

### 3.E. INSPECTION OF OFFICIAL RECORDS

#### 1. Request

1.1. Requests for inspection or copying of Official Records shall be in writing on a form provided by the Foundation and available at the Foundation office and Foundation website ([www.pelicanbay.org](http://www.pelicanbay.org)). Written requests shall specify the date and description, if known, of the document(s) requested.

1.2. The date and time that records may be inspected or copied shall be within (10) business days of the Member's request, and the Member shall be given a minimum of 48 hours' notice.

1.3. A Member (one membership per unit) may not submit more than one (1) request each calendar month.

2. **Inspecting Records:** The Official Records of the Foundation may be inspected at the Foundation office, or at such other place as may be designated by the Foundation, by Members or their authorized agents between the hours of 9:00 A.M. and 5:00 P.M. each weekday (excluding holidays) or as otherwise arranged and agreed in advance with the Foundation. Authorized agents must have written permission from the Member authorizing such agent to examine the records on behalf of the Member.

3. **Copying Records:** Copies may be obtained of the official records. The Foundation will make copies of the requested records in the Foundation office at the cost of \$.50 per page. Alternately, if the records requested exceed 25 pages, the Foundation may have copies made by an outside vendor and may charge the actual cost of copying, including any costs involving Employee's compensation and charges at an hourly rate for the vendor's and Employee's time to cover administrative costs paid to the vendor and for the Foundation.

4. **Official Records:** The Official Records of the Foundation are available at the Foundation office and Foundation website ([www.pelicanbay.org](http://www.pelicanbay.org).)

Amended and Approved: 28 April 2017

## OFFICIAL RECORDS

### **THE ASSOCIATION SHALL MAINTAIN EACH OF THE FOLLOWING ITEMS, WHEN APPLICABLE, WHICH CONSTITUTE THE OFFICIAL RECORDS OF THE ASSOCIATION:**

- (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 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 must be retained for at least 7 years.
- (g) A current roster of all members and their mailing addresses and parcel identifications.
- (h) All of the association's insurance policies or a copy thereof, which 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.

**OFFICIAL RECORD REQUEST FORM**

Name \_\_\_\_\_

Address \_\_\_\_\_

Association \_\_\_\_\_

Phone # \_\_\_\_\_

Foundation Member # \_\_\_\_\_

Authorized agent, if any \_\_\_\_\_

Address \_\_\_\_\_

Phone # \_\_\_\_\_

Specific official record and or records to be inspected \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Purpose for the  
request \_\_\_\_\_

\_\_\_\_\_

Requested date and time for the subject  
inspection \_\_\_\_\_

The foregoing request shall be addressed to:

The Pelican Bay Foundation  
6251 Pelican Bay Blvd.  
Naples, FL 34108  
Attn: Official records custodian