



Province of Alberta

CONDOMINIUM PROPERTY ACT

CONDOMINIUM PROPERTY REGULATION

Alberta Regulation 168/2000

With amendments up to and including Alberta Regulation 181/2017

Office Consolidation

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(Consolidated up to 181/2017)

ALBERTA REGULATION 168/2000

Condominium Property Act

CONDOMINIUM PROPERTY REGULATION

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Interpretation

1(1) In this Regulation,

- (a) "Act" means the *Condominium Property Act*;
- (a.1) "delivery and distribution systems" has the same meaning as in section 1(1)(m) of the *New Home Buyer Protection Act*;
- (a.2) "plan of redivision" means a condominium plan registered pursuant to section 20 of the Act;
- (b) "Registrar" means the Registrar of Land Titles.

(c) repealed AR 151/2006 s2.

(1.1) For the purposes of section 16.1(1)(b)(ii) of the Act, “as built drawing” means a document that

- (a) shows all substantial changes made in the specifications and working drawings during the construction process in respect of
 - (i) the delivery and distribution systems to which the *Safety Codes Act* applies, including electrical, gas, plumbing, heating, ventilation and air conditioning systems, and
 - (ii) any other pipes, wires, cables, chutes or ducts or other systems that provide for the passage or provision of services,

and

- (b) identifies the actual location of the systems referred to in clause (a).

(2) For the purposes of section 14(1)(b) of the Act, the following are the requirements to be met in order for a person to be a cost consultant:

- (a) in the case of an individual, that individual must be, based on reasonable and objective criteria, knowledgeable with respect to
 - (i) the costs of construction of units and common property that are the subject of section 14 of the Act, and
 - (ii) the determination as to when the construction of those units and that common property, as the case may be, is substantially completed;
- (b) in the case of a corporate entity, that corporate entity must, in carrying out the functions of a cost consultant, employ or otherwise retain the services of an individual to carry out those functions who meets the requirements provided for under clause (a);
- (c) in carrying out the functions of a cost consultant in respect of a unit or common property, a person must act at arm’s length from the developer of the unit or common property.

(3) If expressions used in this Regulation are not defined in this Regulation but are defined in the Act, those expressions have the same meanings in this Regulation as assigned to them in the Act.

(4) If expressions used in this Regulation are not defined in this Regulation or in the Act but are defined in the *Land Titles Act*, those expressions have the same meanings in this Regulation as assigned to them in the *Land Titles Act*.

AR 168/2000 s1;108/2004;151/2006;181/2017

Part 1

Registration of Condominium Plans and Other Condominium Documents

Registration of plans

2 The Registrar

- (a) must keep a register of condominium plans, and
- (b) is to record in the register particulars of all condominium plans registered pursuant to the Act.

Form of plan

3 A plan presented for registration as a condominium plan

- (a) is to be prepared in a manner acceptable to the Registrar and on a medium or a material or in a digital format approved by the Registrar, and
- (b) is to consist of
 - (i) a first sheet on which are set out the matters prescribed by sections 8(1)(a), (b), (c), (d), (f), (g), (h), (j), (l) and (m) and (2) and 10(1) of the Act, and
 - (ii) further sheets, if necessary, containing the particulars required by section 8(1)(e), (i) and (k) of the Act.

AR 168/2000 s3;108/2004

Diagrams

4 The diagrams required by section 8(1)(b) and (e) of the Act

- (a) where practical, are to be drawn with the north point directed to the top of the sheet, and
- (b) are to be to a scale that will clearly show all details and notations.

AR 168/2000 s4;108/2004

Designation of units

5(1) Subject to subsections (2) and (3), units are to be numbered consecutively commencing with unit one and terminating with a unit numbered to correspond to the total number of units comprised in the plan presented for registration as a condominium plan.

(2) In the case of a building or land that is to be developed in phases, the units in the phases, subject to section 38, are to be numbered consecutively commencing with unit one in the first phase and terminating with the last unit in the last phase.

