

Commercial owner-user document workpaper

Property / legal lot: _____

Proposed operation and essential opening hours: _____

Strata corporation / commercial section, if any: _____

Purchase review deadline / latest meeting date: _____

Use this page with the actual title, plan, bylaws, Form Bs and attachments, budgets, minutes, insurance and alteration documents. It is not an approval certificate. Keep private transaction documents securely; share only the material needed for the recipient's task.

Business requirements and supporting rights

Essential requirement	Exact document / clause / date	Responsible body or rights holder	What remains unresolved	Action and required timing
Intended activity and operating hours				
Customer / staff access and parking				
Loading / waste / storage				
Signage / roof equipment / service routes				
Buildout and ongoing alteration obligations				
Insurance and lender acceptance				

Fee reconciliation: enter each obligation once

Account	Latest effective period	Monthly total payable	Reserve amount already included	Included in another consolidated payment?
Strata corporation				
Commercial section, if any				

Confirm whether the two amounts are distinct before adding them. Identify a consolidated payment's components rather than adding the consolidated figure to its own breakdown. Blank means unknown, not zero. A confirmed absence of a separate section fee can be recorded as zero with its supporting explanation.

Hypothetical distinct fees: corporation \$410 including \$70 reserve; section \$185 including \$35 reserve. Monthly payable = $\$410 + \$185 = \$595$. Twelve months at unchanged rates = \$7,140. The reserve component is \$105 but is not added again. Corporation-only budgeting omits $\$185 \times 12 = \$2,220$. The incorrect double-addition is $\$595 + \$105 = \$700$, an overstatement of \$105 a month or \$1,260 a year.

Changed-fact example: old corporation \$380 plus section \$185 = \$565. A later approved corporation rate of \$410 changes the total to \$595 for its applicable period. Difference \$30 a month; twelve-month run-rate difference \$360. Use actual effective dates for a partial-year budget; do not assume retroactive application.

Non-recurring and missing information

Record each approved levy separately with resolution, lot allocation, due date and purchase-contract treatment. Record a proposed project separately from an approved levy. A missing repair quote leaves that cost and the complete cash requirement unresolved; it is not a zero-cost item. Tenant reimbursement, if any, needs a separate lease basis and collection assumption.

Missing record: _____

Requested from / authorization / request date: _____

Later meeting or insurance change affecting earlier documents: _____

Essential business dependency unresolved: _____

Decision needed before the contract deadline: _____

This sheet does not calculate legal allocation, special-levy liability, tax, insurance adequacy or lease recovery. It reconciles the stated recurring fee assumptions and helps identify documents needed for a purchase decision.