

CONDOMINIUM ASSOCIATION QUESTIONNAIRE

Name: _____ Date: _____
 Current Insurance Company _____ Ex-Date: _____
 Location Address: _____
 Mailing Address: _____
 Decision Maker: _____ Phone#: _____
 Property Manager: _____ Phone#: _____
 Attorney: _____ Phone#: _____
 Accountant: _____ Phone#: _____
 When was the association incorporated _____ FEIN _____
 Is there a master association other than this association? No Yes _____
 % of ownership by real estate developer? _____ Distant to nearest:
 Responding Fire Department _____ Fire Hall _____ Hydrant _____
 Are there any businesses on the premises? No Yes IF yes, what? _____
 Adjacent exposures: Commercial Area Residential Area
 Adjacent buildings: (type & condition) _____
 Are there vacant buildings? No Next to premises In the immediate area

LIABILITY INFORMATION

#Units	_____	Are the majority of the tenants:	If no give details:
% Vacant	_____	Over 21?	<input type="checkbox"/> Yes <input type="checkbox"/> No _____
% Rented	_____	Under 70?	<input type="checkbox"/> Yes <input type="checkbox"/> No _____
Time Share	<input type="checkbox"/> Yes <input type="checkbox"/> No	Ambulatory?	<input type="checkbox"/> Yes <input type="checkbox"/> No _____
Seasonal	<input type="checkbox"/> Yes <input type="checkbox"/> No	Non-Military?	<input type="checkbox"/> Yes <input type="checkbox"/> No _____
		Non-Student?	<input type="checkbox"/> Yes <input type="checkbox"/> No _____

If rental, who is responsible for rentals? _____

Y N NA Life Safety, Protection and Security

- Does the risk have a posted written formal evacuation plan?
Number of exits on each floor? _____
- Can windows be used as exits?
- Fire escapes? # _____ Condition Excellent Good Fair Poor
- Do exit doors have panic hardware?
- Are stairwells enclosed? Condition Excellent Good Fair Poor
- Are there handrails? Condition Excellent Good Fair Poor
- Are doors to stairwells self-closing?
- Does the risk have emergency lighting?
- Does the risk have illuminated exit signs?
- Are all vertical openings above the second floor enclosed per NFPA?
- Are there smoke dampers in HVAC systems that are common to more than on floor?
- If yes, are they activated by UL smoke detectors?

LIABILITY INFORMATION

Y N NA Life Safety, Protection and Security

- Are there smoke detectors? Where _____
Smoke detectors are: _____% Battery Powered _____% Hardwired
- If battery, is there a maintenance program? How often _____
- Are alarms central station? Who _____
- Are the buildings sprinklered? Fully Partially
- Does the risk have zoned smoke exhaust systems? Where _____
- Does the risk have hand fire extinguishers? Where _____
extinguishers _____ Type _____ Date last serviced _____
- Are the buildings equipped with standpipes? Where _____
- Are there fire alarm pullboxes on each floor?
- Have there been crimes in the area which require security?
If yes, what? _____
- Is the community gated?
- If yes, is this gate manned? What hours? _____
- If yes, are the guards employed by the association?
- If subcontracted do you require certificates?
- Are the guards unarmed?
- Is there an announcement panel with an electric door?

Y N NA Swimming Pools, Other Facilities, Maintenance, and General

- Are there any pools? #Outdoor _____ #Indoor _____ Hours _____
- Are they fenced with self-closing and self-latching gates?
- Are safety rules displayed?
- Are depths clearly marked? Deepest area of pool is _____ feet deep.
- Are life ring and shepherd's hook available and obvious?
- Is there a diving board? If yes, what is the height of diving board _____
- Is there a slide?
- Is the water tested at least weekly? If yes, by who _____
- Are pool chemicals stored properly?
- Are there any Jacuzzis, steam rooms, or saunas?
- Is there a laundry room provided for tenants' use?
- Is the operation of the laundry room the responsibility of the insured?
- If subcontracted do you require certificates?
- Are parking and sidewalk surfaces even and free of defects?
- Is there adequate lighting in all public areas?
- Who is responsible for building maintenance? _____
- Is work subcontracted by contract?
- Does insured obtain certificates of insurance from subcontractors for:
 General Liability Workers Compensation
- What limits are required from subcontractors? _____

NON-OWNED AUTO INFORMATION

Y N NA

- Do any employees use their automobile? If yes, how often? _____
- If yes, do you require employees to maintain adequate limits?
If yes, what limits are require? _____

UMBRELLA AND D&O INFORMATION

Y N # Directors _____

- Is your umbrella policy excess over your D&O policy?
- Is the insurance exclusion removed from your D&O policy?