(3) In the case of 2 or more adjacent parcels that are amalgamating,

- (a) each condominium plan that is subject to the amalgamation is to be assigned a separate letter with one condominium plan being assigned the letter "A" and each of the other condominium plans being assigned respectively the next consecutive letters, and
- (b) each unit contained in each condominium plan that is subject to the amalgamation is to retain the number assigned to that unit under that condominium plan but with the letter referred to in clause (a) that is assigned to that condominium plan following the number of the unit.

Unit factors

6 There is to be assigned to each unit a unit factor so that the total of the unit factors for all the units in the parcel is equal to 10 000.

Information to be contained in Schedule

7 For the purposes of section 8(1)(g), (h) and (j) of the Act, the Schedule to the plan is to be in Form 1 and is to set out the following:

- (a) the unit number;
- (b) the unit factor;
- (c) the basis for determining the unit factor;
- (d) the approximate floor area for each unit, in the case of a building;
- (e) the approximate ground area for each unit, in the case of land divided into bare land units.

AR 168/2000 s7;108/2004

Numbering of plan sheets

8 Each sheet of a plan presented for registration as a condominium plan is to be endorsed in the upper right-hand corner with the words, "sheet ___ of ___ sheets", with the appropriate numbers filled in.

Endorsements re redivision or consolidation

9 Before registering a condominium plan in respect of the redivision of a unit or units or the consolidation of units, the Registrar is to

- (a) endorse on the original registered condominium plan a notification of the redivision or consolidation, and
- (b) indicate on the drawings in the original registered condominium plan illustrating the unit or units being redivided or consolidated that the unit or units are being redivided or consolidated.

Additional sheets to condominium plan

10(1) The Registrar may add additional sheets to a condominium plan on which may be made any endorsement, registration, memorandum, notification or other entry that is to be or may be made on the plan.

(2) Each sheet added to a plan by the Registrar pursuant to subsection (1) is to be numbered in a manner that is acceptable to the Registrar.

Certificates of title to units

11 A certificate of title to a unit is to be in Form 2 or in any other form that the Registrar specifies.

Change in by-laws

12(1) A notice of a change in the by-laws of a corporation made pursuant to section 32 of the Act is to be in Form 3.

(2) On receipt of a notice referred to in subsection (1), the Registrar is to endorse on the condominium plan a notification containing any particulars that the Registrar directs.

AR 168/2000 s12;108/2004

Certificate given by corporation

13 A certificate given by a corporation pursuant to section 49(4) of the Act is to be in Form 4.

AR 168/2000 s13;108/2004

Instrument executed by corporation

14 On receipt of an instrument executed by a corporation pursuant to section 49, 51, 52 or 63 of the Act, the Registrar is to endorse on the condominium plan a memorandum

- (a) stating the nature of the instrument, and
 - (b) containing any particulars that the Registrar directs.
- AR 168/2000 s14;108/2004

Appointment of an administrator

15(1) Where a person is appointed as

- (a) an administrator, receiver or receiver and manager under section 14(14) of the Act, or
- (b) an administrator under section 58 of the Act,

that person must file with the Registrar a certified copy of the order of the Court under which the appointment was made.

(2) A corporation must file with the Registrar a certified copy of an order of the Court made pursuant to section 59 of the Act.

(3) On receipt of a copy of an order referred to in subsection (1) or (2), the Registrar is to endorse on the condominium plan a notification containing any particulars that the Registrar directs.

AR 168/2000 s15;108/2004

Notice of termination of plan

16(1) A notice of the termination of the condominium status of a building or parcel is to be in Form 5.

(2) On receipt of a notice referred to in subsection (1), the Registrar is to endorse on the condominium plan a notification

- (a) of the termination of the condominium status and the vesting of the parcel in the owners, and
- (b) containing any other particulars that the Registrar directs.

Certificate given by corporation

17 A certificate given by a corporation pursuant to section 52(5) or 63(4) of the Act is to be in Form 6.

AR 168/2000 s17;108/2004

Transfer of parcel

18 Where a parcel is transferred by a corporation pursuant to section 63 of the Act, the Registrar is to

- (a) enter on the relevant condominium plan a notification of the cancellation of the plan, and
- (b) indicate in an appropriate manner on any relevant plan that the condominium plan has been cancelled.

