

**PASEO MASTER HOMEOWNERS ASSOCIATION, INC.**

**A RESOLUTION OF THE BOARD OF DIRECTORS ESTABLISHING RULES  
GOVERNING REQUESTS FOR INSPECTION AND COPYING OF OFFICIAL  
RECORDS**

**DRAFT**

**THAT WHEREAS**, Chapter 720, Florida Statutes grants a member of the Association right to inspect and copy the Official Records of the Association; and

**WHEREAS**, Chapter 720 and the governing documents of the Association authorizes the Board to adopt and enforce reasonable rules and restrictions regarding the frequency, time, location, notice, and manner of inspections; and

**WHEREAS**, the Board deems it in the best interest of the Association to adopt such reasonable rules in order to preserve the limited resources of the Association which are impacted by unfettered requests for Official Records.

**NOW THEREFORE BE IT RESOLVED** by the Board of Directors of Paseo Master Homeowners Association, Inc., that the rules governing the rights of members to request, inspect and copy Official Records shall be as follows:

1. The Official Records shall be those records listed on the attached Exhibit "A".
2. A member shall only be allowed to make one (1) request per month to inspect and copy the Official Records.
3. All records requests must be made in writing on the attached official forms numbered 1 through 6.
4. No request is valid until the form(s) is/are completed in full and delivered to the Association office.
5. The same records may not be requested more than one (1) time within the previous twelve (12) calendar months.
6. A new form must be completed for each new records request.
7. A member may not spend more than 4 hours per day in the office inspecting and copying records.
8. The member shall only be entitled to the Official Record in the format that is regularly kept by the Association.
9. The Association may impose fees to cover the costs of providing copies of the Official Records, including, without limitation, the costs of copying.
10. The Board may impose additional restrictions and adopt additional procedures from time to time.

ADOPTED by the Board of Directors this \_\_\_\_ day of August, 2018.

BY: \_\_\_\_\_

Secretary of the Association

## LIST OF OFFICIAL RECORDS

## EXHIBIT A

- (a) Copies of any plans, specifications, permits, and warranties related to improvements constructed on the common areas or other property that the association is obligated to maintain, repair, or replace.
- (b) A copy of the bylaws of the association and of each amendment to the bylaws.
- (c) A copy of the articles of incorporation of the association and of each amendment thereto.
- (d) A copy of the declaration of covenants and a copy of each amendment thereto.
- (e) A copy of the current rules of the homeowners' association.
- (f) The minutes of all meetings of the board of directors and of the members, which minutes must be retained for at least 7 years.
- (g) A current roster of all members and their mailing addresses and parcel identifications. The association shall also maintain the electronic mailing addresses and the numbers designated by members for receiving notice sent by electronic transmission of those members consenting to receive notice by electronic transmission. The electronic mailing addresses and numbers provided by unit owners to receive notice by electronic transmission shall be removed from association records when consent to receive notice by electronic transmission is revoked. However, the association is not liable for an erroneous disclosure of the electronic mail address or the number for receiving electronic transmission of notices.
- (h) All of the association's insurance policies or a copy thereof, which policies must be retained for at least 7 years.
- (i) A current copy of all contracts to which the association is a party, including, without limitation, any management agreement, lease, or other contract under which the association has any obligation or responsibility. Bids received by the association for work to be performed must also be considered official records and must be kept for a period of 1 year.
- (j) The financial and accounting records of the association, kept according to good accounting practices. All financial and accounting records must be maintained for a period of at least 7 years. The financial and accounting records must include:
  - 1. Accurate, itemized, and detailed records of all receipts and expenditures.
  - 2. A current account and a periodic statement of the account for each member, designating the name and current address of each member who is obligated to pay assessments, the due date and amount of each assessment or other charge against the member, the date and amount of each payment on the account, and the balance due.
  - 3. All tax returns, financial statements, and financial reports of the association.
  - 4. Any other records that identify, measure, record, or communicate financial information.

(k) A copy of the disclosure summary described in 720.401(1).

(l) All other written records of the Association not specifically included in the foregoing which are related to the operation of the Association.

**PASEO MASTER HOMEOWNERS ASSOCIATION, INC.**

**OFFICIAL RECORDS REQUEST OWNER'S AUTHORIZED  
REPRESENTATIVE FORM**

The undersigned owner and member of Paseo Master Homeowners Association, Inc., hereby designates the following named person to act as my authorized representative to inspect and copy the official records of the Association:

1. Date of Written Request to Inspect Records: \_\_\_\_\_.
2. Records Inspection Scheduled For: \_\_\_\_\_.
3. Name of Authorized Representative: \_\_\_\_\_.
4. Telephone number of Authorized Representative: \_\_\_\_\_.
5. Address of Authorized Representative: \_\_\_\_\_.

Owner/Member:

Name: \_\_\_\_\_.

Signature: \_\_\_\_\_.

Date: \_\_\_\_\_.

Only one (1) representative may be named at a time. The authorization is only valid for the Records Request listed in item 1 above. A new form must be completed for each new records request. No authorization is valid unless and until this form is completed in full. This form must be submitted at least forty-eight (48) hours in advance of the scheduled inspection.

