

# REQUEST FOR PROPOSAL WORKSHEET

## Established Condominiums

Project Name: \_\_\_\_\_

Project Street Address: \_\_\_\_\_

City \_\_\_\_\_ County \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

# Residential Units \_\_\_\_\_

# Residential Units Owner Occupied \_\_\_\_\_

# Residential Units Owned as Second Homes \_\_\_\_\_

# Residential Units Owned as Investments \_\_\_\_\_

Does any single investor own more than 10% of the units Yes \_\_\_\_\_ No \_\_\_\_\_

If Mixed-Use project (i.e. residential & commercial):

What is the total square footage of the building? \_\_\_\_\_

What is the square footage allocated to commercial space? \_\_\_\_\_

Year project was completed? \_\_\_\_\_

Date the Unit Owners took control of the Condo Board \_\_\_\_\_

# Units delinquent on assessments greater than 30 days \_\_\_\_\_

Does the current year budget include a replacement reserve line item equal to 10 % of the annual budget? Yes \_\_\_\_\_ No \_\_\_\_\_

Is the Condo Association subject to any pending litigation? Yes \_\_\_\_\_ No \_\_\_\_\_  
If Yes, provide a separate explanation

Are there, or have there been any special assessments? Yes \_\_\_\_\_ No \_\_\_\_\_  
If Yes, provide a separate explanation

Does the Condo Association have any outstanding loans? Yes \_\_\_\_\_ No \_\_\_\_\_  
If Yes, provide a separate explanation

Are there any Live / Work units in the project? Yes \_\_\_\_\_ No \_\_\_\_\_

Are there any affordable housing deed restrictions? Yes \_\_\_\_\_ No \_\_\_\_\_

Do the condo documents contain leasing restrictions? Yes \_\_\_\_\_ No \_\_\_\_\_

Do condo documents contain Right of First Refusal language? Yes \_\_\_\_\_ No \_\_\_\_\_

Do the condo documents require payment of a fee upon the transfer / sale of a unit? Yes \_\_\_\_\_ No \_\_\_\_\_  
If Yes, provide a separate explanation

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## CONTACT INFORMATION

### PARTY REQUESTING PROPOSAL

Contact Person: \_\_\_\_\_

Company: \_\_\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone: \_\_\_\_\_ Cell: \_\_\_\_\_

Email: \_\_\_\_\_

Additional Contact: \_\_\_\_\_

Phone: \_\_\_\_\_ Cell: \_\_\_\_\_

Email: \_\_\_\_\_

### PROFESSIONAL MANAGEMENT COMPANY (if any)

Contact Person: \_\_\_\_\_

Company: \_\_\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone: \_\_\_\_\_ Cell: \_\_\_\_\_

Email: \_\_\_\_\_

Additional Contact: \_\_\_\_\_

Phone: \_\_\_\_\_ Cell: \_\_\_\_\_

Email: \_\_\_\_\_

### ATTORNEY REPRESENTING CONDO BOARD

Contact Person: \_\_\_\_\_

Company: \_\_\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone: \_\_\_\_\_ Cell: \_\_\_\_\_

Email: \_\_\_\_\_

Additional Contact: \_\_\_\_\_

Phone: \_\_\_\_\_ Cell: \_\_\_\_\_

Email: \_\_\_\_\_