AR 168/2000 s18;108/2004

Change of address

19 The notice of change of an address required by section 73 of the Act is to be in Form 7.

AR 168/2000 s19;108/2004

Directors of corporation

20 The notices required to be filed under sections 10.1 and 28(5) of the Act are to be in Form 8.

AR 168/2000 s20;108/2004;181/2017

Part 1.3 Documents Provided to Elected Board

Documents provided to elected board

20.2 For the purposes of section 16.1 of the Act, the developer or the interim board, as the case may be, shall provide the following additional documents to a board elected under section 29 of the Act:

- (a) copies of all plans, documents and amended documents that are required to be prepared under the *Safety Codes Act* in respect of buildings on the parcel;
- (b) a copy of all outstanding orders made pursuant to the *Safety Codes Act*, *Municipal Government Act* or the *New Home Buyer Protection Act* in respect of the parcel or any buildings on the parcel;
- (c) a copy of the condominium plan and any plan of redivision;
- (d) copies of all manuals, schematic drawings, operating instructions, service guides, manufacturers' documentation, records of service and repairs and other similar information or documentation in the possession or control of the developer or interim board respecting the

- construction, installation, operation, maintenance, repair and servicing of any common property or real or personal property of the corporation;
- (e) a document setting out a list of the members of the interim board;
 - (f) a document setting out
 - (i) the following information respecting each owner:
 - (A) the name of each owner and their corresponding unit numbers, as they appear on the condominium plan;
 - (B) areas of exclusive possession, as referred to in section 50 of the Act, assigned to each owner;
 - (ii) the following information respecting each unit:
 - (A) municipal address of the unit;
 - (B) the owner's address as it appears on the certificate of title;
 - (C) any additional address for service for the unit's owner as provided by the owner to the corporation;
 - (D) unit factors for each unit;
 - (g) a document setting out a list of the names and addresses of all mortgagees who have given written notice to the corporation under section 26(3) of the Act;
 - (h) a document setting out a list of the names of each tenant that the developer or interim board has been informed of, the unit number being occupied by the tenant, and the amount of any deposit paid by the owner of a rented unit to the corporation under section 53 of the Act;
 - (i) a copy of any rules made by the board;
 - (j) a copy of any unsatisfied judgment of a court or another decision-maker in proceedings to which the corporation is a party;
 - (k) a copy of any legal or other professional advice or opinions paid for by the corporation;
 - (l) copies of any proposed budget or annual budget of the corporation, any financial statements prepared for the

corporation's current fiscal year and any financial statements in the possession or control of the developer or interim board respecting previous fiscal years;

- (m) copies of all records respecting the account maintained by the financial institution holding the reserve fund, operating funds or any other funds of the corporation;
- (n) copies of all tax records of the corporation;
- (o) a copy of each lease, licence or other instrument granting an owner the right to exclusive possession of an area under section 50 of the Act;
- (p) a copy of any restrictive covenant registered against the parcel;
- (q) a copy of all current insurance policies obtained by or on behalf of the corporation, and the certificate respecting each insurance policy;
- (r) a copy of all caveats registered against units that are owned by the corporation or intended to be transferred to the corporation.

AR 181/2017 s6

Part 1.4 Payments Held in Trust

Trustee

20.3 For the purposes of section 14 of the Act, a person or partnership that meets the following requirements is prescribed as a trustee:

- (a) the person, the professional corporation with which the person is associated or the partnership
 - (i) is an active member of the Law Society of Alberta,
 - (ii) is a holder of a permit issued under Part 8 of the *Legal Profession Act*, or
 - (iii) is comprised of partners who are active members of the Law Society of Alberta,as the case may be;
- (b) no suspension is in effect under section 63 of the *Legal Profession Act* in respect of
 - (i) the person,

- (ii) the voting shareholder of the professional corporation, or
- (iii) the partners of the partnership, with the result that no partner is permitted to operate a trust account,
as the case may be;
- (c) the person or partnership is approved to operate a trust account, under the rules established by the Law Society of Alberta under the *Legal Profession Act*;
- (d) the person or each partner of the partnership, as the case may be, is in good standing in respect of Assurance Fund requirements under section 89(4) of the *Legal Profession Act*.

