

Brookstone Alberta Condo Document Review – Checklist

Thank you for choosing Brookstone for your Condo Document Review. To ensure a thorough and timely review, please provide the following information and supporting documents. If you have questions, contact us at 587-333-5530 or info@brookstoneinspection.com.

Required Documents Checklist

Please attach the following documents (PDF preferred, scans accepted):

A. Administrative & Ownership

- ☐ Information Statement (unit-specific, current)
- ☐ Real Property Report (Bare Land condos only)
- ☐ Title(s) for Unit, Parking, and Storage (if applicable)
- ☐ MLS Sheet (if available)

B. Condominium Plan & Governance

- ☐ Registered Condominium Plan (Survey)
- ☐ Condominium Additional Plan Sheet Certificate (CADS)
- ☐ Current Registered Bylaws (showing Alberta Land Titles registration)
- ☐ House Rules / Policy Documents (Owner's Handbook, Move-in/out, Guest Suite, etc.)
- ☐ Rules & Policies (if separate from bylaws)

☐ Upcoming Bylaw Amendments or Votes (if known)

C. Financials

☐ Current Operating Budget (for the current year)

☐ Audited Financial Statements (last 2–3 years, if available)

☐ Year-End Financial Statements (required)

☐ Balance Sheet (current within the quarter of offer)

☐ Accounts Receivable Summary (unpaid fees, arrears, delinquent owners)

☐ Schedule of Capital Expenditures (last 5 years)

☐ Condo Fee History (recent increases or stability)

☐ Reserve Amount Invested & Annual Contribution

D. Reserve Fund

☐ Reserve Fund Study (RFS) (must be <5 years old, or note if new/in progress)

☐ Reserve Fund Plan (funding strategy, adoption date, distribution to owners)

☐ Annual Reserve Fund Report (latest available)

☐ Engineering Reports or Technical Audits (if available)

☐ Post-Tension Cable Report (if required by RFS/information statement)

E. Insurance

☐ Insurance Certificate (confirm not expired)

☐ Standard Insurable Unit Description (SIUD)

☐ Insurance Claims History (recent claims and outcomes, if available)

F. Meetings & Management

☐ Board of Director Monthly Meeting Minutes (last 12 months)

☐ Annual General Meeting (AGM) Minutes (last AGM must be within 15 months)

☐ Management Agreement or Contact (for self-managed boards)

☐ Board/Management Contact Information

G. Legal & Compliance

☐ Disclosure of Legal Actions or Claims (>\$5,000, slip & fall, ongoing litigation)

☐ Court Judgments or Liens (Land Titles review)

☐ Confirmation of No Pending Litigation or Judgments (often in estoppel)

☐ Pending Human Rights or Accessibility Complaints

☐ Compliance with Alberta Condominium Property Act & Building Code

☐ Pending/Past Code Violations or Enforcement Actions

H. Special Assessments & Estoppel

☐ Disclosure of Special Assessments (pending, approved, or proposed)

☐ Special Assessment Calculation Method for Unit Share

☐ Frequency and History of Special Assessments

☐ Estoppel Certificate (fees amount and status, upcoming levies, ownership/contact info, confirmation of no litigation/judgments)

I. Maintenance & Capital Planning

☐ Recent Engineering/Building Condition Reports (if available)

☐ Major Deficiencies Identified (structure, envelope, mechanical)

☐ Status of Ongoing/Upcoming Construction Projects

☐ Deferred or Recurring Major Repairs

Submission Instructions

- Combine all documents into a single email or shared folder link if possible.
- Send to: info@brookstoneinspection.com
- You will receive confirmation of receipt and your review timeline within 1 business day.

Thank you for your cooperation. The completeness of your submission ensures a thorough and timely review. If you have any questions about these requirements, please contact us at 587-333-5530 or info@brookstoneinspection.com