

AVENBURY LAKES HOMEOWNERS ASSOCIATION, INC.
REQUEST TO INSPECT RECORDS

RECORDS AVAILABLE FOR INSPECTION

- A) Unless otherwise prohibited by law or this policy, any owner may examine and copy (including receiving copies or other information by email) the Association's books, records, and financial reports from **THE LAST FIVE YEARS ("Records")**, when requested in accordance with this policy.
- B) An owner may NOT examine or copy any Records that contain any information about:
- 1) Personnel matters including but not limited to salary/wage rates/benefits information, performance reviews, applications, disciplinary action, and health matters.
 - 2) Communications with legal counsel or attorney work product pertaining to potential, threatened, or pending litigation or property related matters.
 - 3) Contracts or transactions currently under negotiation or information that is contained in a contract or other agreement containing confidentiality requirements. Any proposed contract/proposal that has not been accepted/signed and finally contracted by the Association.
 - 4) Enforcement of the Declaration, Bylaws, or rules against other owners or occupants.
 - 5) Matters or issues the disclosure of which is prohibited by State or federal law.

Homeowners who satisfactorily complete a "Request to Inspect Records" form (see attached), giving **specific detail** as to the reason and purpose of the request, **to the satisfaction of the Board of Directors or their agent**, should expect a **response from the Information Center within 24 hours of the receipt of the written request. The response will consist of an estimate of time, and associated costs, needed to appropriately complete the request.** Once timing and cost estimates are accepted by the owner a date for review or pick-up of the appropriate requested information will be given, as well:

- **Written** requests on **the attached form** should be submitted in person or by mail. Appropriate information can be picked up/reviewed at the Information Center at 2122 Southampton Lane. There will be a charge for duplication/email creation of the appropriate material requested, except for a request for a copy of meeting minutes, financial reports and/or budgets which **accumulatively** take less than 15 minutes to compile and/or copy. These specific documents are on site and can be reviewed at no cost. A request for copies/email creation, of **other types of documents** shall incur charges of \$.15 per page, plus handling/labor fees of \$15.00 for every fifty (50) pages copied. Mailing any copied information will also require postage fees be charged.

- Requests, of any materials, taking more than 15 minutes **to compile for emailing and/or copy** will be billed at an equivalent \$15.00 dollars per hour labor plus copy and paper costs of \$.15 per page. These requests may require off site research and compiling. Mailing the information will also require additional appropriate postage fees be charged.

If the Owner is requesting an inspection an Association representative will be present, every attempt to honor that request will be made. However, if only copies are requested, no representative will need to meet with the Owner. Inspections of the Association's records must take place during normal business hours with a preset appointment at the office of the Association's Community Manager, located at, 2122 Southampton Lane, Avon, Ohio 44011.

Invoices/Contracts: associated charges as defined above,

- An Owner can request copies of paid invoices. Copies do not require a representative meeting with the Owner. Inspections require a representative be present.
- An Owner can request copies of approved contracts, but no competitive bids will be available for review, copy and/or distribution.
- A form must be submitted citing the specific reason for the request and the purpose of the request **explained in detail and to the satisfaction of the Board of Directors or their agent.** If the purpose is not stated, or is not complete with acceptable specific details, the Board will ask for more information which may delay the fulfilling of the request.

Adopted October 17, 2022, by the Board of Directors.

**AVENBURY LAKES HOMEOWNERS ASSOCIATION, INC.
REQUEST TO INSPECT RECORDS FORM**

Unless otherwise prohibited by law or this policy, any owner may examine and copy (including receiving copies or other information by email) the Association's books, records, and financial reports from **THE LAST FIVE YEARS ("Records")**, when requested in accordance with this policy.

Instructions: This request form must be completed by any Owner desiring to inspect or receive copies of any permitted Association documents (see attached policy statement). A minimum of twenty-four (24) hours is needed after Owner's acceptance of any associated costs and timing. The Association's intent is to allow inspection of most Association documents. However, given the personal, proprietary, and legal nature of some documents, the Association must place reasonable restrictions on the inspection and copy process.

Request for documents that take less than 15 minutes: Copying charges shall be \$.15 per page, plus a handling/labor fee of \$15.00 dollars for every fifty (50) pages copied or compiled for email submission. Mailing information will also require that appropriate postage fees be charged.

Requests for documents taking more than 15 minutes to complete: Will be billed at an equivalent \$15.00 dollars per hour labor plus copy and paper costs of \$.15 per page. These requests may require off site research and compiling. Mailing the information will also require additional appropriate postage fees be charged.

All appropriate labor costs, copying and mailing charges are the responsibility of the Owner and are payable in full prior to the Owner's receiving any copies, email and/or document review

This form must be completed in full, signed, and dated to process the request.

UNIT OWNER'S NAME: _____

UNIT NUMBER: _____

PHONE NUMBER(S): _____

If the request is made through an owner's agent or attorney, please attach a copy of the owner's signed authorization of the agent or attorney's appointment.

Please list and number the Association records you wish to inspect, as allowed by the Association's Policy (please be as specific as possible):

(over)

For each of the records listed and numbered, please provide the reason and purpose for the inspection request. If additional room is needed, please attach a sheet hereto:

	<u>Record Requested</u>	<u>Reason and Purpose of Request</u>
1.	_____	_____
2.	_____	_____
3.	_____	_____
4.	_____	_____
5.	_____	_____
6.	_____	_____

Preferred inspection dates and times: _____

Do you anticipate making copies of any records to be inspected?

_____ Yes _____ No

If you prefer mail receipt of copies or email receipt of the records listed above to an actual inspection, please check here: _____.

Requests for mailed/email copies of records will be filled within three (3) weeks of receipt. The charges listed in the instructions will be assessed to your account. If the charges are expected to exceed \$50.00, do you wish to receive a total estimate of charges before receiving the requested documents? _____ Yes _____ No

Confidentiality and Waiver Clause

I hereby agree not to use, distribute, or disseminate any information or documents obtained from the inspection or copying of any Association records as authorized by the policy for any reason or purpose other than is stated above. I agree to indemnify, defend, and hold Avenbury Lakes Homeowners Association, Inc., its Board of Directors and its managing agent, and their successors, heirs, and assigns, harmless for any claim or damage made or sustained by any person arising from, related to, or concerning my inspection or receipt of copies, or email of Association records. I further consent and agree that all inspection, or email compilation and copying charges incurred pursuant to this request, as outlined above, will be assessed to my account if not previously paid in full.

DATE

UNIT OWNER'S SIGNATURE

Adopted: October 17, 2022, by Board of Directors