

Uniform Condominium Mortgage Questionnaire

Any lender or financial institution requiring Information not included in this Uniform Mortgage Questionnaire may request the use of their own Questionnaire by visiting www.camcomgmt.com and following the instructions for a Specialized Mortgage Questionnaire.

Community Name: Sample 2016

General Information

1. **The named community is a:** Condominium Homeowner Association (HOA)
Was the community created by the conversion of an existing building? Yes No
If yes, please indicate: Age of building: _____ years.
Type of original use: Choose One
2. **Is the community a legally phased project?** Yes No
If yes, please indicate: Number of units in: Phase 1 _____ Phase 2 _____ Phase 3 _____
Number of phases: Choose One
- Is the community subject to additional annexation or phasing?** Yes No
Description of additional annexation or phasing:
3. **Unit Sales:** Total number of units in project: _____ Total number units conveyed to purchasers: _____
4. **Unit Types:** T/H ; Mid-Rise ; Hi-Rise ; Single Family
Parking Total Spaces: _____ Description: _____
Breakdown of Unit
Sales total number principal residence units conveyed: _____
Total number of offsite addresses: _____
Number of offsite addresses may represent a combination of the following
Total number second home units conveyed: _____
Total number investor-owned units conveyed: _____
Total number retained by developer/converted: _____
5. **Unit Maintenance:** Are the common areas and units well maintained? Yes No
If no, describe the maintenance needed: _____
Date the project was last inspected: _____ / _____ / _____
6. **Does any investor own more than one unit?** Yes No
If yes, identify the investor (the same individual, investor group, partnership, or corporation) and indicate the total number of units owned by each such investor in the project.
Does any investor own more than ten percent of the total units in the project? Yes No
7. **The recreational amenities (other than those in a Master Association) include:** NONE
swimming pool(s) clubhouse tennis courts playground fitness center basketball court
8. **Are all units and facilities complete?** This includes all amenities and common areas such as pools, tennis courts, roads, walkways, parking areas, landscaping, clubhouse, and renovations associated with conversions. Yes No
If no, how many units have been completed? _____
If no, how many phases have been completed? _____ Describe any incomplete item: _____
9. **Can the project be expanded beyond its current size?** Yes No

10. Is the owners' association currently a party to any type of litigation or public administrative action (including any violations of any environmental or public health statutes and laws or current environmental or public health litigation or administrative action)? Yes No

If yes, describe the nature of the litigation or public action and attach any information:

11. Has the owners' association been notified of any violations of any government or land-use regulations (such as zoning ordinances and coastal tideland or wetland laws)? Yes No

If yes, describe the nature of the violations:

12. Is the subject a houseboat project (a boat that has been modified to be used as a residence)? Yes No

13. Is the project a condominium hotel? Yes No

14. Are there any multiple-dwelling unit condominiums in the project (an owner may own more than one dwelling unit evidenced by one note or deed)? Yes No

15. Is the project a legal but non-conforming use of land? Yes No

16. Is this a mixed use development which may include retail/commercial components? Yes No

17. Do the project documents allow the units to be used as timeshares? Yes No

18. Is the project participating in any land use agreements with other developments not controlled by the association? Yes No

Title Information

19. How is title to the units held? Fee Simple

20. Are there any leased recreational facilities or any common-area leases? Yes No

21. Does the unit owner own the lot or land below the unit or an undivided interest in common land? Yes No

22. Do unit owners have sale ownership interest in and the right to the use of the project facilities? Yes No

If no, please explain:

23. Does the developer retain ownership interest in any of the facilities or common areas? Yes No

If yes, please explain:

24. Do the project documents include restrictions on sale that would limit the free transferability of title: (i.e. age restriction, right of first refusal, low-to moderate-income restrictions)? Yes No

If yes, restrictions include:

Rental Information

25. Does the project consist of any leased or rented units? Yes No
26. Is there a rental service for leasing units? Yes No
If yes, participation is:
27. Does the owners' association provide a cleaning service for leased or rented units? Yes No
28. Do the project documents allow the units to be leased or rented for less than a 30-day period? Yes No
29. Are there any other restrictions relating to the term of any lease or rental agreement? Yes No
If yes, do the restrictions include: Copy of lease must be given to Management Company along with tenant contact information? Yes No

Control Transfer Information

30. Has voting control of the Board of Directors been turned over from the builder or developer? Yes No
If yes, date of transfer: / / If no, anticipated date of transfer: / /

