

## PUBLIC REPORT AMENDMENT/RENEWAL APPLICATION

RE 635 Part II (Rev. 9/24)

### INTRODUCTION

- Step 1. Complete Part III. Answer all questions.
- Step 2. Complete Part II. For each item number shown in column #1 of Part II, consult Part III and transfer your answer to column #2. Enter Yes, No, or NA.
- Do not leave any blanks. If a question does not apply mark it NA.
- Step 3. Compare your transferred answer in column #2 to the “Qualifying Answer” in column #3. If the answers in column #2 and column #3 are the same, you must submit the corresponding document named in column #4. Part III of this Application provides further information on the specific document required, as shown in the following example:
- If YES, submit exemplar promissory note(s) and deed(s) of trust completed in sample form.
- Step 4. Compile and tab documents with the number shown in column #1. If more than one document needs to be submitted in response to a single question, tab each document with the same number. If a single document serves more than one document requirement, affix tabs with each of the pertinent item numbers to that document.
- Step 5. In column #5, indicate with a check mark which items you are submitting with your initial filing.

### EXAMPLE (from Part III)

#### 19. Financing

- A. Will the buyer be offered financing by other than a State- or  
Federally-regulated lender? ..... ☐ NO ☒ YES ☐ NA

If YES, submit exemplar promissory note(s) and deed(s) of trust completed in sample form.

### EXAMPLE (FROM PART II)

Column #1	Column #2	Column #3	Column #4	Column #5	Column #6
Part III Item Number	Your answer from Part III	Qualifying Answer	Document Required (If columns #2 & #3 Match)	Document Submitted	Required for SCA
19A	<b>YES</b>	YES	Promissory Notes/Deed of Trust	✓	

- ✓ Answers in columns #2 and #3 match; document in column #4 must be submitted.
- ✓ Enter a check mark in column #5, if document is being submitted with application.

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### INDEX/CHECKLIST

- Additional items not listed below may be required for issuance of a public report.
- Do not write in column #6 — it is for DRE use only.

TRACT NAME/NUMBER				FILE NUMBER	
Column #1	Column #2	Column #3	Column #4	Column #5	Column #6
Part III Item Number	Your answer from Part III	Qualifying Answer	Document Required (If columns #2 and #3 match)	Document Submitted	DRE Use Only
Does not apply	Always	Submit	RE 635		
12A	Always	Submit	Ten address labels for SRP & Subdivider		
12B	Always	Submit	Copy of pages 1 and 2 with filing fee attached		
12C	Always	Submit	Current preliminary title report, etc.		
12E	Always	Submit	Vicinity map		
13	Always	Submit	Copy of most recent public report		
14A		Yes	Sample escrow instructions/escrow depository information		
14B(1)(a)		Yes	CC&Rs		
14B(1)(b)		Yes	Bylaws		
14B(1)(c)		Yes	Articles of incorporation		
14C		Yes	Condominium plan		
14D		Yes	Sample deposit receipt/agreement to purchase		
14E		Yes	Sample Grant Deed		
14F		Yes	Lease		
14G(1)		No	Annexation particulars		
15B		No	Utilities information		
15C(1)/(2)		No	Road information		
15D		Yes	District information		
15E(1)(a)		Yes	Copy of permit to issue shares or RE 699B		
15E(1)(a)		No	RE 699B		
15G	Always	Submit	School information		
15H(1)		No	Fire will serve - SRA		

Column #1	Column #2	Column #3	Column #4	Column #5	Column #6
Part III Item Number	Your answer from Part III	Qualifying Answer	Document Required (If columns #2 and #3 match)	Document Submitted	DRE Use Only
15I(7)		Yes	Budget information		
16C		Yes	Successor-in-interest information		
16F		Yes	Transfer fee document		
17B(1)		Yes	Notice of completion/Certificate of occupancy		
17B(2)		Yes	Notice of completion/Certificate of occupancy		
17B(2)		No	Evidence of compliance with §11018.5 B&P Code		
17C(1)		Yes	Copy of the recorded Grant Deed		
17C(2)		Yes	Explanation (common area to HOA)		
17E(1)		Yes	Notice of completion/Certificate of occupancy		
17E(2)		Yes	Notice of completion/Certificate of occupancy		
17E(2)		No	Evidence of compliance with §11018.5 B&P Code		
17F(1)		Yes	Sample Existing Subdivision Interest Disclosure Statement		
17F(2)		Yes	RE 639		
			Inspection Report, pursuant to Health and Safety Code 17973(m), if applicable		
17F(2)(a)		Yes	Financial Statements		
			HOA's adopted budget		
			Reserve Study		
			Assessment & Reserve Funding Disclosure Summary per CC 5570		
			HOA's operating and reserve bank statements		
		No	Reserve Study		
			Utility Bills		
			Income and Expense Statements		

Column #1	Column #2	Column #3	Column #4	Column #5	Column #6
Part III Item Number	Your answer from Part III	Qualifying Answer	Document Required (If columns #2 and #3 match)	Document Submitted	DRE Use Only
17F(3)(a)		Yes	Financial Statements		
			HOA's adopted budget		
			Reserve Study		
			Assessment & Reserve Funding Disclosure Summary per CC 5570		
			HOA's operating and reserve bank statements		
		No	Reserve Study		
			Utility Bills		
			Income and Expense Statements		
18A, B, C, D, E, or F		Yes	Written explanation		
			HOA's Financial Statements		
			HOA's adopted budget		
			Reserve study		
			Assessment and Reserve Funding Disclosure Summary, CC5570		
			Assessment Delinquency Report		
			HOA's operating and reserve bank statements		
			Duplicate budget package		
19A		Yes	Subsidy/maintenance documents		
20A		Yes	Promissory notes/deeds of trust		
20C		Yes	Financing details		
21B(2)(a)		Yes	Security instrument		
21B(2)(b)(2)		No	Other arrangement		
22		Yes	Details and documents		
23		Yes	CFPB documents		
24A		Yes	Conditional public report statement		
24C		Yes	RE 612		
			RE 612A		
			Typed preliminary/interim public report (RE 603C-1 or RE 603D-1)		
25A		No	Out-of-state applicant		
25B		Yes	Certificate of status		
26		As applicable	Authorization to sign		
			Agent's authorization		