

Martins Farm Homeowners' Association

Records Inspection Policy

Purpose

This policy establishes reasonable procedures for HOA members (homeowners) and their duly appointed representatives to inspect and copy Association records, as required by Section 14.14 of the Declaration of Covenants, Conditions, and Restrictions and applicable Georgia law. The goal is to promote transparency while protecting the Association's resources and the privacy of its members, taking into account that the Association is managed entirely by volunteer Directors with jobs, homes and family responsibilities. A Director must be present during the inspection.

Records Available for Inspection

Members may inspect and copy the following records at reasonable times and for purposes reasonably related to their interest as a member:

- This Declaration, the Bylaws, and any rules or use restrictions adopted by the Association.
- The membership register (list of owners).
- Books of account and financial records (including the annual financial statements prepared on the cash basis).
- Minutes of meetings of the members, the Board of Directors, and committees.

Directors have broader inspection rights as stated in the Declaration.

Note on Detailed Financial Information:

Detailed financial spreadsheets showing individual expenses and income breakdowns are provided to homeowners who attend quarterly meetings. A high-level summary is included in the publicly posted meeting minutes. The full spreadsheet is not published on the website as the site is not password protected. Full detailed records remain available upon proper written request.

Procedure for Inspection Requests

1. **Written Request Required:** Any member (or their duly appointed representative) wishing to inspect or copy records must submit a written request to the Board or the Association's designated custodian (currently the Secretary or Treasurer). The request should:
 - State the specific records requested.
 - Describe the purpose of the request (which must be reasonably related to the member's interest as an owner).
 - Include the member's name, address, and contact information.
2. **Advance Notice and Scheduling:**

Because the Association is managed by volunteer Directors with jobs, homes and family responsibilities, requests should be made with as much advance notice as possible. The Board will make reasonable efforts to schedule and complete the inspection **within 30 days** of receiving a proper written request, as Board and custodian schedules allow. The exact date, time, and location will be coordinated with the requesting member and confirmed in writing.
3. **Time and Place:** Inspections will occur at a reasonable time and place designated by the Board (typically during normal business hours at the clubhouse). Inspections are generally limited to **one (1) hour** per request unless additional time is approved in advance.
4. **No Disruption:** Inspections must not interfere with the ordinary business or operations of the Association.

Copying Records

- Members may make copies at their own expense using their own equipment during the inspection, or
- The Association will provide copies upon payment of a reasonable fee to cover actual costs of reproduction and labor fees.
- The Board may require payment of reasonable copying costs and labor fees in advance.

Limitations and Restrictions

- Records will only be provided for proper purposes directly related to the member's legitimate interest as an owner.
- The Association may deny requests that are not made in good faith, are overly broad, harassing, or for commercial purposes.
- Confidential or privileged information (such as attorney-client communications or sensitive personal information) will not be disclosed.
- The membership list will be provided only in accordance with Georgia law and will not include email addresses or other sensitive contact details.
- Records older than a reasonable period (generally the past 3–5 years for most documents) may be limited if they are no longer maintained in active files.

Directors' Rights

Every Director has the absolute right to inspect all books, records, and physical properties of the Association at any reasonable time, including the right to make copies at the Association's reasonable expense.

Compliance with Declaration

This policy is intended to implement the reasonable rules contemplated in Section 14.14 of the Declaration. It does not limit any rights granted by the governing documents or Georgia law.

Amendments

The Board of Directors may amend this policy from time to time as needed.

Adopted by the Board of Directors on April 13, 2026

Martins Farm Homeowners Association

Records Inspection Request Form

Date of Request: _____

Requester Information (must be a current homeowner or their duly appointed representative):

Name: _____

Address: _____

Email: _____ Phone: _____

Records Requested (please be as specific as possible):

Purpose of the Request (must be reasonably related to your interest as a member):

I understand and agree to the following:

- I will schedule the inspection at a mutually convenient time within approximately 30 days, as volunteer Board Member schedules allow.
- I am responsible for any reasonable copying costs and labor fees as described in the Records Inspection Policy Section 14.14 of the Declaration.
- The inspection will be conducted in accordance with the Association's Records Inspection Policy and Section 14.14 of the Declaration.
- The requested records will be used only for a proper purpose related to my interest as a homeowner.

Signature: _____ Date: _____

For Association Use Only

Date Request Received: _____ Received By: _____

Scheduled Inspection Date, Time, Location : _____, _____, _____

Copying Cost: _____ Collected By: _____ Date: _____

Notes: