

Condo Document Checklist

PROPERTY _____

DOCUMENTS NEEDED BY _____

WHY WE ASK

To give your buyer a complete and accurate review, please send the documents below. Items marked with a date rule must be recent. The condo corporation must provide its documents within 10 days of a written request.

1 From the seller / condo manager

Usually supplied by: Listing agent

DOCUMENT	DATE RULE	WHY WE NEED IT
☐ Consolidated information statement	Dated within 30 days	Lawsuits, demands over \$5,000, reserve fund amount, known structural problems, loans
☐ Board meeting minutes	Last 24 months; newest within 3 months	Early warning of repairs, special assessments and disputes
☐ AGM / SGM minutes	Last 2 years, incl. the latest AGM (draft OK)	Owner votes, elections, reserve report
☐ Monthly financial statements	Within 3 months	Current operating and reserve balances
☐ Audited or reviewed year-end financial statements	Last 2 fiscal years	Deficits, debt, reserve history
☐ Current budget and fee schedule	Current fiscal year	The unit's fee and planned contributions
☐ Reserve fund study	Dated within 5 years	30-year repair forecast
☐ Board-approved reserve fund plan and latest annual reserve fund report	Current	Whether the board follows the study
☐ Insurance certificate	Policy in force today	Coverage and deductibles
☐ Standard Insurable Unit Description (SUID)	Current	What the building's insurance covers inside the unit
☐ Registered bylaws and all amendments	Latest registered version	Pets, rentals, renovations, owner responsibilities
☐ Rules and policies	Current consolidated version	Day-to-day restrictions
☐ Management agreement	Current	Who runs the complex and contract terms

DOCUMENT	DATE RULE	WHY WE NEED IT
☐ Notices to owners (assessments, fee changes, projects)	Last 12 months	Money the buyer may owe
☐ Engineering / envelope / roof reports and contractor quotes mentioned in minutes	If any exist	Size of upcoming repairs
☐ Parking, storage or other exclusive use agreements	If any exist	What comes with the unit

2 From the buyer side

Usually supplied by: Buyer's agent (or a registry agent)

DOCUMENT	DATE RULE	WHY WE NEED IT
☐ Signed purchase contract with all schedules	Latest version	Confirms unit, parking, storage, price and condition date
☐ Certificate of title for each title (unit, titled parking, storage)	Current	Legal ownership and registrations
☐ Condominium plan with the Condominium Additional Plan Sheets (CAD)	Registry search within 2 months	Registered bylaws, unit factors, leases, board list
☐ MLS listing / feature sheet	Current listing	Advertised fee, parking and features to cross-check

3 About the purchase

- ☐ Civic address and unit number
- ☐ Legal unit number (from title)
- ☐ Condition date for the document review
- ☐ Buyer's name (for the report cover)

Questions? Contact SoundCondo Docs: Calgary, Alberta | soundcondo.docs@gmail.com