



New Homeowner Welcome Policy

OPERATIONS

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VERSION

1.0

EFFECTIVE

April 2026

REVIEWED

April 2026

POLICY

It is important that the homeowner's first impression of their new home and Barkan is a positive one, in addition to receiving the critical information that they need. Every new homeowner at our Associations will receive welcome documents after the closing occurs. Additionally, owners at properties with onsite management should be personally welcomed to the community whenever possible and provided with a welcome packet.

Notice of Sale

1. Resale coordinator will send a copy of the 6(d) to the AE, APM and pertinent site contacts to notify them of the sale.
2. Corporate APM should make note of the close date and verify that the closing took place.
3. If sale is confirmed, the Corporate APM should coordinate with the site staff to deliver the Welcome Letter and applicable documents. Welcome Packet Components
 1. Once AR processes the resale or "move in" in the system, a general welcome letter introducing Barkan will automatically be generated by next business day which should be incorporated into the packet.
 2. The packet will also include the portal registration letter. Owners should fill out the Owner Information Request Form available on the portal.
 3. At properties with onsite management, each Manager should ensure that the components of the New Homeowner Welcome Packet are up to date in the management software.
 4. The packet should include:
 - a. Association's emergency contact information.
 - b. A welcome letter specific to the community, including management's contact information and office hours (site or corporate).
 - c. Moving Policy
 - d. Registration forms (i.e. contact info, vehicle, pet, amenities etc.)
 - e. Information about condominium fee/assessment payments & portal log in instructions
 - f. Handbook/Rules and Regulations
 - g. Age verification at sites classified as 55+.



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- h. If applicable, any other site-specific documentation or requirements.
 - 5. The packet should be given to the new owner upon settlement or at their move in. If that's not possible, the packet must be delivered within one week of their move in.
 - 6. Managers should contact new owners to schedule an orientation. Generally, that can occur at the settlement time, on the move in day, or shortly thereafter. The orientation may include:
 - a. The Welcome Packet
 - b. Tour of the property
 - c. Introduction to other onsite staff
 - d. Additional site-specific information if applicable.