



DOCUMENTS AND RECORDS ACCESS POLICY

Effective February 17, 2026

1.0 BACKGROUND

As a Limited Expense Community, the King's Deer HOA requirement for record access can be found in Section XI of the Bylaws, which states the following:

"BOOKS AND RECORDS: The Association shall make available to Owners and Mortgagees, current copies of the Declaration, Bylaws, other rules concerning the Project, and the books, records, and financial statements of the Association. "Available" means available for inspection, upon request, during normal business hours or under other reasonable circumstances."

2.0 DOCUMENT ACCESS PROCEDURES

King's Deer HOA maintains business records in either paper form or electronic form, much of which is readily available to members on the HOA's website at www.Kingsdeer.org. Documents older than three years may be removed and archived. Certain documents (e.g. contractual matters, legal matters, documents carrying attorney-client privilege, employee information, resident personal information, and others) may be deemed "not available" to the general membership for review or reproduction. The Board of Directors reserves the right to limit or prohibit the distribution of sensitive information.

Written Request. Member requests to review or obtain copies of documents or records may be submitted either by email or written request and MUST contain the following information:

- Member name, phone/cell number, and email address
- KD Property address and mailing address
- Specific documents or records requested
- Paper or digital format
- Delivery method (US Mail, email, other)*

*Requestor must specify an alternate recipient if different from the requestor.

3.0 REPRODUCTION FEE

Upon receipt of the written request, the cost of fulfilling the request will be provided to the requester and payment is required in advance. Simple requests to point members to a digital link on the website can be managed with no fee. More complex requests may incur reasonable costs for copying, administrative time, and mailing expenses. Generally, the following fees will apply:

- Administrative Fee
- Paper Copy Per Page Fee
- Case-Specific Miscellaneous Expenses

4.0 RESPONSIBLE HANDLING OF DOCUMENTS

While most HOA documents are available publicly on the HOA website, owners have a responsibility to handle all HOA documents and records with prudent care to limit damages or liability arising from the information they obtain.

5.0 RECORD RETENTION

Certain documents must be maintained for specific periods of time to support the ongoing HOA business requirements, for legal and/or tax purposes, and to support member information requests:

DOCUMENT TYPE	RETENTION REQUIREMENT
Employment Tax Records	5 Years
Income Tax Records	7 Years
Financial Statements	Indefinitely
Financial Statement Support	7 Years
Insurance	Indefinitely
Legal	Indefinitely
Contracts	5 Years after Contract Completion
Reserve Project Documents	Indefinitely
ACC Documents	Indefinitely
BOD Business Activities	Indefinitely
Annual BOD Member Voting Records	1 Year
Amendment Voting Records	Indefinitely if Change Approved
Owner Communications	3 Years
Covenant Complaints	3 Years

Some documents not needed to support the above areas may be purged as needed.

6.0 AMENDMENTS

All previous policies on document and records review, and on copying HOA documents and records are rescinded and replaced by this policy.

Originally approved by the King's Deer HOA Board of Directors on December 20, 2007
Reviewed and amended by the King's Deer HOA Board of Directors on February 17, 2026