

# Standard Forms Advisory Committee Forum on Forms

- 1) **Tips on Using Ziplogix...**Nate Osollo...
  - a) Forms Tutor... - Gives help in filling out the forms
  - b) Listflash... - Brokers can instantly broadcast just-signed listings to the agents in brokerage.
  - c) ZIP CRM... - A Customer Relationship Manager within zipForms
  - d) CMS...
  - e) ZIP Community... - Allows secure sharing within zipForms
  - f) Tasks and Checklists - zipTMS
  - g) Placeholders – Allows a place to put anticipated documents – like lender letter
  - h) Transaction Tools
  
- 2) **New Forms (3)**...(June 28, 2018)
  - a) **BHAA**...Buyer Homeowner Association Advisory  
This new form advises buyers of property subject to an HOA of the importance of a thorough review of HOA documents which will govern, affect and, in some cases, limit their current and future use of the property.
  - b) **DIA**...Disclose Information Advisory  
This form provides information and instructions to assist the seller with the disclosure process. It advises sellers of the importance of disclosing what they know affecting the value and desirability of the property, and taking the time to be thorough and complete when making required statutory and contractual disclosures.
  - c) **TFHD**...Tenant Flood Hazard Disclosure  
This form satisfies the new requirement that in every residential lease or rental agreement entered into after July 1, 2018, the landlord or agent must disclose certain information regarding flood hazards including the landlord's "actual knowledge."
  
- 3) **"Global Changes"**...(June 28, 2018)
  - a) Update BRE references to DRE
  - b) Removed "Broker Review" box (*not required for Broker Supervision*)
  - c) Lock Date Field next to signature line (*prevents agent from entering date prior to signature*)
  
- 4) **Revised Forms (8)**...(June 28, 2018)
  - a) **COL**...Cancellation of Listing  
Form was modified to give broker additional options for compensation rights when agreeing to cancel a listing, including only getting compensation for certain protected buyers.
  - b) **LCA**...Lease/Rental Commission Agreement  
Form was modified so that tenants as well as landlords can agree to pay a commission.
  - c) **LL**...Lease Listing Agreement

Form was modified to be consistent with other listing forms by adding language disclosing brokers policy regarding cooperation.

d) **LR...Residential Lease or Month-to-Month Rental Agreement**

There was added language making tenant responsible for burned out light bulbs, as well as adding the required flood hazard disclosure reference. It also consolidated the statutory disclosures section into one paragraph.

e) **LRA...Application to Rent/Screening Fee**

The change distinguishes companion animals from pets. It also adds that after a credit review, landlord may inquire about the nature and length of time from a prior felony, and it provides that tenant may provide screening information and fee directly to an authorized screening service.

f) **RLAS...Residential Lease After Sale**

Consistent with the change to the Residential Lease, there is added language making tenant responsible for burned out light bulbs, adding the required flood hazard disclosure reference and reorganizing the statutory disclosures section.

g) **SBSA...Statewide Buyer and Seller Advisory**

h) As the SBSA was just revised in 2016, consistent with C.A.R. standard forms policy, these changes were not adopted in 2017. Instead a study group was created to examine similar disclosures in use throughout the State and adopt additional language or paragraphs that are applicable throughout California. The study group made various recommendations about the organization of the advisory and adding new language.

i) Additions and changes were proposed and approved by the Standard Forms Advisory Committee to the SBSA. These additions and changes include the following:

- The SBSA is now organized and grouped into seven major categories.
- There is new language on page one informing the parties that different reports may not be consistent with one another and that brokers have not verified the information in the reports, as well as advising the parties to seek legal, tax and other professional assistance;
- A table of contents was added to the second page with the various paragraphs organized into larger categories.
- New language regarding underground storage tanks (A2);
- New language regarding hiring proper professionals if square footage and boundaries are material to the buyer (A10);
- New paragraph of Accessory Dwelling Units (B1);
- New Paragraph on Buyer Intended Use of the property (B3);
- New language regarding marijuana use and California law (B10)
- New paragraph on short term rentals and rental restrictions (B14);
- New language on drones (C2);
- New language on marketing and staging and that furnishings and decorations may not be included in the sale (F5)

- A final section was created to add local disclosures and advisories.

j) **SPQ**...Seller Property Questionnaire

Two small changes to this form: clarification of question relating to Lead Based Paint Renovation Rule for work on pre-1978 property and clarifying that the Common Interest Development questions are to be answered only if applicable.

5) **Potential December 2018 New Forms...**

a) **POSA**...Pre-Occupancy Storage Agreement

This form would be used when a buyer wants to store personal property on the seller's property in advance of the close of escrow. The form will include warnings of the potential hazards of doing so.

b) **SCIQ**...Seller Common Interest Questionnaire

This form would be like a seller property questionnaire but specific to common interest developments. Seller will be asked about names of the HOA and management company, litigation, violation notices issued against the property, parking restrictions and amenities.

6) **Potential December 2018 Revised Forms...** Eleven Forms being considered...

**HOA1**...Homeowner Association Information Request (*specific questions to be answered by HOA*)

Home Owner Association Information Request will include a list of specific questions to be answered by the HOA.