|  |  |  |
| --- | --- | --- |
| Date: | Loan No.: | |
| Project Name (Exact): | | |
| Project Address: (including county) | | |
| Borrower(s) Name: | | Phase# (if applicable): |

**Homebridge is processing a mortgage loan on the subject property listed above. The following information is required to complete the process. Your timely response is appreciated.**

**PROJECT PROFILE** *(TO BE COMPLETED BY HOA, MANAGING AGENT)*

**Name of Association or Management Company: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | **Yes** | **No** |  | | |  |
| 1. |  |  | Are all common elements and amenities completed, including those that are part of any master association? | | | |
| 2. |  |  | Is the project complete and not subject to additional phasing? | | | |
| 3. |  |  | Have at least 75% of the total units in the project been conveyed to unit purchasers? | | | |
| 4. |  |  | Does the project include any manufactured homes? | | | |
| 5. |  |  | Are multi-dwelling units allowed (owner owns more than 1-unit secured by a single deed and single mortgage)? | | | |
| 6. |  |  | Does the project provide for hotel type services?  (e.g. on-site registration desk, room service, HOA provided maid service, etc.) | | | |
| 7. |  |  | Does the project have a legal name that contains “resort”, “hotel”, or “motel”? | | | |
| 8. |  |  | Does the project provide for mandatory rental pools? (i.e. agreements that require the unit owners to rent their unit or give management firm control over the occupancy of the unit). | | | |
| 9. |  |  | Is the project/association part of any type of pending or current litigation or pre-litigation (e.g. arbitration or mediation)? If yes, please details as separate attachment. | | | |
| 10. |  |  | Is the project a timeshare? | | | |
| 11. |  |  | Is the project an investment security? | | | |
| 12. |  |  | Projects consisting of 21 or more units: Does any individual own more than 25% of the total units? If yes, # of units: \_\_\_\_\_\_\_ / \_\_\_\_\_\_\_% | | | |
| 13. |  |  | Projects consisting of 5-20 units: Does any individual or entity own more than 2 units? If yes, # of units: \_\_\_\_\_\_\_\_ | | | |
| 14. |  |  | Is more than 35% of the total square footage of the project used for non-residential purposes (i.e. commercial space)? | | | |
| 15. |  |  | Is the project subject to zoning restrictions that would prohibit the project from being re-built to current density? | | | |
| 16. |  |  | Does the project have shared amenities? If yes, please explain (attach separate page if necessary): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | |
| 17. |  |  | Is the project a continuing care facility? | | | |
| 18. |  |  | Is the project a conversion? If yes, provide conversion date: \_\_\_\_\_\_/ \_\_\_\_\_\_  Month Year | | | |
| 19. |  |  | If yes, to #17 was it a “gut” rehab? | | | |
| 20. | Total number of units in project: \_\_\_\_\_\_\_\_\_ | | | | | |
|  |  | | |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Yes** | | **No** | |  |
| 21. | |  | |  | Are the unit owners in control of the HOA? If yes, as of : \_\_\_\_\_\_/ \_\_\_\_\_\_  Month Year |
| 22. | |  | |  | Does the project consist of property that is not real estate (e.g. houseboat, boat slip, etc.)? |
| What are the monthly HOA dues for the subject unit? $\_\_\_\_\_\_\_\_\_ | | | | | |

**CONTACT AND SIGNATURE** *(TO BE COMPLETED BY HOA, MANAGING AGENT)*

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Contact Name/Title: | | |  | | | | | |
| Company Name: | |  | | | | | | |
| Phone Number: |  | | |  | Fax Number: | |  |  |
| By signing below, I certify that the information represented on this form is true and correct to the best of my knowledge. | | | | | | | | |
|  | | | | | |  | | |
| Signature | | | | | | | | |

**PROJECT CLASSIFICATION: To be completed by Homebridge Underwriter:**

|  |  |  |  |
| --- | --- | --- | --- |
| The project meets the classification requirements for a Freddie Mac Streamlined Review. | | | |
|  |  |  |  |

Homebridge Underwriter Signature Date