

Conventional PUD Questionnaire



Last Updated: May 29, 2015

Project Name _____ Loan # _____

Subject Property Street Address _____

City _____ State _____ Zip _____

General Planned Unit Development (PUD) Project Information

1. How many total units in the PUD Project? _____
2. How many units in the Project are Complete? _____
3. Is the Subject Property unit 100% Complete? <input type="checkbox"/> Yes <input type="checkbox"/> No
4. Has the HOA been turned over to the unit owners? <input type="checkbox"/> Yes <input type="checkbox"/> No 4a. If Yes, what date was control turned over? _____
5. Is any part of the project used for Commercial / Non-Residential purposes? <input type="checkbox"/> Yes <input type="checkbox"/> No 5a. If Yes, what % of the total project square footage is commercial space? _____ 5b. If Yes, what type of commercial use? (Retail, Live-Work Units, artist studio) _____
6. Are there Manufactured, Cooperative, Timeshares or Houseboats in the project? <input type="checkbox"/> Yes <input type="checkbox"/> No
7. Does the project operate as a Hotel/Motel offering any hotel type services? <input type="checkbox"/> Yes <input type="checkbox"/> No
8. Does the HOA own or operate any business located inside the Project? <input type="checkbox"/> Yes <input type="checkbox"/> No
9. Is the Project available for year round occupancy to unit owners; with no restrictions? <input type="checkbox"/> Yes <input type="checkbox"/> No
10. Does any single person or entity own more than 10% of the total units in the project? <input type="checkbox"/> Yes <input type="checkbox"/> No 10a. If Yes, how many units are owned by each person or entity? _____ 10b. If the project has < 10 total units, does any single person or entity own > 1 unit? <input type="checkbox"/> Yes <input type="checkbox"/> No 10c. If Yes, how many units are owned by each person or entity? _____
11. Is the HOA currently involved in litigation, mediation, or arbitration? <input type="checkbox"/> Yes <input type="checkbox"/> No <i>If Yes, provide a copy of the complaint, amount of claim, & if the insurance company has been engaged.</i>
12. Does the Project allow >6 months regular assessments to have priority over the mortgage lien? <input type="checkbox"/> Yes <input type="checkbox"/> No
13. Are the units covered under the Homeowner Association's Master / Blanket Insurance Policy? <input type="checkbox"/> Yes <input type="checkbox"/> No 13a. Does the Master/Blanket Insurance Policy cover the interior of the units? (walls-in) <input type="checkbox"/> Yes <input type="checkbox"/> No 13b. Does the Master/Blanket Insurance Policy cover Betterments & Improvements? <input type="checkbox"/> Yes <input type="checkbox"/> No 13c. Is the project located in a Flood Zone? <input type="checkbox"/> Yes <input type="checkbox"/> No

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I, the undersigned, certify that to the best of my knowledge and belief the information and statements contained on the form and the attachments are true and correct.

Signature of HOA Representative or Preparer Printed Name & Title of HOA Rep / Preparer

HOA Rep / Preparer's Company Name Address

Email Address

Phone Number

Date Completed