

## **INTERVIEW AND ORIENTATION FORM for OWNER/TENANT**

The Sunshine Towers and the Sunshine Terrace are 55+ dynamic living communities, though not commercial resorts. This orientation/set of rules, is designed to ensure the peaceful enjoyment of the premises by the owners, tenants, and guests. Though the residents of both communities share the use of the pool, the clubhouse, and the elevator next to the Terrace's bldg A, each specific Board rules over their respective buildings, grounds, and parking lots. Therefore, it is requested that everyone at the Terrace reads and signs this *Interview and Orientation Checklist*. It is also to be part of the *Request for Approval of Ownership Transfer/Lease Application* filled out by any newcomer.

The owner/tenant interview is usually done at the clubhouse, ideally with two Board members present, one of which cannot be the unit owner. If there are location constraints, pre-schedule a meeting over the internet.

Though no formal interview by the Board is done with a short term guest, it is the responsibility of the unit owner/tenant that their guest complies with the Sunshine Terrace Rules and Regulations. Any guest coming to the Sunshine Terrace, should refer to this form during their stay. As a courtesy, the unit owner should inform the Board of the presence of their guests and the length of their stay. It is recommended that each unit owner keeps two copies of this form on file. Additional copies could be downloaded from our website: [www.sunshineterracecondos.com](http://www.sunshineterracecondos.com)

1. Prior to the interview, the following information/items should be collected and provided to the Board: Copy of "*Request for Approval of Ownership Transfer/ Lease Application*" form: Issue 08/06/2021 Rev. 09/07/2021 or later, completely filled out. Check that it contains the following:
  - a. The name of all buyer(s)/tenant(s) who will reside in the unit. Ensure they have all been named. If not, get them named and background checked and other preliminary steps done on them before proceeding further.
  - b. The phone number(s) of everyone who will reside in the unit.
  - c. Copy of everyone's driver's license(s) (or see step 7 below.)
  - d. Photocopy/photo of \$50 check for administrative fees made to Sunshine Terrace Condominium (or see step 10 below.)
  - e. Photocopy/photo of background check fee (\$50/single or \$80/couple)\* made to Sunshine Terrace Condominium (or see step 10 below.)
  - f. Copy of sales/lease contract
  - g. Name of real estate agent (if applicable)
  - h. Phone number of real estate agent
  - i. Optional: medical letter for Therapy animal.

The interviewer brings to the interview a cell phone, a copy of the Sunshine Terrace list of the Board members with their contact information, and a copy of the Communication Procedure, and gives them to the buyer(s)/tenant(s).

2. Contact the buyer(s)/tenant(s) to set up an appointment for an interview.
3. Make sure that the buyer(s)/tenant(s) has/have the correct version of the *Request for Approval of Ownership Transfer/ Lease Application*” form: Issue 08/06/’21, Rev. 09/07/’21 or later.
4. Prior to the interview, make sure the buyer(s) has received from the seller/title agency/Ameri-Tech Community Mgmt, a copy of all Condominium Documents including the Declaration of Condominium, Articles of Incorporation, Bylaws and Rules & Regulations. If not, refer back to the real estate agent/title company for assistance.
 

N.B.: For a tenant, the landlord gives only a copy of the *Sunshine Terrace Rules and Regulations*.
5. Prior to the interview, make sure that each buyer/tenant has read, understood and agrees to abide by all the Sunshine Terrace Rules, Conditions and terms therein, and all reasonable rules and regulations enacted thereafter officially by the Association. **In doing so, the new resident/tenant will know that the main purpose of the interview is to let him/her know that Sunshine Terrace has strict rules and expect them to be adhered to.**
6. Collect from the buyer/tenant and anyone else, the missing documentation listed in step 1 above. (i.e. driver’s license: make a photocopy/photo of it.)
7. Validate the 55+ status of the main resident with his/her driver’s license DOB.
8. Collect the \$50 check mentioned at step 1.e. above, if not already done so, by Ameri-Tech Community Mgmt.
9. Collect the \$50/\$80 for background check mentioned at step 1.f. above, if not already done so by Ameri-Tech Community Mgmt.
10. Make sure that all the blanks on the copy of “Sunshine Terrace Condominium Assoc., Inc., A 55 + Community, *Request for Approval of Ownership Transfer/Lease Application*” form are filled out, and its issue date is 08/06/2021 rev. 09/07/21 or later. If not, do so using the documents provided.
11. Verify that the buyer/tenant\*\* has read, understood and agrees to abide by all the conditions and terms of the Condominium Documents including Declaration of Condominium, Articles of incorporation, Bylaws and Rules & Regulations and to all reasonable rules and regulations enacted thereafter officially by the Association.
  - a. \*\*Tenant: For a tenant, make sure he/she has read, understood and agrees to abide by all the Sunshine Terrace Rules & Regulations received from the landlord.
12. Ask the buyer/tenant if he/she has any questions about the above?
13. Answer the question if you can, or refer the buyer/tenant to Ameri-Tech for an answer.
14. Make sure that the buyer/tenant has Ameri-Tech Community Mgmt. Inc., phone number (727) 726-8000.

