



**RECREATION CENTERS OF SUN CITY WEST INC.**

**19803 R.H. Johnson Blvd. Sun City West, Arizona 85375-4498**

**Phone: 623.544.6100    Web: suncitywest.com**

**APF REFUND REQUEST**

**\*\* Please see reverse of form on qualifications for APF Refund\*\*  
\*\* Please note APF refund will not be processed without Signature\*\***

Payable To:

Date:

Mailing Address:

Owner:

Member #:

Owner:

Member #:

**DESCRIPTION**

**GL ACCOUNT #**

**AMOUNT:**

Sold Address:

40000-1021-000

\$5,200.00

Sold Date:

Purchase Address:

Purchase Date:

**Total of Refunded Check Request:    \$5,200.00**

**MUST RETURN:**

**APF REFUND REQUEST FORM and FINAL SETTLEMENT STATEMENTS ON PURCHASE AND SALE**

Request will not be processed until the above documents are received.

You may e-mail the documents to: [deeds@suncitywest.com](mailto:deeds@suncitywest.com)

I have read and understand the asset Preservation Fee Policy Statement excerpt – Fi17, 3.1 through 3.8.2 as stated on the reverse of this Refund Request Form.

Owner One Signature:

Owner Two Signature:

Date:

Date:

Approved By:

Staff:

Date:

**The complete Asset Preservation Fee Policy Statement is available for your review on**

**suncitywest.com EXCERPT TAKEN FROM POLICY STATEMENT – Fi17**

3.1 The Association imposes the Asset Preservation Fee on the acquisition, transfer or other types of change in ownership of legal or beneficial interest of the property (collectively, “purchase”) pursuant to any deed, contract for sale or other type of instrument or documentation transferring an interest in the property.

3.2 The Governing Board shall determine annually the amount of the Asset Preservation Fee as part of the Annual Financial Plan process. It will take effect with the Annual Financial Plan at the beginning of the next fiscal year.

3.3 Exemption - Purchaser of a Replacement Owner-Occupied Residential Unit:

The Association will refund the Asset Preservation Fee paid for the purchase of a Residential Unit in Sun City West if all of the following apply:

3.3.1 An Owner Member(s) has owned and occupied (primary number of the Owner Member card(s) associated with the property) a Residential Unit in Sun City West for at least one (1) year, and

3.3.2 The Owner Member(s) sells that Residential Unit within 12 months of buying a replacement owner-occupied (primary number of the Owner Member card(s) associated with property) Residential Unit in Sun City West, and

3.3.3 A tenant card has not been issued for more than three (3) months within the 12 months immediately prior to the sale of the owner-occupied (primary number of the Owner Member card(s) associated with the property) Residential Unit.

3.3.4 Ownership of the former Residential Unit hold a minimum of 50% ownership in the new Owner-Occupied (primary number of the Owner Member card(s) associated with the property) Residential Unit.

3.3.5 The Association in its sole discretion determines if the transfer qualifies, considering all factors, including ownership of multiple properties in Sun City West.

3.4 Exemption – Transfer to Foreclosing/Lender/Guarantor:

The Asset Preservation Fee shall not apply upon involuntary transfers of a Residential Unit only to the foreclosing lender or the lender’s governmental guarantor (e.g., HUD) via foreclosure sale, trustee’s sale, deed in lieu of foreclosure or similar mechanism. Any other purchaser at a foreclosure or trustee’s sale for value is not exempt.

3.5 Exemption - Death:

The Asset Preservation Fee shall not apply to any change in ownership of legal or beneficial interest resulting from death, if one of the following occurs:

3.5.1 Death of a spouse on a Joint Tenancy with Right of Survivorship deed, or death of legal title owner on a Beneficiary Deed,

3.5.2 Death of legal title owner on a Beneficiary Deed unless the beneficiary disclaims their interest pursuant to Arizona law; or

3.5.3 Deed of Distribution or similar instrument that transfers the property from a personal representative of the estate to an heir of the deceased’s estate through probate is recorded.

3.6 Other Exemptions: Exemptions for nominal or no consideration that may apply according to Arizona law (A.R.S. Section 33-442(E)) as may be amended, i.e., any conveyance between parties prescribed by A.R.S. Section 11-1134(B)(3) or (B)(7) as may be amended.

**I have read and understand the Asset Preservation Fee Policy Statement excerpt – Fi17, 3.1 through 3.8.2**

\_\_\_\_\_  
Owner One Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Owner Two Signature

\_\_\_\_\_  
Date