

Sorrento Condominium Association Inc.
Policy: Official Records Requests

Policy Explanation:

The official records of the Association must be maintained within the state for at least 7 years, and must be made available to a unit owner within 5 working days after receipt of a written request by the Board or its designee. The official records must be made available to a unit owner within 45 miles of the condominium or cooperative property, or within the county in which the condominium or cooperative property is located. The Association may comply by having a copy of the official records of the Association available for inspection or copying on the cooperative, condominium, or Association property, or the Association may offer the option of making the records available to a unit owner electronically via the internet or by allowing the records to be viewed in electronic format on a computer screen and printed upon request (print materials charged according to Management Companies fee schedule).

Reference:

Condominium: [Section 718.111\(12\)\(b\)](#), Florida Statutes

Documents Considered Official Records:

Included but not limited to: a copy of the plans, permits, and warranties provided by the developer; a photocopy of the recorded declaration of condominium and recorded bylaws, and amendments to both; a certified copy of the articles of incorporation; a photocopy of the cooperative documents; a copy of the current rules of the Association; minutes of all meetings for the past 7 years; a current roster of all unit owners and their mailing addresses, unit identifications, voting certifications, and, if known, telephone numbers; current insurance policies; current copy of any management agreements, leases or other contracts; bills of sale; accounting records; records of all receipts and expenditures; a current statement of account for each unit; all financial reporting statements; all contracts and bids for work to be performed; ballots, sign-in sheets, and voting proxies up to one year; all rental records, if the Association is acting as agent for the rental of units; a copy of the current question and answer sheet; a copy of the inspection report; and, all other records relating to the operation of the Association. For a complete list of items, please review the following statutory cites: section 718.111(12), Florida Statutes and section 719.104(2), Florida Statutes.

References:

Condominium: Section [718.111\(12\)](#), Florida Statutes, and Rule [61B-23.002\(7\)](#), Florida Administrative Code
Cooperative: Section [719.104\(2\)](#), Florida Statutes

REQUEST TO ACCESS ASSOCIATION RECORDS

Today's Date: _____, 20____.

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THE BOARD OF DIRECTORS OR ITS DESIGNEE OF SORRENTO CONDOMINIUM ASSOCIATION:
I request to inspect and copy the following official records of the Association:

List of each document to be inspected and/or copied	Comments

Name: _____ Unit Number: _____

Telephone Number: _____ Email Address: _____

This request to access records of the Association and records checklist is designed to facilitate the inspection process. Use of this form is recommended, but not required.

DIRECTIONS TO UNIT OWNER: In the space provided above, enter the date and specifically identify and list the documents to be inspected and/or copied. In order to alleviate potential problems and to expedite the process, it is recommended that you narrow your request as much as possible for each issue targeted. Print your name, unit number, and telephone number at the bottom of the page. Send the original to the board or its designee and keep a copy for your use. Delivery of the request to the board or its designee must be made by certified mail to the current Management Company of the Association.

1. The Official Records shall be those records listed in Chapter 718, Florida Statutes as shown on Exhibit "A"
2. A member shall only be allowed to make one (1) request per month to inspect and copy the Official Records.
3. All record requests must be made in writing on the above form. The form(s) must be delivered to the U.S. registered mail or hand delivery.
4. No request is valid until all form(s) are completed in full.
5. The same records may not be requested more than one (1) time within the previous twelve (12) calendar months.
6. A new form must be completed for each new records request.
7. The member shall only be entitled to the Official Record in the format that it is regularly kept by the Association.
8. The Association may impose fees to cover the costs of providing copies of the Official Records, including, without limitation, the costs of copying.

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9. The Board may impose additional restrictions and adopt additional procedures from time to time.

Once the Association has received the request, the Association/Management Company will direct you to the document via www.precedentmgt.com; email you the requested documents or set up an appointment.

List of Official Records Exhibit A

1. A copy of the plans, permits, warranties, and other items provided by the developer pursuant to s.718.301(4).
2. A photocopy of the recorded declaration of condominium of each condominium operated by the Association and of each amendment to each declaration.
3. A photocopy of the recorded bylaws of the Association and of each amendment to the bylaws.
4. A certified copy of the articles of incorporation of the Association, or other documents creating the Association, and of each amendment thereto.
5. A copy of the current rules of the Association.
6. A book or books which contain the minutes of all meetings of the Association, of the board of directors, and of unit owners, which minutes shall be retained forever.
7. A current roster of all unit owners and their mailing addresses, unit identifications, voting certifications, and, if known, telephone numbers. The Association shall also maintain the electronic mailing addresses and the numbers designated by the unit owners for receiving notice sent by electronic transmission of those unit owners consenting to receive notice by electronic transmission.
8. All current insurance policies of the Association.
9. A current copy of any management agreement, lease, or other contract to which the Association is a party or under which the Association or the unit owners have an obligation or responsibility.
10. Bills of sale or transfer for all property owned by the Association.
11. Accounting records for the Association. The accounting records shall include, but are not limited to:
 - a. Accurate, itemized, and detailed records of all receipts and expenditures.
 - b. A current account and a monthly, bimonthly, or quarterly statement of the account for each unit designating the name of the unit owner, the due date and amount of each assessment, the amount paid upon the account, and the balance due.
 - c. All audits, reviews, accounting statements, and financial reports of the Association or condominium.
 - d. All contracts and bids for work performed.
12. Ballots, sign-in sheets, voting proxies, and all other papers relating to voting by unit owners, which shall be maintained for a period of one (1) year from the date of the election, vote, or meeting to which the document relates.
13. A copy of the current question and answer sheet described in s.718.504.
14. All other written records of the Association not specifically included in the foregoing, which are related to the operation of the Association.
15. A copy of the inspection report as described in s.718.301(4)(p).
16. Bids for materials, equipment, or services.

Notwithstanding the above, the following records shall NOT be accessible to unit owners:

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1. Any record protected by the lawyer-client privilege as describes in s.90.502 and any record protected by the work-product privilege, including any record prepared by an Association attorney or prepared at the attorney's express direction; which reflects a mental impression, conclusion, litigation strategy, or legal theory of the attorney or the Association, and which was prepared exclusively for civil or criminal litigation or for adversarial administrative proceedings, or which was prepared in anticipation of imminent civil or criminal litigation or imminent adversarial administrative proceedings until the conclusion of the litigation or adversarial administrative proceedings.
2. Information obtained by an Association in connection with the approval of the lease, sale, or other transfer of a unit.
3. Personnel records of Association or management company employees, including, but not limited to, disciplinary, payroll, health, and insurance records.
4. Medical records of unit owners.
5. Social security numbers, driver's license, credit card numbers, and other personal identifying information of any person.
6. Electronic security measures that are used by the Association to safeguard data, including passwords.
7. The software and operating system used by the Association which allows the manipulation of data, even if the owner owns a copy of the same software used by the Association. The data is part of the official records of the Association.