AR 181/2017 s6

Notification by prescribed trustee

20.31(1) Within 10 days of receiving money to be held in trust under section 14 of the Act, a prescribed trustee shall notify the purchaser, at the purchaser's address for service, that the purchaser's deposit is held on deposit in the prescribed trustee's trust account.

(2) Nothing in this Regulation precludes a purchaser, with the developer's agreement, from retaining a prescribed trustee to hold a purchaser's deposit.

(3) A prescribed trustee retained under subsection (2) shall, within 10 days after depositing a purchaser's deposit into the prescribed trustee's trust account, notify the developer of the deposit.

AR 181/2017 s6

Release of trust money

20.32(1) A prescribed trustee shall not release money that is held in trust under section 14 of the Act except in accordance with this section.

(2) A prescribed trustee may release money held in trust to a developer where

- (a) the money is applied to the purchase price as part of the process of transferring title to the unit for which the deposit money was paid,
- (b) the money is secured by a purchaser's protection program, as defined in Part 7, that has been approved by the Minister under section 14(10) of the Act, or

- (c) the developer is entitled under section 14(12) of the Act to a reduction in the money held in trust equal to security provided under an enactment referred to in section 14(12) of the Act.
- (3)** Despite subsection (2),
- (a) a prescribed trustee shall not pay money held in trust under section 14 of the Act to a developer until after the expiry of the time period set out in section 13(1) of the Act, and
 - (b) where the certificate of title to the unit is issued in the name of the purchaser and the unit or the common property is not substantially complete, the prescribed trustee may release money held in trust to a developer only after a cost consultant provides a written opinion that the unit or the common property, as the case may be, is substantially complete.
- (4)** A prescribed trustee may release money held in trust to a purchaser where the purchase agreement is terminated after
- (a) the purchaser exercises a right of rescission under the Act or this Regulation,
 - (b) a condition imposed by the purchaser or developer has not been removed or satisfied within the time allowed by the purchase agreement, or
 - (c) the developer exercises a right of termination under the purchase agreement.
- (5)** A prescribed trustee may release money held in trust
- (a) where the parties have mutually agreed to the release,
 - (b) in accordance with a decision issued by a court ordering the payment of the money,
 - (c) where the money is required or permitted to be paid into Court, or
 - (d) subject to subsection (6), to one of the parties, where the other party has breached the purchase agreement in a way that results in a contractual right to treat the agreement as ended.
- (6)** A prescribed trustee may release money under subsection (5)(d) only if the following conditions are met:

- (a) the party alleging the breach serves a notice of the alleged breach on the other party and the prescribed trustee;
 - (b) the party served with the notice of the alleged breach does not serve a response on the alleging party and the prescribed trustee within 30 days of service of the notice of the alleged breach.
- (7) A prescribed trustee may transfer the money held in trust to another prescribed trustee.
- (8) A prescribed trustee who makes a transfer under subsection (7) shall notify the purchaser and developer of the transfer.
- (9) Where money is paid to a prescribed trustee in error, the prescribed trustee may refund the money and, after making the refund, is not subject to any other provisions under this section.

AR 181/2017 s6

Payment of trust money into Court

20.33(1) A prescribed trustee may pay money held in trust into Court in accordance with this Part and the *Alberta Rules of Court* (AR 124/2010).

- (2) Money being paid into Court must be accompanied with an affidavit made by the prescribed trustee setting out
- (a) the circumstances under which the money is paid into Court,
 - (b) the name of every person interested in or entitled to all or part of the money, together with their addresses, if known, and
 - (c) the prescribed trustee's address for service of documents.
- (3) The prescribed trustee shall give notice of the payment into Court to the developer and the purchaser.
- (4) If a person who is not the developer or the purchaser asserts a claim to money held in trust, the prescribed trustee may pay money into Court after obtaining the Court's permission to do so.
- (5) If the prescribed trustee pays money into Court under subsection (4), the prescribed trustee shall give further notice of the payment into Court as directed by the Court.

