

APPOA POLICY & PROCEDURES



POLICY SECTION: General
POLICY NO: GEN 1.1
POLICY TITLE: Document Request Policy
EFFECTIVE DATE: September 25, 2026

I. PURPOSE

Requests for documents must be submitted electronically utilizing the community website via Residents/Online forms/BOD/GM Suggestions or Questions for the GM/BOD. The resident must identify the requested document and the specific purpose of requesting that document.

II. POLICY

- A. There is a minimum charge of \$200.00 for the staff to retrieve any document that is not available on the community website. Every hour after that will be charged at a rate of \$50.00 per hour or a portion thereof. Copies will be charged at a cost of \$0.25 per copy.

Members will receive an estimate of cost prior to retrieval and must pay in advance of obtaining the documents.

Requests will be handled in the order they are received, and response times will vary based upon the amount and nature of documents requested. Most requests will be handled within 10 business days.

- B. Albemarle Plantation Property Owners Association, Inc. (APPOA), a North Carolina non-profit corporation, and its wholly owned subsidiary, which operates its Recreational Amenities, Albemarle Plantation Properties, Inc. (APPI). The Association maintains the following records, many of which are provided on the community website.
- All documents provided by the developer, such as community maps, plats, plans, land surveys, and permits.
 - Recorded Declaration of CC&Rs, Articles of Incorporation, Bylaws, and any amendments.
 - Rules and Regulations.
 - All board and membership meeting Notices and Minutes, and related documentation.
 - Membership roster including members' mailing addresses, units/lots, and telephone numbers.
 - The association's insurance policies.
 - The association's third-party agreements or contracts.

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- Copies of Judgments, Liens, or any encumbrances recorded against, or on behalf of, the association.
 - Recorded instruments related to all properties owned by the association.
 - Documents related to membership voting and the election of officers and directors, such as Ballots, Proxies, Notices, and Minutes.
 - All rental records of the association, if it acts as a rental agent.
 - All association accounting records for the past 3 years, including but not limited to:
 - a. Records of receipts and expenditures,
 - b. Current account ledgers for each member reflecting name, amount and due date of each annual assessment, payments made, and current balance due,
 - c. All association financial reports, reviews, and audits,
 - d. All contracts for work to be performed, including bids,
 - e. Invoices for purchases made by the association.
 - Other association official records relating to the operation and management of the community.
 - All association insurance records.

III. DEFINITIONS

IV. LEGAL AUTHORITIES & OTHER REFERENCES

V. RELATED POLICIES

VI. PROCEDURES

VII. ATTACHMENT(S)

VIII. REVISION HISTORY

Document History		
History	Date Effective	Reason for Change
Origination	September 25, 2026	
Revision 1		
Revision 2		