Budget/Financial information

31. The owners' association fiscal year is from: to
32. How many budget cycles have been controlled by the unit owners as a majority (as opposed to the developer)?
33. The amount currently held in a segregated reserve fund for future repair and/or replacement of major components of the project is: Total Reserves: \$
34. Does the budget include a 10% reserve? Yes No
35. Does the Homeowners Association maintain separate accounts for the operating expense and reserve accounts? Yes No
36. Does the Association have any outstanding loans? Yes No
If yes, describe the nature of loan, purpose and collateral (if applicable).
37. The unit assessment/common charges for all units are: The Same Charge by Percentage Interest
If the charges are the same, the assessment/common charges are: \$
If the charges are not the same, the assessment/common charges range from: \$ to \$
Frequency with which assessments are charged: Monthly Quarterly Annually
38. Do the unit assessments include any charges for unit utilities? Yes No
If yes, please indicate which utilities: Electric Heat A/C Gas Water
39. At the start of the current fiscal year, how many owners are delinquent more than 30 days in their unit assessment charges? The total amount of outstanding delinquent charges is: \$

40. The total income budgeted for the current year is: \$

41. Are the monthly bank account statements being sent either to the homeowners association or the managing agent? Yes

42. Are any special assessments now approved, or been any in the past two years? Yes No
If yes, describe the special assessment and the total amount of assessment:

Management Information

43. If the project is Managed by a Management Firm Provide the following management contact information:
Company: CAMCO Management Company, 511 West Chester Pike, Havertown, PA 19083. Telephone: 610-446-9292
Fax: 610-446-0125

44. What is the length of the current management contract? _____ years. What is the expiration date of the current management contract? _____ / _____ / _____

45. If a management firm manages the project, is it related to the developer? No

46. Does the management company have fidelity insurance? Yes the amount of coverage is: \$3,000,000.00

47. Does the management contract provide for termination without cause within 90 days or less with written notice? Yes

Commercial Non-Residential Use

48. Is any space within the project designated only for commercial/non-residential use? Yes No
If yes, the number of commercial units is: _____ Title to the commercial units is retained by:
Describe commercial/non-residential units and permitted uses:
Can units be used both as residential and a retail/commercial place of business or professional studio? Yes No

49. What percentage of the community is commercial space? _____ %

Low-and Moderate-Income Housing

50. Does the project contain any governmentally regulated low-and moderate-income housing units (also known as inclusionary zoning)? Yes No
If yes, how many are there? _____ If yes, representing what percent? _____ %

51. Identify units by type/size (i.e.: 1 bedroom, 2 bedroom, etc.):

52. Provide the following municipal regulatory agent contact information:

Name:
Title:
Address:
Telephone:

Master/Umbrella Association Information

53. Is there more than one Association for the project, such as a "Master" or "Umbrella" Association?

(A Master or Umbrella Association is one with separate sub-associations with their own legal documents):

Yes No

If yes, provide the following Master Association information:

The amount of the unit assessment/common charges for the master association is: \$

The frequency in which the master assessments/common charges are due for the unit owners:

Provide a description of the Master Association's amenities:

Date in which the voting control of the master association's board of directors was turned over from the builder:

/ / .

Insurance Information

54. Provide the following information regarding the project's insurance carrier:

Company:

Agent:

Agent Address:

Telephone:

55. What is the amount of coverage on the master insurance policy: \$

Deductible:

Expiration Date: / /

56. Are units or common elements located in a flood zone? Yes No

If yes, is flood insurance in force? Yes No

If flood insurance coverage is in force, does it cover at least 80% replacement? Yes No

If flood insurance coverage is in force, is this coverage maximum available per condominium federal flood program? Yes No

57. Is the HOA insured for fidelity bond? Yes No

If the HOA is insured for fidelity bond, please provide the amount of coverage: \$

58. Provide the minimum number of days required for written notification to be given to the HOA or insurance trustee before any substantial changes or cancellation of the project coverage:

NOTE: Contact the Insurance Agent for the Certificate of Insurance, Declaration of Insurance, Schedule of Insurance, policy number(s) and all other insurance-related information.

Certification

I certify that, to the best of my knowledge and belief, the information and statements contained on this form and attachments (if applicable) are true and correct. The responses herein are made in good faith and to the best of my ability as to their accuracy.

for CAMCO Management

Date Prepared: / /