
HACIENDA CARMEL COMMUNITY ASSOCIATION

1000 Hacienda Carmel, Carmel, CA 93923

Phone (831) 624-8261 • Fax (831) 625-7805 • E-Mail:hcretire@montereybay.com

Memorandum for the Information of Applicants for Consent to Occupy

This memorandum is being handed to you on behalf of Hacienda Carmel Community Association with the intent that it will be of assistance with respect to your application for consent to occupancy.

CAREFUL reading of this memo will reduce chances of misunderstandings and give you a better knowledge of what is involved in becoming a resident of this Hacienda Community. With this memo are the forms to be submitted as your Application to the Association for permission to occupy a Hacienda unit.

The submission of all of these forms, properly executed, is a prerequisite to your personal interview with the Association General Manager and the subsequent decision by the Board of Directors. At the time of the interview, the General Manager will answer any questions you may have on points not covered in this memorandum.

The information requested is not intended to be an invasion of your privacy. Personal details are held in strict confidence. It is intended to clarify your physical and financial obligations to this privately-owned and self-governing complex. The Association obtains, at its own expense, a credit report. Your signature on the attached *Application For Consent to Occupy* authorizes the Association to request a credit report in your name and in the name of any co-applicant. Residents must fully realize and be prepared to cope with possible escalating costs of living.

HACIENDA CARMEL is an active adult community of the condominium type with 300 units conveniently grouped on some forty acres. Each unit owner, in addition to owning exclusively the air space inside their home, holds an undivided 1/300 interest in all buildings, equipment and common areas at Hacienda Carmel.

The Hacienda Carmel Community Association operates and controls the affairs of our community, an incorporated non-profit association for the residence of active senior citizens. The Association operates under its governing documents, a Declaration of Protective Restrictions, and a Maintenance Contract signed by each member. Ownership, transfer of ownership, lease or rental (more than 30 days) are strictly the function of the unit owner, but are subject to the provisions and requirements of the above documents. Full information on these matters is given to new members and all of these documents are available for inspection. When negotiating for the sale or lease of an apartment it is recommended that the General Manager be consulted.

Consent to Occupancy: Under the above documents, the occupancy of any unit by owner, renter, or guest is subject to approval by the Board of Directors. The Board is elected by the voting members of the Hacienda Carmel Community Association and acts as the operating agent for the owners and residents. The Board appoints a salaried, non-resident General Manager who is the operating executive.

The Hacienda Carmel Community Association was designed as a place of residence for the use and enjoyment of participating adults who can and will take an energetic part in the Association. Consideration is given to obtaining, as new residents, those persons who may be qualified and able to take part in the organization, operation and administration of our Association.

The minimum age for residency is 55 years, except that for husband and wife -- only one spouse need meet the 55-year requirement.

CASA CENTRAL, the clubhouse, accommodates the operational and administrative offices, lobby, dining room, an extensive library (book donations welcomed), and a card-playing area.

CASA FIESTA is a building for large gatherings and multiple uses as well as for displays of local art works, sewing and craft center, stretchercise classes and ping-pong. Other recreational facilities include a bowling green, putting green, shuffleboard courts, and a heated swimming pool. Community laundry rooms are located throughout the residential area.

CASA AMIGOS houses our guest units -- eleven motel-type rooms are available at a reasonable daily rental for guests sponsored by residents. Occupancy is limited with the consideration to availability.

For new owners, there is a transfer charge (presently \$1000.00), payable by you to the Association on your first monthly bill, covering costs involved to the Association not included in purchase escrow charges. This amount is subject to change. The monthly maintenance fee includes all charges for utilities, exterior painting, local telephone, garbage collection, gardening and landscaping in the common areas (excluding patios). Long distance calls and TV cable charge, along with any special maintenance and dining room meal charges, will be documented on the monthly statement issued for each unit.

The monthly maintenance fee is based on the size of each unit on a non-profit computation of total costs determined on an annual basis by the Association's Board of Directors and prorated to the individual units.

