

Limited/Streamline Review Uniform Condominium Questionnaire (QM Loan)

Project Legal Name:		HOA Preparer Name:	
Project Address:		Position/ Title:	
Lender Loan#:		Phone:	
Subject Property:		Email:	
Borrower Name:		Date:	

1. Building Type (subject property) Detached ☐ Attached ☐
2. Has control of the owners association been turned over to the HOA? Yes ☐ No ☐
 If Yes, date of the transfer: _____ If No, estimated date of transfer: _____

3. What's the monthly HOA Fee? _____

4. Total number of phases: _____ Subject Phase # _____

	Entire project:	Subject phase:
a. Total number of units:		
b. Total number of units for sale:		
c. Total number of units sold:		
d. Total number of units rented		
e. Total number of owner occupied units		

5. Does the project contain any of the following? Yes ☐ No ☐
- a. Hotel/motel/resort activities, mandatory or voluntary rental pooling arrangements, or other restrictions on the unit owner's ability to occupy the unit. Yes ☐ No ☐
- b. Manufactured homes Yes ☐ No ☐
- c. Mandatory fee-based memberships for use of project amenities or services . Yes ☐ No ☐
- d. Supportive or continuing care for seniors or for residents with disabilities. Yes ☐ No ☐

6. Is the project Leasehold Estate or A Fee? Leasehold ☐ Fee Simple ☐

7. Please indicate the highest number of units by a single entity owner in the project: _____

8. Is there any space that is used for nonresidential or commercial purposes?
(This is required even if the commercial portion of the building/project has a separate association). Yes ☐ No ☐
- a. If Yes, What percentage of the project? _____



9. If a unit is taken over in foreclosure or deed-in-lieu, is the mortgagee (lender) responsible for delinquent HOA dues?

Yes

No

If Yes, are they responsible for:

0-6 months

7+ months

10. Is there any pending litigation involving the homeowner's association?

Yes

No.

**If Yes, provide a letter of explanation for litigation from the attorney. Additional condition may apply.

11. Is there any deferred maintenance?

Yes

No

**If Yes, provide the reserve studies or other substantially similar documentation

12. Are there any special assessments unit owners are obligated to pay?

Yes

No

If Yes, complete lines a-d

a. Total amount of the special assessment(s) _____

b. Monthly payment _____

c. Terms of the special assessment(s) _____

d. Purpose of the special assessment(s) _____

