

[ASSOCIATION NAME]

[ASSOCIATION STREET ADDRESS], [CITY], FL [ZIP]

REQUEST TO ACCESS ASSOCIATION RECORDS

DIRECTIONS TO THE OWNER: Enter today's date below. In the spaces provided, identify and list each record you want to inspect or copy, and the period each one covers. The more specific the list, the faster and more complete the answer. You do not have to state a purpose or a reason. Deliver the completed form to the association at the address below and keep a copy for yourself. The association completes the second half of this form and returns it to you with the records.

Today's Date: _____, 20____.

PART 1. OWNER'S REQUEST

SEND THIS REQUEST TO

Association: [ASSOCIATION NAME]

Attention: [TITLE OF THE RECORDS DESIGNEE]

Mailing address: [RECORDS REQUEST MAILING ADDRESS], [CITY], FL [ZIP]

Email: [RECORDS REQUEST EMAIL ADDRESS]

Management company, if one receives requests: [MANAGEMENT COMPANY, CONTACT, AND ADDRESS, OR "NONE"]

HOW THIS REQUEST WAS DELIVERED Mark one.

- ☐ Certified mail, return receipt requested. Tracking number: [CERTIFIED MAIL TRACKING NUMBER]
- ☐ Hand delivery on [DELIVERY DATE] at [DELIVERY TIME]
- ☐ Email
- ☐ Other: [DESCRIBE HOW IT WAS DELIVERED]

YOUR RIGHTS ON THIS REQUEST

- You do not have to state a purpose or a reason for this request.
- You may authorize someone else to inspect and copy the records for you.
- You may photograph the records with your own phone, tablet, or scanner instead of buying copies, at no charge for the device.
- The association must make the records available within 10 working days after it receives this request. In a homeowners' association the count is 10 business days.
- If the association misses that deadline, minimum damages of \$50 per calendar day, for up to 10 days, can begin to run on the eleventh working or business day after it received this request.
- Some records are closed by law. If the association withholds a record, it must tell you which record it withheld and the reason.

ABOUT YOU

Name: [YOUR FULL NAME]

Unit, lot, or parcel: [YOUR UNIT, LOT, OR PARCEL]

Property address: [YOUR PROPERTY ADDRESS]

Mailing address, if different: [YOUR MAILING ADDRESS, OR "SAME"]

Phone: [YOUR PHONE NUMBER] Email: [YOUR EMAIL ADDRESS]

Your status. Mark one.

- ☐ Owner of record
- ☐ Authorized representative of an owner of record. Complete the authorization below.
- ☐ Tenant or renter. Your access is narrower than an owner's. In a condominium or a cooperative it reaches the declaration, the bylaws, the rules, and the named inspection reports. A homeowners' association gives a tenant no inspection right, so that request has to come through the owner.
- ☐ Other: [DESCRIBE YOUR STATUS AND THE BASIS FOR IT]

RECORDS YOU ARE REQUESTING List each record on its own line.

#	Record	Dates or period covered
1	[RECORD]	[DATES OR PERIOD]
2	[RECORD]	[DATES OR PERIOD]
3	[RECORD]	[DATES OR PERIOD]
4	[RECORD]	[DATES OR PERIOD]
5	[RECORD]	[DATES OR PERIOD]
6	[RECORD]	[DATES OR PERIOD]

If you are not sure what a record is called, describe what you are looking for and the date it was created or discussed.

IF YOU ARE NOT SURE WHAT A RECORD IS CALLED Mark any category that covers what you want. Marking a category does not replace the list above. It helps the association find what you named.

Governing and organizational

- ☐ Recorded declaration and every amendment
- ☐ Bylaws and every amendment
- ☐ Articles of incorporation and every amendment
- ☐ Current rules and regulations
- ☐ Developer-provided plans, permits, and warranties
- ☐ Disclosure summary, homeowners' association

Meetings and voting

- ☐ Minutes of board meetings for [PERIOD]
- ☐ Minutes of member meetings for [PERIOD]
- ☐ Minutes of committee meetings for [PERIOD]

- ☐ Video recording of a meeting held by video conference on [MEETING DATE], condominium
- ☐ Ballots, sign-in sheets, and proxies from the [ELECTION OR VOTE DATE] election or vote