**PASEO MASTER HOMEOWNERS ASSOCIATION, INC.**

**OFFICIAL RECORDS INSPECTION REQUEST FORM**

I, the undersigned owner and member of Paseo Master Homeowners Association, Inc., request to inspect the following listed Official Records of the Association:

Official Record

Date of Official Record

1. \_\_\_\_\_

\_\_\_\_\_

2. \_\_\_\_\_

\_\_\_\_\_

3. \_\_\_\_\_

\_\_\_\_\_

4. \_\_\_\_\_

\_\_\_\_\_

5. \_\_\_\_\_

\_\_\_\_\_

6. \_\_\_\_\_

\_\_\_\_\_

7. \_\_\_\_\_

\_\_\_\_\_

8. \_\_\_\_\_

9. \_\_\_\_\_

10. \_\_\_\_\_

Date of this Request: \_\_\_\_\_. Date of My Last Request: \_\_\_\_\_.

Name of Owner/Member Making Request: \_\_\_\_\_.

Signature of Owner/Member Making Request: \_\_\_\_\_.

Mailing Address of Owner/Member: \_\_\_\_\_.

Only one (1) request may be made per calendar month. The same records may not be requested more than one (1) time within the previous twelve (12) calendar months. No request is valid unless made in writing using this Form. No request is valid until this form is completed in full. A new Form must be completed for each new records request. All requests must be mailed via United States Mail or hand delivered to: Paseo Master Homeowners Association, Inc. 11611 Paseo Grande Blvd., Ft. Myers, FL 33912.

**PASEO MASTER HOMEOWNERS ASSOCIATION, INC.**

**OFFICIAL RECORDS COPYING REQUEST FORM**

I, the undersigned owner and member of Paseo Master Homeowners Association, Inc., request the following listed official records of the Association be copied:

Official Record	Date of Official Record
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____
5. _____	_____
6. _____	_____
7. _____	_____
8. _____	_____

9. \_\_\_\_\_

10. \_\_\_\_\_

Date of this Request: \_\_\_\_\_.

Name of Owner/Member: \_\_\_\_\_.

Signature of Owner/Member: \_\_\_\_\_.

Owner/Member Mailing Address and Telephone Number: \_\_\_\_\_  
\_\_\_\_\_

Cost of Copies is \$0.25 per page. Payment due upon delivery of official records.



**PASEO MASTER HOMEOWNERS ASSOCIATION, INC.**

**OFFICIAL RECORDS REQUEST INTAKE LOG**

Date of Request/ Date Received	Owner/Member Making Request	Response to Request Sent/ Sender's Initials
1._____/_____	_____	_____
2._____/_____	_____	_____
3._____/_____	_____	_____
4._____/_____	_____	_____
5._____/_____	_____	_____
6._____/_____	_____	_____
7._____/_____	_____	_____
8._____/_____	_____	_____

9. \_\_\_\_\_/\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

10. \_\_\_\_\_/\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

11. \_\_\_\_\_/\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

12. \_\_\_\_\_/\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

13. \_\_\_\_\_/\_\_\_\_\_

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\_\_\_\_\_

14. \_\_\_\_\_/\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

15. \_\_\_\_\_/\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**PASEO MASTER HOMEOWNERS ASSOCIATION, INC.**

**OFFICIAL RECORDS INSPECTION REQUEST RESPONSE FORM**

Date: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Dear \_\_\_\_\_:

We are in receipt of your request to inspect the Official Records of the Association dated \_\_\_\_\_ but actually received on \_\_\_\_\_. Thank you. In response to your request please see the blank checked below:

\_\_\_\_\_ The Official Records you have requested are available for your inspection at the offices of Paseo Master Homeowners Association, Inc., located at 11611 Paseo Grande Blvd., Fort Myers, Florida 33912. Please call the Paseo Master HOA office at (239) 834-6300 to schedule a convenient time to inspect the records. If you wish to make copies of the records you inspect you must pay \$0.25 per page. Payment is due upon delivery of the records.

\_\_\_\_\_ Pursuant to the Records Request Policy of the Association your request has been denied for the following reason/s:

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Very truly:

Paseo Master Homeowners Association, Inc.

**PASEO MASTER HOMEOWNERS ASSOCIATION, INC.**

**OFFICIAL RECORDS INSPECTION SCHEDULING TELEPHONE LOG**

Date of Request/ Date of Telephone Conversation	Owner/Member	Inspection Date
1._____/_____	_____	_____
2._____/_____	_____	_____
3._____/_____	_____	_____
4._____/_____	_____	_____
5._____/_____	_____	_____

6. \_\_\_\_\_/\_\_\_\_\_

7. \_\_\_\_\_/\_\_\_\_\_

8. \_\_\_\_\_/\_\_\_\_\_

9. \_\_\_\_\_/\_\_\_\_\_

10. \_\_\_\_\_/\_\_\_\_\_

11. \_\_\_\_\_/\_\_\_\_\_

12. \_\_\_\_\_/\_\_\_\_\_