AR 181/2017 s6

Trust account records

20.34(1) For the purposes of section 14(7.1) of the Act, a prescribed trustee shall keep a complete and accurate financial

record of the following information respecting the account for each purchaser:

- (a) the name of the purchaser;
- (b) the amount of each deposit made into trust;
- (c) the date of each deposit;
- (d) the total amount of money currently held in trust;
- (e) the amount of interest earned on money held in trust;
- (f) a description of each disbursement made from money received or held in trust.

(2) For the purposes of the Act, a trustee shall keep the records required under subsection (1)

- (a) for the entire time that the purchaser's deposit money is in the trust account, and
- (b) where all of the money is paid out of the account, for at least 5 years from the date on which money is last paid out of the trust account.

(3) Nothing in this Regulation precludes

- (a) a prescribed trustee from requiring information be provided by a purchaser or a developer for the purposes of determining compliance with an enactment of Alberta or Canada,
- (b) a prescribed trustee from refusing to accept money for deposit, or
- (c) a custodian under the *Legal Profession Act* from assuming responsibilities of a prescribed trustee in accordance with an order under that Act.

AR 181/2017 s6

Part 1.5

Termination of Agreements

Agreements that cannot be terminated

20.4 For the purposes of section 17.1 of the Act, the following agreements cannot be terminated by the corporation:

- (a) easements;
- (b) restrictive covenants;

- (c) exclusive possession agreements entered pursuant to a bylaw;
- (d) mutual use agreements among corporations;
- (e) agreements for the provision of electricity or natural gas for a term of less than 5 years;
- (f) agreements respecting an alternative or renewable energy system;
- (g) agreements for the provision of telecommunication services or facilities.

AR 181/2017 s6

Part 2

Capital Replacement Reserve Fund

Definitions

21(1) In this Part,

- (a) “common property” includes common property referred to in section 14(1)(a) of the Act;
- (b) “depreciating property” means the property to which section 38(1) of the Act applies;
- (c) “qualified person” means, in respect of the depreciating property, an individual who, based on reasonable and objective criteria, is knowledgeable with respect to
 - (i) the depreciating property or that type of depreciating property,
 - (ii) the operation and maintenance of the depreciating property or that type of depreciating property, and
 - (iii) the costs of replacement of or repairs to, as the case may be, the depreciating property or that type of depreciating property;
- (d) “reserve fund” means, in respect of a corporation, the capital replacement reserve fund required to be established and maintained by the corporation under section 38 of the Act;
- (e) “reserve fund plan” means a plan prepared and approved in accordance with section 23(4) or 30(c);

- (f) “reserve fund report” means a report prepared in accordance with section 23(3) or 30(b);
- (g) “reserve fund study” means a study carried out in accordance with section 23(1) and (2) or 30(a).

(2) For the purposes of section 23, a reference to a qualified person includes a corporate entity if the corporate entity, in carrying out the functions of a qualified person, employs or otherwise retains the services of an individual who is a qualified person to carry out those functions.

AR 168/2000 s21;108/2004

Corporation as qualified person

22 Notwithstanding section 21(2), if a condominium plan consists of not more than 12 units, the corporation may, in respect of that condominium plan, carry out the functions of a qualified person if authorized to do so by a special resolution.

Reserve fund study, report and plan

23(1) The corporation must retain a qualified person to carry out a study of the depreciating property for the purposes of determining the following:

- (a) an inventory of all of the depreciating property that, under the circumstances under which that property will be or is normally used, may need to be repaired or replaced within the next 25 years;
- (b) the present condition or state of repair of the depreciating property and an estimate as to when each component of the depreciating property will need to be repaired or replaced;
- (c) the estimated costs of repairs to or replacement of the depreciating property using as a basis for that estimate costs that are not less than the costs existing at the time that the reserve fund report is prepared;
- (d) the life expectancy of each component of the depreciating property once that property has been repaired or replaced.