Financial

- ☐ Itemized receipts and expenditures for [PERIOD]
- ☐ Bank statements and general ledger for [PERIOD], condominium
- ☐ Invoices, transaction receipts, or deposit slips substantiating [DESCRIBE THE CHARGE]
- ☐ Account ledger and periodic statement for my unit, lot, or parcel
- ☐ Annual budget for [BUDGET YEAR], and any proposed budget
- ☐ Audit, review, compilation, or annual financial report for [FINANCIAL REPORT YEAR]
- ☐ Tax returns and financial statements for [TAX YEAR], homeowners' association

Contracts, bids, and insurance

- ☐ Management agreement in effect
- ☐ Contract with [VENDOR NAME], including any amendment
- ☐ Bids received for [PROJECT NAME]
- ☐ Current insurance policies

Building and structural

- ☐ Milestone or structural inspection reports, condominium and cooperative
- ☐ Structural integrity reserve study, condominium and cooperative
- ☐ Building permits, condominium

A homeowners' association is not required to keep any of these three under that name. Ask for the document by name in the list above rather than relying on a category mark.

Other

- ☐ Roster of owners and mailing addresses, without the personal information the law closes
- ☐ Current question and answer sheet, condominium and cooperative
- ☐ Director educational certificates, condominium
- ☐ Other written records related to the operation of the association: [DESCRIBE THE RECORD]

HOW YOU WANT TO RECEIVE THE RECORDS Mark all that apply.

- ☐ Inspect in person
- ☐ Inspect in person and photograph the records with my own device
- ☐ Paper copies. I agree to pay the association's lawful copy charges.
- ☐ Electronic copies sent to [DELIVERY EMAIL ADDRESS]
- ☐ View in electronic format on a screen and print on request
- ☐ A link, if the records are already posted on the association website or app

Dates and times that work for you: [DATES AND TIMES YOU ARE AVAILABLE]

AUTHORIZATION OF REPRESENTATIVE Complete only if someone other than the owner will inspect or receive the records.

I, [OWNER NAME], owner of [UNIT, LOT, OR PARCEL], authorize [REPRESENTATIVE NAME] to inspect and to obtain copies of the records listed above on my behalf.

Representative phone: [REPRESENTATIVE PHONE NUMBER] Representative email: [REPRESENTATIVE EMAIL ADDRESS]

Relationship to the owner: [RELATIONSHIP TO THE OWNER]

Owner signature: _____ Date: _____

REQUESTER SIGNATURE

I am the person named above. I am requesting inspection of the official records of [ASSOCIATION NAME]. I understand the association may adopt reasonable written rules about the frequency, time, location, notice, and manner of inspection, and that it may not require me to state a purpose or a reason.

Print name: [YOUR PRINTED NAME]

Signature: _____ Date: _____

PART 2. FOR ASSOCIATION USE ONLY

The association completes this half, returns a copy to the requester with the records, and keeps the completed form with the association's official records for at least 7 years.

REQUEST RECEIVED

Date received: [DATE RECEIVED] Time received, if hand delivered: [TIME RECEIVED, OR "NOT HAND DELIVERED"]

Received by: [NAME AND TITLE OF THE PERSON WHO RECEIVED IT]

How it was received: [CERTIFIED MAIL, HAND DELIVERY, EMAIL, OR OTHER]

Certified mail tracking number: [TRACKING NUMBER AS RECEIVED, OR "NONE"]

Request complete as received: [] Yes [] No. What is missing: [DESCRIBE WHAT IS MISSING, OR "NOTHING"]

DEADLINE WORKSHEET Fill this in the day the request arrives, not the day you answer it.

Type of association: [] Condominium [] Cooperative [] Homeowners' association

Day count used: [] Working days, condominium and cooperative [] Business days, homeowners' association

Date of receipt, day zero: [DAY ZERO DATE]

Weekend and holiday dates not counted: [DATES NOT COUNTED, OR "NONE"]

Response due on or before: [RESPONSE DUE DATE]

Date the association responded: [DATE RESPONDED]

First day minimum damages could accrue, the eleventh working or business day after receipt: [FIRST EXPOSURE DATE]

The response window is counted in working or business days. The \$50 minimum damages then run per calendar day, for up to 10 days. A response that is three business days late can be more than three days of exposure, so write both dates.

