documented evidence of Completion or Enter Estimated Completion Date:	



	5. Provide the following Project Documentation if available to enable us to make a determination if HOA has the ability to fund the repairs.
	a. Current Balance Sheet(s)
	b. Bank Statement(s)
	c. Income Statements
	d. Aging Reports
	e. Reserve Study(ies)

### Section Five: Additional Documentation

The following additional documentation is required for any Project with Deferred Maintenance	
	Provide past 6 Months of project's HOA Meeting minutes.
	Provide all additional available inspections engineering or other certification reports completed within the past 5 years OR HOA to Confirm in writing no inspections, engineering or other certification reports were performed in the past 5 years AND any additional applicable detail to assist with review.