Fax: (727) 723-1101.

15. Verify if the buyer/tenant already knows his/her:
  - a. Parking number: \_\_\_\_\_. (No back up parking allowed - keep car locked at all times) If the parking spot gets rented to others, the buyer(s)/tenant(s) is to inform the Board.
  - b. If the buyer(s)/tenant(s) intends to stock the car with moth balls for the summer, check with the neighbors if they mind the moth balls odor.
  - c. Storage cubicle number: \_\_\_\_\_ (Need to provide their own lock - no storage of solvents/flammable products allowed).

- d. Mailbox number: \_\_\_\_\_ (Compare with the information on the Sunshine Terrace Roster).
16. Inform the buyer/tenant that he/she should check the bulletin board next to the mail boxes for the posting of notices to the community.
  17. Inform the buyer/tenant that he/she should get from the seller/title company, all the keys of the unit, clubhouse, mail box, and to the condo storage main door. If not, get the missing keys from the Board Treasurer. The first key is free, but there is a \$5 fee for additional ones.
  18. Inform him/her of the Emergency Key Service offered by Sunshine Terrace Board.
  19. Collect the Emergency Contact personal information if not already provided.
  20. Recommend the unit owner to arrange for a damage prevention monthly inspection of their unit during the owner's prolonged absence.
  21. Inform him/her of the importance of properly addressing the mail: to always write *the building letter in front of the unit number*, not to get the mail lost/misplaced with the Sunshine Towers' mail. If space allows, add *Sunshine Terrace* to the address line.
  22. Take a photo of the buyer(s)/tenant(s) or use the photo on the driver's license.
  23. If planning to leave the car in the carport/parking lot for extended periods of time, collect the car key holder/emergency contact info (phone + email)
  24. Go through the Condo Close Down Checklist with the buyer/tenant and answer any questions.
  25. Inform the buyer(s)/tenant(s) of the pool's hours and have him/her read the pool rules signs. (i.e.: no glass containers; shower before getting into the pool; no kids jumping in the pool; no clubhouse access in a wet bathing suit or without proper coverage, etc.)
  26. Give the buyer/tenant a copy of the Sunshine Terrace Social Club Calendar of Activities and other similar information if available.
  27. Inform the buyer/tenant of the possibility to use the clubhouse for a personal venue and to contact the Sunshine Towers Board for details.
  28. Give an orientation tour of the Sunshine Terrace, specifically locating the following:
    - a. Clubhouse Sunshine Terrace office location noticing the mail slot in the door.
    - b. The wheelchair/crutches/walker location w/ sign out sheet and name of the person in charge of the durable medical equipment. Warn that the *medical equipment use is at buyer/tenant's own risk*.
    - c. The BBQ grill outside the Clubhouse belongs to the Sunshine Towers and is under the control of their own Board.
    - d. Buyer/tenant storage cubicle location.
    - e. Mail box location.
    - f. Small hazardous waste (batteries) location.
    - g. Recycling blue cans location (do not dump trash; **flatten cardboard boxes**; check the list for recyclable items on the can lid/bulletin board). The recycling cans are emptied out on Thursdays.
    - h. Building "D" BBQ grill, near the staircase, is not for public use.
    - i. Car washing station. (Bring your own sprayer)
    - j. The dumpster location: All trash needs to be put in bags, most importantly when coming down a chute; do not dump glass; the dumpsters are emptied out on Mondays & Fridays.
    - k. Appliances/Furniture Refuse Corral location (For Sunshine Terrace residents use only). No refrigerators nor microwaves, no construction debris allowed. Ask for the padlock key from either the Treasurer or the V-P.
    - l. Carport location. (Take a photo of the car and the license plate.)

- m. Locate the nearest fire extinguisher to the owner/tenant unit door.
- n. Locate the nearest Fire Emergency handle in the walkway. It alerts the firemen station directly. Fees may apply.

