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Condominium Document Checklist

BUYER AND REALTOR PREPARATION GUIDE

> You or your real estate agent can obtain the necessary documents directly from the condominium management company. These documents may be requested at any time - before or after creating an account.

! **Check the dates on all documents and make sure they are current.**

- [ ] **Information Statement**
  Must be unit-specific and current.
- [ ] **Reserve Fund Study (RFS)**
  If the RFS is over five years old, ask whether a new study is available or currently in progress.
- [ ] **Annual General Meeting (AGM) Minutes**
  An AGM should be held within 15 months of the previous AGM.
- [ ] **Board of Directors Monthly Meeting Minutes**
  Request the past 12 months.
- [ ] **Current-Year Budget**
  A budget should be provided to owners within 30 days of the new budget year.
- [ ] **Balance Sheet**
  Should be current within the quarter of the year in which the offer is written.
- [ ] **Year-End Financial Statement**
  Audited if available. An audit may not be required, but year-end financial statements are required.
- [ ] **Insurance Certificate**
  Confirm that the certificate has not expired.
- [ ] **Management Agreement or Contact Information**
  For a professionally managed condominium, obtain the agreement. For a self-managed board, obtain the appropriate contact details.

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2 Additional Documents

- [ ] **Standard Insurable Unit Description (SIUD)**
- [ ] **Bylaws**
  Confirm that they show the Alberta Land Titles registration.
- [ ] **Registered Condominium Plan (Survey)**
  Indicates the condominium type, total number of units, and registration date.
- [ ] **Condominium Additional Plan Sheet Certificate (CADS)**
  Shows registrations connected to the corporation, including bylaws, SIUD, directors, property management, caveats, and related filings.
- [ ] **MLS Sheet**
- [ ] **Title(s)**
  For the unit, parking, and storage, where applicable.
- [ ] **Rules and Policies**
  In addition to the bylaws, request any available owner handbook, move-in and move-out procedures, garbage information, guest-suite policies, and similar documents.
- [ ] **Engineering Reports or Technical Audits**
  If available, include any report prepared by a qualified professional.
- [ ] **Post-Tension Cable Report**
  If referenced in the Information Statement or Reserve Fund Study, request and provide the report.

Client / Property Notes

This checklist is provided for general informational and document-gathering purposes. Requirements may vary by property, condominium corporation, transaction, and applicable law. It is not a substitute for legal, accounting, engineering, insurance, or real estate advice.