

# HOA Records Request Policy Template

A ready-to-adopt policy for handling homeowner document requests

How to use this template: Fill in the association name and state-specific details, review with your HOA attorney to confirm compliance with your state's statutes, and adopt by board resolution. Record the adoption in meeting minutes and keep a copy with your governing documents.

## RECORDS INSPECTION AND COPYING POLICY

Association Name: \_\_\_\_\_

State of Formation: \_\_\_\_\_

Adopted by Board Resolution on: \_\_\_\_\_

Supersedes any prior records inspection policy.

### Section 1 — Purpose & Legal Authority

This policy establishes the procedures by which members of [Association Name] (the "Association") may inspect and copy Association records, consistent with the Association's governing documents and applicable state law. [Insert applicable state statute citation.] This policy is intended to facilitate member access to records to which they are lawfully entitled while protecting sensitive information and the privacy of other members.

### Section 2 — Who May Request Records

The following persons are entitled to request inspection of Association records under this policy:

- & Current members (owners) of the Association
- & Authorized agents of current members  
*Written authorization from the member required*
- & Purchasers under contract to purchase a unit  
*To the extent required by state law or the Association's governing documents*
- & Mortgagees of record  
*To the extent required by state law or the Association's governing documents*

### Section 3 — Records Available for Inspection

The following categories of records are available for member inspection upon proper request:

- & Governing documents  
*CC&Rs, bylaws, articles of incorporation, rules & regulations, and all amendments*
- & Approved meeting minutes  
*Board and annual meeting minutes that have been formally approved*
- & Annual budgets
- & Financial statements  
*As available and as required by applicable state law and governing documents*
- & Current reserve study
- & Current insurance certificates
- & Current vendor contracts  
*Subject to redaction of proprietary pricing where permitted by law*

& Assessment account records

*An owner's own account records — not other owners' account information*

## Section 4 — Records That May Be Withheld or Redacted

The following records are not subject to member inspection or may be redacted before production:

& Executive session minutes

*Minutes of meetings held in executive session to discuss litigation, personnel, or sensitive member matters*

& Attorney-client communications

*All communications between the Association and its legal counsel*

& Attorney work product

*Documents prepared in anticipation of litigation*

& Personnel records

*Records relating to Association employees, if any*

& Individual member financial information

*Delinquency or payment information of members other than the requestor*

& Vendor bid and negotiation records

*During active procurement processes, to protect the Association's negotiating position*

& Records related to pending litigation

*Consult Association counsel before producing any records related to active legal matters*

## Section 5 — How to Submit a Request

1. Submit a written request to the Association's designated records contact (see Section 9).
2. Identify yourself as a current member or authorized agent and provide your unit/lot number.
3. Describe the records requested with reasonable specificity.
4. Specify your preferred method of receipt: digital copies, paper copies, or in-person inspection.
5. Requests may be submitted by email, mail, or delivery to the Association's designated address.

## Section 6 — Response Timeline

| Timeframe                           | Association Action                                                                                               |
|-------------------------------------|------------------------------------------------------------------------------------------------------------------|
| Within [ ] business days of receipt | Acknowledge the request in writing and identify any records that will be withheld and the basis for withholding. |
| Within [ ] calendar days of receipt | Produce available records or provide a written explanation for any delay.                                        |
| If clarification needed             | Contact the requester within [ ] business days to clarify the scope of the request.                              |

## Section 7 — Copying Fees

The Association may charge reasonable fees for copying and preparing records, consistent with applicable state law. Fee schedule:

| Format                             | Fee       |
|------------------------------------|-----------|
| Digital copies (email or download) | No charge |

|                                                                               |                                        |
|-------------------------------------------------------------------------------|----------------------------------------|
| Black-and-white paper copies                                                  | \$[ ] per page                         |
| Color paper copies                                                            | \$[ ] per page                         |
| Staff time for research and compilation (records not in routine organization) | \$[ ] per hour, first [ ] minutes free |
| In-person inspection                                                          | No charge (by appointment)             |

## Section 8 — Redaction Policy

When a record contains both disclosable and protected information, the Association will produce the record with protected information redacted. The Association will identify the basis for any redaction in its written response. Redaction does not excuse production of the disclosable portions of a record.

## Section 9 — Designated Records Contact

All records requests should be directed to:

Name / Title: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Email Address: \_\_\_\_\_

Phone: \_\_\_\_\_

*Note to boards: Insert the management company contact or a dedicated board email address here — not a personal board member's email. Records requests should be routed to an account the association controls.*

## Notes / State-Specific Amendments





This document is provided as a general governance resource for HOA boards. Consult your HOA attorney for requirements specific to your state and governing documents.

**AssocRecords.com — HOA-owned document storage built for boards that want records that stay with the association through every leadership change.**