

***ANNUAL BUDGET REPORT – 30 to 90 Days Before End of Fiscal Year**

The Pro Forma Budget or Summary of the Pro Forma Budget	\$5300(b)(1)
Summary of Association Reserves	\$5300(b)(2); \$5565
Summary of the Reserve Funding Plan	\$5300(b)(3); \$5550 (b)(5)
Statement of Any Board Decision to Defer or Not Undertake Certain Component Repairs	\$5300(b)(4)
Statement of Any Anticipated Special Assessments	\$5300(b)(5)
Statement of Method(s) of Reserve Funding	\$5300(b)(6)
Statement Outlining Procedure Used to Calculate Reserves	\$5300(b)(7); \$5570(b)(4)
Association Loan Disclosure	\$5300(b)(8)
Summary of Specified Insurance Coverages	\$5300(b)(9)
Assessment and Reserve Fund Disclosure Summary – Form	\$5300(e); \$5570

***ANNUAL POLICY STATEMENT – 30 to 90 Days Before End of Fiscal Year**

Name and Address of Person Designated to Receive Official Communications to the Association	\$5310(a)(1); \$4035
Notice of Right to Submit Secondary Address for Annual Disclosures and Collection Notices	\$5130(a)(2); \$4040(b)
Notice of Location, if any, Designated for Posting General Notices	\$5310(a)(3); \$4045
Notice of Right to Receive General Notices by Individual Delivery Upon Request	\$5310(a)(4); \$4045(b)
Notice of Right to Receive Minutes of Board Meetings	\$5310(a)(5); \$4950(b)
Notice of Collection Rights & Duties – Form	\$5310(a)(6); \$5730
Assessment Collection Policy	\$5310(a)(7)
Discipline Policy, If Any, Including Schedule of Fines (“Fine Policy”)	\$5310(a)(8); \$5850
Dispute Resolution Summary (“Meet and Confer” and Alternative Dispute Resolution)	\$5310(a)(9); \$5920; \$5965
Architectural Guidelines and Procedures	\$5310(a)(10); \$4765(c)
Mailing Address for Overnight Payment of Assessments	\$5310(a)(11); \$5655(c)

***NOTE:** These disclosures may alternatively be made in summary, generally describing their contents. Such a summary, if provided in lieu of complete reports, must include a notice, in 10-point boldface type on the first page, advising members how to request complete report(s) at no cost.

ADDITIONAL FINANCIAL DISCLOSURES

Use of Reserve Funds	By General Notice After Decision	\$5520
Intent to Borrow From Reserves	In General Notice of Board Meeting	\$5515(a)
Intent to Postpone Repayment of Borrowed Reserves	Within 1 Year of Decision to Borrow, in General Notice of Board Meeting	\$5515(d)
Review of Financial Statement	Within 120 Days After Close of Fiscal Year	\$5305
Notice of Special Assessment or Increase in Regular Assessments	Not less than 30 Days and Not More Than 60 Days Before Due	\$5615

DOCUMENTS TO SELLERS AND MEMBERS / OTHER

Disclosures to Sellers (Documents/Pricing Form)	Within 10 Days of Receiving Written Request	\$4525; \$4530
Statement of Non-Incorporation	If Applicable, With Disclosure to Sellers	\$4525(a)(1)
Notice of Age Restrictions	If Applicable, With Disclosure to Sellers	\$4525(a)(2)
Notice of Rental Restrictions	If Applicable, With Disclosure to Sellers	\$4525(a)(9)
Statement Regarding Discriminatory Covenants - Form	When Providing Any Governing Document	Gov't Code §12956.1

ARCHITECTURAL CONTROLS / RULE-MAKING

Architectural Guidelines and Procedures	In Annual Policy Statement	\$4765(c); \$5310(a)(10)
Notice of Right to Reconsideration of Denied Application, If Decision Not Made By Board	With Written Denial	\$4765(a)(5)
Notice of Intent to Make Certain Rules Changes	By General Notice, At Least 30 Days Prior to Board Adoption; Emergency Rules Excepted	\$4360(a)&(d)
Notice of Adoption of Certain Rule Changes	Provided by General Notice, Not More Than 15 Days After Adoption	\$4360(c)

MEETINGS		
Notice and Agenda of Open Board Meetings	By General Notice, At Least 4 Days Prior to Board Meeting	\$4920(a); \$4930
Notice of Emergency Board Meeting	No Notice Required	\$4920(b)(1)
Notice and Agenda of Executive Session Meeting	By General Notice, At Least 2 Days Prior to Board Meeting	\$4920(b)(2); \$4930
Notice of Right to Receive Minutes of Board Meetings	In Annual Policy Statement	\$4950; \$5310(a)(5)
Notice of Intent to Make Certain Rules Changes	By General Notice, At Least 30 Days Prior to Board Adoption	\$4360(a)
Notice to Member of Board Meeting to Consider Imposing Discipline	By Individual Delivery, At Least 10 Days Prior to Board Meeting	\$5855(a)
MEMBER DISCIPLINE / DISPUTE RESOLUTION		
Enforcement Policy, If Any, Including Schedule of Monetary Penalties ("Fine Policy")	In Annual Policy Statement	\$5850
Notice to Member of Board Meeting to Consider Imposing Discipline	By Individual Delivery, At Least 10 Days Prior to Board Meeting	\$5855(a)
Notice to Member of Discipline Imposed	By Individual Delivery, Not More Than 15 Days After Decision	\$5855(c)
Alternative Dispute Resolution Rights Summary	In Annual Policy Statement	\$5310(a)(9); \$5965
Internal Dispute Resolution ("Meet-and-Confer") Program Summary	In Annual Policy Statement	\$5310(a)(9); \$5920
LIENS / COLLECTIONS		
Notice of Right to Submit Secondary Address For Collection Notices	In Annual Policy Statement	\$5130(a)(2)
Pre-Lien Notice	At Least 30 Days Before Recording Lien	\$5660
Assessment Collection Policy	In Annual Policy Statement / With Pre-Lien Notice	\$5310(a)(7); \$5660(a)
Notice of Right to Inspect Financial Records	With Pre-Lien Notice	\$5660(a)
Notice of Right to Meet with Board to Discuss Delinquent Assessment Payment Plan	With Pre-Lien Notice	\$5660(d)
Notice of Right to Dispute Assessment Debt by "Meet and Confer"	With Pre-Lien Notice	\$5660(e)
Notice of Right to Request Post-Lien ADR	With Pre-Lien Notice	\$5660(f)
INSURANCE		
Summary of Specified Insurance Coverages	In Annual Budget Report	\$5300(b)(9)
CONSTRUCTION DEFECTS		
Notice of Construction Defect Litigation	30 Days Before Suit is Filed	\$6150
Notice of Construction Defect Resolution / Repair Plan and Timeline	As Soon as Reasonably Practicable After Resolution	\$6100
Receipt / Expenditure of Construction Defect Award / Settlement Monies	In Annual Budget Report or Year-End Review of Financial Statement	\$5565(b)(3)
CORPORATE DISCLOSURES		
Statement of Officers' Names, Addresses / Agent for Service of Process	File Every Other Year, Up to Five Months Prior to Anniversary Date of Initial Filing	Corp. Code §8210
Registry / Statement of CID Association	File with Secretary of State Every Other Year, with Statement of Officers' Names, etc. / Within 60 Days of Change in On-Site or Management Address	\$5405