

DOCUMENT/ACTION	DATE COMPLETED
Confirm the association in good standing with the Texas Comptroller's Office	
Confirm the association in good standing with the Texas Secretary of State	
Confirm that the Registered Agent/Address is current/accurate	
Confirm Management Certificate is recorded and updated to include reference to all dedicatory instruments adopted and recorded since the last Management Certificate	
Records Production and Copying Policy*	
Records Retention Policy*	
Application of Payments Policy*	
Maintenance Responsibility Matrix*	
Guidelines as needed for particular condominium. Examples include: <ol style="list-style-type: none"> 1. Move in/move out policy 2. Pet guidelines and registration 3. Interior modifications 4. Balcony/Terrace Guidelines 	
Guidelines relating to: <ol style="list-style-type: none"> 1. Rain Barrels and Rain Harvesting Systems* 2. Solar energy devices, storm and energy efficient shingles* 3. Flags and flag poles* 4. Display of religious items* 5. Drought-resistant landscaping and water-conserving natural turf* 6. Standby electric generators* NOTE: The above guidelines are not required however we highly recommend an association adopt such in order to restrict/enforce the use of these items. (Chapter 202 of the Property Code)	
Collection Policy*	
Fining Policy*	
Social Media Policy*	
Hearing Policy in relation to fining*	
Insurance deductible policy (required under section 82.111 of the property code)	
Are there any policies, rules and regulations, or other dedicatory instruments or amendments thereto that have been adopted but are not recorded? (Section 202.006 of the Property Code requires recording of all dedicatory instruments as a condition of enforcement)	

* not required, but highly recommended

Please note that this may not be an exhaustive list of all the potential policies or guidelines that may be prudent for your community. In many cases, there may be a policy that is prudent based on the individual needs of a community that may not be mentioned here. This checklist is best utilized when a new community is engaged with the management entity, but best practices provide that annual review and consideration of the above items will ensure that the Association's corporate formalities and/or Dedicatory Instrument needs are satisfied. This checklist is provided merely as a guide and is not intended to provide legal advice. Modification of this checklist is not permitted without the express written consent of Roberts Markel Weinberg Butler Hailey PC and all rights are reserved