

File #	Condo Name:	Client:	
Required	Document Name:	Notes:	Note with X for Received
	Purchase Agreement		
	Title to residential and any titled parking & storage units		
	MLS – feature sheet	In a pdf format	
	Bylaws – Showing Registration #	Reg. # is to match the most recent Change of Bylaws shown on the CAD	
	Operating budget	For the year 2022	
	Condo Fee Schedule	For the 2022 year	
	Monthly Financial Statement (only the most recent - 1 month required)	A month within the past 90 days <i>Balance Sheet, Profit & Loss, and Budget Comparison</i>	
	Year-end Financial Statement	prepared by an accountant	
	Notice of Special Assessments	That the seller has received	
	Board meeting minutes	for past 12 months	
	Most recent AGM meeting minutes	Draft is acceptable	
	Certificate of Insurance	Expiring in 2022	
	SIUD - Standard Insurable Unit Description	If available	
	Reserve Fund Study and Plan	the full study and financial tables are required	
	Engineers or technical reports	Note: lenders are asking for these	
	Condominium sheet from Spin (CAD)	Dated for the current month <i>This document looks like a title</i>	
	Condominium Plan	This is titled the Condominium Plan sheet at CREB (<i>this is the map of the project</i>)	
	Management Agreement		
	Manager's Disclosure or Information Statement	This document has many titles – it is the one that is \$150 for a rush of 3 days	
	Loan Detail	If noted in the disclosure document, be sure to request details	
	Newsletters, Rules, Policies	In addition to the bylaws	
	Recreation Agreement	This is typically a golf club or Association that offers amenities not located in the project lands	
	Lease of Parking or Storage Agreement		

Some document names may vary as management companies get creative in naming documents. We hope this list will assist you with this challenge.