

MUST Provide §38-33.3-317(1)

- Financial statements for the past 3 years and tax returns of the association for the past 7 years;
- A list of the names, email addresses and physical mailing addresses of the current board members and officers;
- The most recent annual report (if any) delivered to the Secretary of State;
- Financial records sufficiently detailed to enable the association to provide an owner with a written statement stating the amount of unpaid assessments currently levied against the owner's unit;
- The association's most current reserve study (if any);
- Current written contracts to which the association is a party and contracts for work performed within the past 2 years;
- Records of board or committee actions to approve or deny any requests for design or architectural approval from owners;
- Ballots, proxies and other records related to voting by owners for 1 year after the election, action or Vote to which they relate;
- Resolutions adopted by the board relating to the characteristics, qualifications, rights, limitations, and obligations of members; and,
- All written communications within the past 3 years sent to all owners

MAY Provide §38-33.3-317(3.5)

- Architectural drawings, plans, and designs, unless released upon the written consent of the legal owners of the drawings, plans, or designs;
- Contracts, leases, bids or records related to transactions to purchase or provide goods or services that are currently in or under negotiations; Communications with legal counsel that are otherwise protected by attorney- client privilege or the attorney work product doctrine;
- Disclosure of information in violation of law;
- Records of an executive session of an association board;
- Records relating to or concerning individual units other than those of the requesting owner; or
- The names and physical mailing addresses of unit owners if the unit is a time- share unit.

MUST Withhold §38-33.3-317(3.5)

- Personnel, salary, or medical records relating to specific individuals; or
- Personal identification and account information of members, including bank account information, telephone numbers, email addresses, driver's license numbers, and social security numbers.