THE AMBERLEA AT SOUTH RIDING CONDOMINIUM UNIT OWNERS ASSOCIATION

POLICY RESOLUTION NO. 2026-10

(supersedes 2018-01)

(Record Retention and Requests for Examination and Production of the Association's Records)

WHEREAS, Article 3, Section 3.1 of the Amberlea at South Riding Condominium Unit Owners Association Bylaws shall have all of the powers and duties necessary for the administration of the affairs of the Unit Owners Association and may do all such things as are not by the Condominium Act or Condominium Instruments required to be exercised and done by the Association; and

WHEREAS, Article III, Section 3.1(l) of the Bylaws provides that the Association's books and records shall be available for examination by the Owners and first mortgagees, their duly authorized agents or attorneys, during general business hours on business days at the times and in the manner that shall be set and announced by the Board for the general knowledge of the Unit Owners; and

WHEREAS, Section 55.1-1915 of the Virginia Condominium Act, Code of Virginia (1950, as amended) ("Act") requires each Unit Owner of a Unit to be governed by and comply with all of the terms of the Declaration, Bylaws and Rules of Regulations of the Association ("Condominium Instruments"); and

WHEREAS, Section 55.1-1945 of the Virginia Code requires the Association to provide the unit owners who are in good standing with the right to examine and copy certain records of the Association, subject to certain procedures approved by the Board; and

WHEREAS, Section 55.1-1945 (D) of the Virginia Code provides that the requesting unit owner shall be responsible to the Association for paying or reimbursing the Association for any reasonable costs of material and labor incurred by the Association in responding to the request for the books and records and review for redaction of the same; and

WHEREAS, Section 55.1-1945 (D) of the Virginia Code requires the Association to adopt a policy adopting a cost schedule that (i) specifies the charges for materials and labor; (ii) applies equally to all unit owners in good standing; and, (iii) is provided to any unit owner requesting to review and/or copy the Association's books and records at the time the request is made; and

WHEREAS, the Board has decided that is in the best interest of the Association to adopt a written policy regarding the provision of records to its unit owners to comply with its pending statutory obligation.

NOW, THEREFORE, BE IT RESOLVED THAT the Board adopts the following policy:

A. Record Retention

a. The Association shall permanently retain the following books and records:
   i. Declaration, Bylaws, Articles of Incorporations, Policy and Administrative Resolutions, and all amendments thereto.

ii. Deeds and other property records pertaining to the Association.
iii. Tax documents.
iv. Audit reports.
v. Minutes of all Board, Committee and membership meetings.
vi. Annual Reports filed with the Common Interest Community Board.
vii. Formal records of all actions taken by the membership or Board without a meeting.
viii. Record of all actions taken by a committee of the Board in place of the Board on behalf of the Association.
ix. Association Attorney file, including lawsuits.
x. Reserve studies.
xi. Unit Owner files that include any violation notices, applications for exterior modifications or other actions taken by the Association that pertain to a specific Unit.
xii. Building Plans and Plats.
xiii. Membership Lists.

b. The Association shall retain the following records for at least seven (7) years:
i. Bank statements.
ii. Deposit tickets.
iii. Canceled checks.
iv. General ledgers.
v. Cash receipts and cash disbursements journals.
vi. Monthly financial statements.
vii. Payroll records (if any).
viii. Employee files (if any).
ix. Management Reports.
x. Budgets.
xi. Settled insurance claims.

c. The Association shall retain the following records for at least five (5) years:
i. Contracts that are no longer active.
ii. Insurance policies that are no longer active.
iii. Vendor invoices.
iv. Annual meeting proxies, notices, and election materials.
v. Ballots and other records of votes conducted at meetings of Members.
vi. Board Member emails that demonstrate an action outside of a meeting.

d. The Association shall retain following records for at least three (3) years:
i. Correspondence or records involving personal injury (retain records from date of alleged injury).

e. The Association shall retain the following records for one year:
i. Emails pertaining to Association that are not preserved and do not otherwise fall under the other categories set forth in subsections a-d of this Section A.