29. Additionally, inform the buyer/tenant of the following:

- a. that prior to moving in, he/she will need to protect the elevator with the elevator blankets located in the condo storage next to the building C elevator. For building A residents, use the Sunshine Towers elevator; its blankets are in the pool room. Once the blankets are back to their original storage place, report to the treasurer.
- b. the location of the air blower to keep his/her unit front door clean. Contact the Treasurer for the key and fill out the sign out sheet when in use.
- c. it is not allowed to hang blankets/beach towels/bathing suits, laundry items, etc., outside of the unit (i.e. on the railing outside of the building).
- d. the importance of clearing the sidewalks of flower pots/table/chairs, etc. at night for security/emergency reasons and during seasonal pressure washing.
- e. that sound travels far, therefore to keep the conversation level down when walking near the condo windows, not to disturb the residents.
- f. that foul/offensive language, threats, or disrespectful behavior towards anyone, anywhere on the premises won't be tolerated. Any complaints should be put in writing. Refer to the *Sunshine Terrace Communication Procedure*.
- g. that the Sunshine Terrace ground belongs to the condo association. If a bad deed is observed, take a photo/video clip of it and present it to one of the Board members.
- h. that only a Board member is authorized to deal with the community's suppliers/vendors.
- i. to not put in the ground any plant, anywhere in the community's soil, without prior authorization from the Board.
- j. that the sprinklers go on during the night, normally around 1:00 am.
- k. that during condo unit renovations, the owner is responsible for his/her hired staff; and to have them clean up/mop off their tracks daily before leaving the job site.
- l. that all major renovations (windows, plumbing, electrical, A/C ) must be performed by a trade licensed worker and approved by two Board members. All local government required permits must be obtained.
- m. to locate the water main valve/handle, near the water heater, for his/her unit.
- n. that if the buyer/tenant intends to renovate the unit's windows/doors, to check the information provided on the Notice Board first, and to consult with a Board member before proceeding/placing the windows/doors' order to sign the appropriate form.
- o. to remember that if the buyer/tenant intends to rent the unit, or have a roommate, that there's a three month minimum stay.
- p. that property insurance is not mandatory but strongly recommended since the Board's insurance covers for damages between the walls of the unit, but only up to the interior paint of the unit.
- p. that per the federal Fair Housing Act, a person with a disability and with a disability-related need for an animal, has an exemption from the landlord's "No Pet" policy, upon presentation of the approved documentation.
- q. that the Therapy Animal handler must be in control of his Therapy Animal at all times; with the animal on a leash and making sure that the animal doesn't bother the other unit owners/tenants.

- r. that when one encounters a Therapy Animal, to always ask permission from the handler before interacting with the animal.
  - s. that if someone has a suggestion/comment/praise, to put it in writing and drop it off at the SunshineTerrace office, at the clubhouse, through the door mail slot.
30. Make sure to answer any question or refer the tenant/buyer to the appropriate person to answer their question.
  31. Remind the unit owner that he/she is held accountable for his/her tenant's compliance to the Rules and Regulations.
  32. Collect the signed copies of this Interview and Orientation Checklist and verify that the buyer(s)/tenant(s) has initialed each page.
  33. Inform the new buyer/tenant that he/she will get a copy of the approved/denied *Request for Approval* form, once the review procedure has been completed, and that it should be filed with the Condo Docs for future reference.

Interviewer: \_\_\_\_\_  
Print

Buyer/tenant: \_\_\_\_\_  
Print

Interviewer: \_\_\_\_\_  
Signature

Buyer/tenant: \_\_\_\_\_  
Signature

Date: \_\_\_\_\_  
MM/DD/YYYY

Date: \_\_\_\_\_  
MM/DD/YYYY

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34. \* If the background check amount is different than at # 1f., explain here why: \_\_\_\_\_

35. Email to Ameri-Tech Community Mgmt. Inc. the filled out documentation at: [mdiorio@ameritechmail.com](mailto:mdiorio@ameritechmail.com) and a copy to Sunshine Terrace Condominium Association President, Jacinthe Daigle, at [daiglejacinthe@hotmail.com](mailto:daiglejacinthe@hotmail.com)

36. Complete the Sunshine Terrace Roster.

37. Give a copy of the approved/denied *Request for Approval* form to the buyer(s)/tenant(s) of the unit.

38. File the new buyer(s)/tenant(s) documents in the Sunshine Terrace Board office.