

## **Guidelines for Inspection of Homeowner Association's Records:**

1. It is the intent of Southwest Property Management to provide Homeowner Association record information to lot owners of that HOA in a manner consistent with State Guidelines and in a friendly and professional manner.
2. All written requests for an HOA inspection of records must come from a lot owner of that Homeowner's Association and all requests must be by **certified mail** and mailed to:  
Southwest Property Management  
**Official Document Request**  
PO Box 783367  
Winter Garden, FL 34778
3. While no reason for any request is necessary, all requests must be reasonable and **each** item that the lot owner requests to inspect must be **clearly stated** in the certified letter. The homeowner's phone number must be included in the request.
4. All requests for reasonable inspections will be provided within 10 business days.
5. A staff member will supervise the inspection, but will not be available for questioning. Records requests shall not exceed 1 day per month.
6. No item may leave the office and each item must be copied or scanned as is. Inspector may not remove staples and/or paperclips. No folding of pages in any way (etc.). The integrity of each page must stay intact and unchanged.
7. If copying is done in the SW Office or an office facility or any other location the first 25 pages of copying are free and .50 cents per copy thereafter.

### **Documents that may not be inspected:**

1. Any record protected by the lawyer-client privilege as described in s. 90.502 and any record protected by the work-product privilege, including, but not limited to, any record prepared by an association attorney or prepared at the attorney's express direction which reflects a mental impression, conclusion, litigation strategy, or legal theory of the attorney or the association and was prepared exclusively for civil or criminal litigation or for adversarial administrative proceedings or which was prepared in anticipation of imminent civil or criminal litigation or imminent adversarial administrative proceedings until the conclusion of the litigation or adversarial administrative proceedings.
2. Information obtained by an association in connection with the approval of the lease, sale, or other transfer of a parcel.
3. Disciplinary, health, insurance, and personnel records of the association's employees.
4. Medical records of parcel owners or community residents.