B. Record Keeping and Access to Records

1. Acting on its own or through a managing agent, the Association shall prepare and keep, detailed books and records of receipts and expenditures affecting the operation and administration of the Association and specifying the maintenance and repair expenses of the common elements and other expenses incurred by or on behalf of the Association. With respect to all books, records and/or files relating to matters other than those noted above, the Association shall keep those books and records for such reasonable time periods as determined by the managing agent.

2. Subject to certain exceptions set forth below, unit owners shall have the right to examine and copy these books and records, provided that their membership is in Good Standing and the request is for a proper purpose related to the unit owner's membership in the Association and not for pecuniary gain or commercial solicitation. "Good Standing" shall be defined to mean that a unit owner is current in the payment of assessments and any other financial obligation to the Association and compliant with all other provisions of the Association's Declaration, Bylaws and rules and regulations.

3. In order to exercise the rights described herein, unit owners must complete the attached Record Request Form, attached hereto and incorporated herein as Exhibit A and file it with the Association's managing agent. After receipt of a Record Request Form, the Association's representative shall review the form and determine if it is complete and satisfies all requirements necessary to allow the Association to act upon the filing. If a form is not complete, the Association shall notify the unit owner of the deficiency, required corrective action, and that no records shall be made available until the unit owner takes such corrective action.

4. Within five (5) business days after receipt of a completed form, the Association's managing agent shall provide the unit owner with the cost schedule attached hereto as Exhibit B, and incorporated herein, as well as an estimate on the costs associated with responding to the request. An estimate may include, but not be limited to, the costs of locating, duplicating, and supplying the records, which includes the cost of materials and labor. Prior to the Association performing any work related to the request, the unit owner must pay the estimated charges. Upon receipt of payment (or clearance of a personal check), the Association shall make arrangements for a meeting at a mutually convenient time or provide the unit owner with copies of the requested records within five (5) business days of receipt.

5. Whenever a unit owner makes a written request to examine original records, the Board shall have a member of its management staff meet with the unit owner to serve as a custodian of the records. The Association will include the cost of this service in the estimate and may establish reasonable limitations on the conduct and duration of such meeting.

6. After rendering the requested services, the Association shall compare the estimate with the actual costs incurred by the Association as set forth in the cost schedule. If the amount paid by the unit owner exceeds the actual costs, the Association shall refund the difference to the unit owner. If the actual costs exceed the estimate, the Association shall notify the unit owner and the unit owner shall pay the difference within fifteen (15) days of such notice. The Association may withhold additional services and/or copies until it receives payment.

B. Exempt Records

The following records are exempt from the unit owner' right to examine and copy:

1. Personnel matters related to a specific, identified persons or a person's medical records;

2. Any documentation which relates to a (i) contract, lease and other commercial transactions currently in or under negotiation; (ii) pending or probable litigation; (iii) matters involving state or local administrative or other formal proceedings before a government tribunal for enforcement of the condominium instruments or rules and regulations;

3. Communications with legal counsel that relate to Section B(2) or that are protected by the attorney-client privilege or the attorney work product doctrine;

4. Disclosure of information in violation of law;

5. Meeting minutes or other confidential records of an executive session of the Board or any of its committees;

6. Documentation, correspondence or management or Board reports compiled for or on behalf of the Association or the Board by its agents or committees for consideration by the Board or its committees in executive session;

7. Individual unit owner or member files, other than those of the requesting unit owner; or

8. Any drafts or other documents not yet approved by the Board or its committee for incorporation into the Association's books and records.

These books and records may be withheld in their entirely to the extent that an exclusion from disclosure, as set forth above, apples to the entire content of such books and records. If only potions of the books and records contain information subject to an exclusion from disclosure, as set forth above, the Association may withhold or redact the excluded portion, and the costs associated with the time spent redacting the documents shall be absorbed by the requesting owner pursuant to the Exhibit B.