FIDELITY BOND INFORMATION

- Y N** What is the annual budget of the association? \$ _____
Who can sign other than President/Secretary/Treasurer? _____
- Is coverage require on directors other that those listed above?
If yes, how many additional directors? _____
 - Is countersignature of all checks required?
 - Is the association's financial statement made at least annually?
Who prepares the statement What is the scope of the statement
 - Independent Public Accountant Audit
 - Certified Public Accountant Review
 - Internal Bookkeeper Compilation
 - Management Company
 - Is the report rendered directly to the board of directors?
How often are financial transactions reviewed by the board or a committee? _____
 - Purchases over \$ _____ require approval by the borad?
 - Are bank accounts reconciled by someone not authorized to deposit or withdraw funds?

WORKERS COMPENSATION INFORMATION

Category	# Employees		Annual Payroll
	FT	PT	
8810 Clerical	_____	_____	\$ _____
9015 Building Operations	_____	_____	\$ _____

PROPERTY INFORMATION

Habitational Buildings

	<u>Address</u>	<u># Units</u>	<u>Construction</u>	<u>Stories</u>	<u>Sq Ft</u>
1	_____	_____	_____	_____	_____
2	_____	_____	_____	_____	_____
3	_____	_____	_____	_____	_____
4	_____	_____	_____	_____	_____
5	_____	_____	_____	_____	_____
6	_____	_____	_____	_____	_____
7	_____	_____	_____	_____	_____
8	_____	_____	_____	_____	_____
9	_____	_____	_____	_____	_____
10	_____	_____	_____	_____	_____
11	_____	_____	_____	_____	_____
12	_____	_____	_____	_____	_____
13	_____	_____	_____	_____	_____
14	_____	_____	_____	_____	_____
15	_____	_____	_____	_____	_____
16	_____	_____	_____	_____	_____
17	_____	_____	_____	_____	_____
18	_____	_____	_____	_____	_____
19	_____	_____	_____	_____	_____
20	_____	_____	_____	_____	_____

Other Property

	<u>Value</u>	<u>Construction</u>	<u>Dimensions</u>
Clubhouse	\$ _____	_____	_____ sq ft
Swimming Pool	\$ _____	_____	lgth _____ ft wdth _____ ft
Pool Bathrooms	\$ _____	_____	_____ sq ft
Pool Fencing	\$ _____	_____	lgth _____ ft hgth _____ ft
Tennis Courts	\$ _____	_____	# _____
Tennis Fencing	\$ _____	_____	lgth _____ ft hgth _____ ft
Racquetball Courts	\$ _____	_____	_____ sq ft
Gazebos	\$ _____	_____	_____ sq ft
Storage Building	\$ _____	_____	_____ sq ft
Barrier Walls	\$ _____	_____	lgth _____ ft hgth _____ ft
Perimeter Fencing	\$ _____	_____	lgth _____ ft hgth _____ ft
Entrance Gates	\$ _____	_____	_____
Entrance Signs	\$ _____	_____	_____
Light Poles	\$ _____	_____	# _____
Road (owned)	\$ _____	_____	_____ miles
Other	\$ _____	_____	_____
Other	\$ _____	_____	_____
Other	\$ _____	_____	_____

PROPERTY INFORMATION

General Condition

Year Built _____

Year Converted _____

Buildings	<input type="checkbox"/> Excellent	<input type="checkbox"/> Good	<input type="checkbox"/> Fair	<input type="checkbox"/> Poor
Roofs	<input type="checkbox"/> Excellent	<input type="checkbox"/> Good	<input type="checkbox"/> Fair	<input type="checkbox"/> Poor
Stairs	<input type="checkbox"/> Excellent	<input type="checkbox"/> Good	<input type="checkbox"/> Fair	<input type="checkbox"/> Poor
Walkways	<input type="checkbox"/> Excellent	<input type="checkbox"/> Good	<input type="checkbox"/> Fair	<input type="checkbox"/> Poor
Parking Area	<input type="checkbox"/> Excellent	<input type="checkbox"/> Good	<input type="checkbox"/> Fair	<input type="checkbox"/> Poor
Other Facilities	<input type="checkbox"/> Excellent	<input type="checkbox"/> Good	<input type="checkbox"/> Fair	<input type="checkbox"/> Poor

CONDOMINIUM CHECKLIST

Will the insurance presentation be made in front of the board? Yes No

What is the deadline/timeframe for the presentation? _____

ITEMS NEEDED

Received

1. Condominium Association Questionnaire
2. Condominium Association documents/by-laws
3. Appraisal
4. Latest Financials
5. List of Directors' and Officers'
6. Hard copy loss runs
7. Existing Policies
8. Diagram/Brochure of Property