Property taxes, based on the assessed valuation of the individual unit, are paid directly to the County Tax Collector by each individual owner. Insurance for the buildings is covered by the Hacienda Association but each owner is responsible for their personal property within their units.

Information and various requests are handled through the Reception Desk in the Casa Central lobby. Requests for maintenance services, reservations for the dining room and guest units should be channeled through this point -- dial "0" from your unit.

Community fire protection is provided by a fire station at 3775 Rio Road -- just west of Carmel Rancho Center.

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APPLICATION FOR CONSENT TO OCCUPANCY

Name: (Mr. Mrs. Ms.) _____
Last First Middle

Name Spouse: _____
Last First Middle

Address: _____
Street City State Zip

Telephone: Home _____ Business _____

Social Security Number: Self _____ Spouse _____

Date of Birth: Self _____ Spouse _____

Negotiations in Process: Expected Closing Date _____

Name of Realtor: _____

To Purchase Unit # _____ To be only home _____ Second home _____

To Lease Unit # _____ Number of Months: _____ Starting _____

Anticipated Property Use:

Desired date to occupy: _____

Normal residency will be _____ months per year.

Other residence will be in _____ for _____ months per year.

Renting of Unit No. _____ during owner absence is ___ or, is not ___ anticipated.

Occupation (past or present): Self _____

Spouse _____

Business or Professional Affiliation Prior to Retirement:

Self: _____

Spouse: _____

Date of Retirement: _____

Self Spouse

List memberships in civic, social, charitable organizations (Self/Spouse)

Hobby and Sport Interests: Golf _____ Lawn Bowling _____ Shuffleboard _____
Bridge _____ Woodworking _____ Gardening _____ Handcraft _____ Painting _____
Other:

Names and Addresses: (Children or next of kin, please indicate relationship)

Do you have any pets? _____ Yes _____ No

Personal References:

_____	_____
Name	Name
_____	_____
Address	Address

Friends living at Hacienda Carmel:

_____	_____
Name	Name
_____	_____
Name	Name

Hacienda Carmel Community Association functions to serve the members in a variety of ways. A careful review of the Ground Rules will be helpful in understanding how the Association is operated and what is expected of unit owners and lessees. It is important to note that the Association cannot be responsible for the personal or medical care of the unit owners. For that reason, it is requested that you provide the following information, so that in the event of a medical or other type of emergency the appropriate individuals can be contacted by the staff.

Emergency Contact(s):

_____	_____	_____
Name	Address	Phone
_____	_____	_____
Name	Address	Phone

Individual(s) Capable of Making Financial Decisions for the Applicant:

_____	_____	_____
Name	Address	Phone
_____	_____	_____
Name	Address	Phone

It is understood that this application and the supporting financial responsibility report must be in hand at the Hacienda Carmel Community Association offices before an interview with the Membership and Occupancy Committee or their appointed representatives can be arranged. It is also understood that no act of occupancy (furniture placement, personal goods storage, or personal use) may occur before receipt of a written consent to occupy from the Board of Directors of the Hacienda Carmel Community Association. *In addition I (we) acknowledge the receipt and reading of the Hacienda Carmel Ground Rules.*

Applicant(s)

Date

For Association Use:

Application and reports received: _____

Recommendation to the Board of Directors: _____

FINANCIAL UNDERSTANDING

(Not Applicable to Lessees)

Discussion: The Board of Directors, with advice of the Financial Committee, controls the monthly fee levied on the Hacienda Carmel Community Association owners to defray the expenses of operating and maintaining the Hacienda. The sum total of these expenses is divided into individual shares dependent upon the size of the unit occupied. The unit owner is billed accordingly. Added to this share are individual charges for special services arranged for by the owner. An increase in the cost and usage of utilities or other services could trigger an increase in maintenance fees. Members' finances should be sufficiently ample and flexible to accommodate changes that could occur.

Rather than attempt to delve into the financial status of the applicant, the Board of Directors is willing to accept a simple Declaration of Financial Responsibility:

I/We hereby state that I/We are financially able to accommodate such possible changes in monthly fees as may be declared by the Board of Directors of the Hacienda Carmel Community Association.

Dated _____