C. Requests of Minimal Time and Cost

If the Association concludes that a request submitted by a unit owner involves a nominal amount of time and cost to the Association, it may, in its sole discretion, waive any of the above requirements. For purposes of this Resolution, "nominal requests" may include requests for copies of:

1. Approved minutes or highlights of the most recent meeting of the Board of Directors or membership Meeting;

2. Approved minutes or highlights of the most recent meeting of any committee;

3. The Association's current annual operating budget;

4. The Association's most current financial management report;

5. The Association's most recent annual audit;

6. The Association's most recent income tax forms; and

7. The file of the requesting unit owner.

If the Association decides to waive the cost associated with reproduction, the requesting unit owner shall still be responsible for covering any copy costs incurred by the Association unless such costs are also waived by the Board.

D. Miscellaneous

1. The Association shall not have any obligation to create documents in response to any unit owner's request for records.

2. The Board shall have the right to amend the cost schedule attached hereto as Exhibit B without having to amend the entire Policy Resolution but shall be required to issue notice to the membership of any update.

3. This Policy Resolution shall supersede and replace all previously enacted Policy Resolutions related to records access, production and retention.

This Policy Resolution shall become effective on October 23, 2026.

THE AMBERLEA AT SOUTH RIDING CONDOMINIUM UNIT OWNERS ASSOCIATION

By: Daniel Vargas, President

Exhibit A
RECORD REQUEST FORM

You may use this form to request copies of or inspect the official records of The Amberlea at South Riding Condominium Unit Owners Association ("Association"). In order to properly submit a request, please complete, sign and date this form and mail or fax it to the Association's common interest community manager at the address below:

The Amberlea at South Riding Condominium Unit Owners Association
c/o SFMC, Inc.
9464 Innovation Dr
Manassas, VA 20110

Name of Requesting Party:

_____

Mailing Address:

_____

Address of Unit located within the Association if different than mailing address:

_____

_____

Phone: (Home) _____ **(Work)** _____
(Mobile) _____ **(Email)** _____

Please describe the records you wish to copy and/or inspect (include all relevant, dates, names or other identifying information as the request must be specific):

_____

_____

Please describe the purpose of your request:_____

_____

_____

Please check applicable box(es):

I am requesting to receive copies of the above-referenced records. [ ]
I am requesting to conduct an in-person inspection of the above-referenced records. [ ] I am requesting to inspect such records on _____ at _____.
(The Association will provide you confirmation of the appropriate time, date and location for the inspection)

Please note, not all Association records are available for review and inspection. You will be notified if your request contains records subject to withholding or redaction. You will also be notified of the estimated cost, if any, related to your request and such charges must be paid in advance of the Association fulfilling your request.

Be advised, the Association is only obligated to respond to record requests from those unit owners of the Association who are in good standing and the request is for a proper purpose related to membership in the Association and not for pecuniary gain or commercial solicitation.

You must date and sign this form.

Signature:_____
Date:_____

Received by:_____
Date:_____

EXHIBIT B

Cost Schedule

Hourly rate for assembly, copying of or redacting materials**: $125.00 per hour

Hourly rate for serving as custodian of records: $125.00 - $150.00 per hour

The charges shall be billed in 15 minute increments.

Copies shall be billed at a rate of $.20 per page

Mailing costs shall be billed at any actual rate imposed by the U.S. Postal service for standard first class mailing, unless the unit owner requests an alternative mailing method, in which case all actual rates imposed by the requested carrier shall be billed directly through to the requesting party.

** Legal review may be required prior to any redacting of records in which case the costs quoted above will also include the actual costs of any legal fees incurred by the Association as may be estimated by the Association after consultation with legal counsel. Typical hourly rates for legal counsel range from $225.00 - $500.00 per hour.

RESOLUTION ACTION RECORD 2026-10

Duly adopted at a meeting of the Board of Directors held **October 7, 2026.**

Motion by: Daniel Vargas Seconded by: Cypriana McCray

VOTE:	YES	NO	ABSTAIN	ABSENT
Daniel Vargas President	X			
Robert W. Patton Vice President	X			
Cypriana McCray Treasurer	X			
Secretary				
Director				

Resolution effective: October 23, 2026.

Signature: Daniel Vargas
Daniel Vargas (Oct 23, 2026 11:58:15 EDT)

Signature: Robert W. Patton
Robert W. Patton (Oct 23, 2026 12:14:22 EDT)

Signature:
Cypriana McCray (Oct 26, 2026 13:50:04 EDT)