CLUTCH.
PROPERTY SOLUTIONS

Document Checklist

Document Name	Description	Check
Purchase Agreement (Optional)	PDF	☐
Titles to Residents, Parking & Storage	PDF Format	☐
MLS Feature Sheet	PDF Format or Link	☐
Information Sheet/Manager Disclosure	Signed & Dated	☐
Bylaws Showing Registration #	Current Year	☐
Annual Operating Budget	Current Year	☐
Condo Fee Schedule	Current Year	☐
Copy of Resolution/Agreement on any Levies/Special Assessments	Current or declaration of none	☐
Monthly Financial Statement (most recent available) 1 Month	Including Balance Sheet, Profit/Loss & Budget Comparison	☐
Audited Financial Statement	Prepared by an accountant	☐
Notice of Special Assessments	If there is any	☐
Board Meeting Minutes	For the past 12 months	☐
Most recent AGM Meeting Minutes	Draft is acceptable	☐
Certificate of Insurance	Current Year	☐
SIUD - Standard Insurable Unit Description	PDF	☐
Reserve Fund Study	Full Study & Financial Tables	☐
Reserve Fund Plan	Current Year	☐
Details on Post-Tensioned Cables	Or declaration of none	☐
Engineer/Technical Reports	If your lender requires this	☐
Condominium Additional Plan Sheet from SPIN2/ARLO	Dated for the current month	☐
Condominium Survey Plan	PDF	☐
Management Agreement	Current, signed Agreement	☐
Property Manager's Name/Contact Info	Current & Matching M/A	☐
Any Corporation's Loan Detail	If applicable	☐
Recreation Agreement	If applicable	☐
Lease of parking or Storage Agreement	If not titled	☐
Resident Handbook/Policy Book	If there is any	☐
Newsletters, Policies & Rules	For the past 12 months	☐

Note: *The more documents you can pass along to us, the more comprehensive of a review we can provide.*

Informed decisions reduce liability, create confidence & build trust.