WHAT WAS DONE WITH EACH RECORD One line for every record listed above. In Comments, note whether material was removed, whether the record was withheld, whether the association does not hold it, or where it is posted online.

#	Record requested	Provided? Yes / No	Comments
1	[RECORD]	[YES OR NO]	[COMMENT]
2	[RECORD]	[YES OR NO]	[COMMENT]
3	[RECORD]	[YES OR NO]	[COMMENT]
4	[RECORD]	[YES OR NO]	[COMMENT]
5	[RECORD]	[YES OR NO]	[COMMENT]
6	[RECORD]	[YES OR NO]	[COMMENT]

RECORDS WITHHELD OR PARTLY REMOVED One line for every record that was withheld or produced with material removed. Naming the record without the reason, or the reason without the record, tells the requester nothing.

#	Record or portion	Reason it may not be released	Decided by
1	[RECORD OR PORTION]	[REASON IT MAY NOT BE RELEASED]	[NAME AND TITLE]
2	[RECORD OR PORTION]	[REASON IT MAY NOT BE RELEASED]	[NAME AND TITLE]
3	[RECORD OR PORTION]	[REASON IT MAY NOT BE RELEASED]	[NAME AND TITLE]

RECORDS THE ASSOCIATION DOES NOT HOLD

#	Record requested	Why it is not held
1	[RECORD]	[NEVER CREATED, RETENTION PERIOD EXPIRED, OR LOST OR DESTROYED]
2	[RECORD]	[NEVER CREATED, RETENTION PERIOD EXPIRED, OR LOST OR DESTROYED]

If a record was lost or destroyed, describe what the association did to recover it: [WHAT THE ASSOCIATION DID TO RECOVER IT, OR "NOT APPLICABLE"]

INSPECTION APPOINTMENT

Date offered: [APPOINTMENT DATE] Time: [APPOINTMENT TIME]

Location: [INSPECTION LOCATION ADDRESS]

Association representative attending: [ASSOCIATION REPRESENTATIVE NAME AND TITLE]

Copier available at that location: ☐ Yes ☐ No

Requester may photograph records at no charge: ☐ Confirmed

Written inspection rule given to requester: ☐ Yes, adopted [RULE ADOPTION DATE] ☐ The association has no adopted rule

CHARGES

Rate per page: \$[RATE PER PAGE] Pages copied: [PAGES COPIED]

Estimated cost, given to the requester before copying begins: \$[ESTIMATED COST]

Requester initials accepting the estimate: _____

Staff time billed: [STAFF HOURS BILLED] at \$[STAFF HOURLY RATE] per hour

Outside copying service: ☐ Yes, invoice attached ☐ No

Outside copying cost: \$[OUTSIDE COPYING COST]

Charge for the requester's own device: \$0.00

Total charged: \$[TOTAL CHARGED] Date paid: [DATE PAID]

ASSOCIATION SIGNATURE

The association received the request above on the date recorded under REQUEST RECEIVED. This response identifies the records made available and the records that were not made available, and states the reason for each record withheld or partly removed.

Print name and title: [RESPONDING PERSON NAME AND TITLE]

Signature: _____ Date: _____

Optional additions

The document above is complete as it stands. Use nothing on this page unless the situation described applies to your association.

Records Florida law closes to inspection

Do not add this list to the form. Keep it beside you while you complete Part 2, and use it to fill in the "Reason it may not be released" column. Give the requester a copy if they ask why a record was withheld.

- Records protected by the lawyer-client privilege, and attorney work product prepared for or in anticipation of litigation, until the proceeding ends
- Information obtained in connection with the approval of a lease, sale, or other transfer
- Personnel records of association or management company employees, other than employment agreements and records showing what an employee is paid
- Medical records of owners
- Social security numbers, driver license numbers, credit card numbers, and other personal identifying information
- Electronic security measures, including passwords
- The software and operating system used to hold association data
- Information obtained in a gated community in connection with guests' visits, homeowners' associations

Contact information is not a flat closure. An owner may consent in writing to its release, the association may publish a directory of names, addresses, and telephone numbers unless an owner opts out in writing, and in a condominium or a cooperative an address, email address, or facsimile number the owner gave the association for notice purposes sits outside the closure.

If a record contains both open and closed material, the association removes the closed material and produces the rest.

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