

## BERTONA STEPS

### SECONDARY OWNERSHIP DOCUMENT REQUEST

Please provide the documents requested below no later than \_\_\_\_\_. We have enclosed a link to a shared folder for ease of transfer.

#### [OWNERSHIP DOCUMENT REQUEST](#)

#### DOCUMENTS

- Easements
- Parking Plans | Site Plans
- Warranties

#### CONTACT INFORMATION

- Architect
- Broker Listing
- Broker – Procuring
- CPA
- General Contractor
- Insurance Agent – Building
- Legal
- Other

#### ACCOUNTING

- Appraisal
- Budget
- CAM Reconciliation Notices
- CAM Reconciliation Prior Year
- Forecast
- Prior Month Reconciled Financials
- Breakdown of Tenant Security Deposits
- Trial Balance (debits and credits for each line item)

#### MAINTAINENCE | PROJECTS

- Equipment List
- Capital Improvements