(2) In carrying out the reserve fund study under subsection (1), the qualified person must also do the following:

- (a) determine the current amount of funds, if any, included in the corporation’s reserve fund;

- (b) recommend the amount of funds, if any, that should be included in or added to the corporation's reserve fund in order to provide the necessary funds to establish and maintain or to maintain, as the case may be, a reserve fund for the purposes of section 38 of the Act;
- (c) describe the basis for determining
 - (i) the amount of the funds under clause (a), and
 - (ii) the amount in respect of which the recommendation was made under clause (b).

(3) On completing the reserve fund study under this section, the person who carried out the study must prepare and submit to the board a reserve fund report in writing in respect of the study setting out the following:

- (a) the qualifications of that person to carry out the reserve fund study and prepare the report;
- (b) whether or not the person is an employee or agent of or otherwise associated with the corporation or any person who performs management or maintenance services for the corporation;
- (c) the findings of the reserve fund study in respect of the matters referred to in subsections (1) and (2);
- (d) any other matters that the person considers relevant.

(4) On receiving the reserve fund report under subsection (3), the board must, after reviewing the reserve fund report, approve a reserve fund plan

- (a) under which a reserve fund is to be established, if one has not already been established, and
- (b) setting forth the method of and amounts needed for funding and maintaining the reserve fund.

(5) A reserve fund plan approved under subsection (4) must provide that, based on the reserve fund report, sufficient funds will be available by means of owners' contributions, or any other method that is reasonable in the circumstances, to repair or replace, as the case may be, the depreciating property in accordance with the reserve fund report.

(6) Notwithstanding that a reserve fund plan has been approved under subsection (4), the corporation must provide to the owners for the owners' information copies of that approved reserve fund plan prior to the collection of any funds for the purposes of those

matters dealt with in the reserve fund report on which the approved reserve fund plan was based and that are to be carried out pursuant that report.

(7) Until such time that a corporation has approved a reserve fund plan under subsection (4) and has met the requirement under subsection (6) so as to be eligible to collect funds in respect of the reserve fund, the corporation may, notwithstanding subsection (6), collect or otherwise receive funds for a fund that is similar in nature to a reserve fund and may make expenditures from and generally continue to operate that fund.

AR 168/2000 s23;108/2004;181/2017

When reserve fund study, report and plan must be prepared

24 The corporation must meet the requirements of section 23(1) to (6) no later than 2 years after the date on which the condominium plan is registered.

AR 168/2000 s24;181/2017

Exemption from reserve fund study, report and plan re rental units

25 The corporation is exempted from retaining a qualified person to preparing a reserve fund study and from establishing or maintaining a reserve fund if

- (a) the certificate of title to each of the units included in a condominium plan is registered in the name of the same owner or the same group of owners, and
- (b) those units are rented or offered for rent to persons as tenants who are not purchasers and are not intended to be purchasers.

AR 168/2000 s25;181/2017

When study, report and plan must be prepared re conversions, etc.

26(1) Notwithstanding sections 24 and 25, if the owner

- (a) of premises to which section 21 of the Act applies offers those premises for sale, or
- (b) of units to which section 25 applies offers those units for sale and if as a result of the sale of any of those units section 25 would no longer apply in respect of those units,

the owner shall not sell any of those premises or units until

- (c) a reserve fund study is carried out and a reserve fund report is prepared in accordance with section 23, and
- (d) a reserve fund plan is prepared in accordance with section 23.

(2) The reserve fund report and the reserve fund plan referred to in subsection (1) must be made available for inspection by any person purchasing a unit referred to in subsection (1).

AR 168/2000 s26;108/2004

Maintenance of reserve fund

27(1) A corporation must maintain the funding of its reserve fund at an appropriate amount or in an appropriate state so that the requirements of section 38 of the Act continue to be met.

(2) Except for the purposes of paying for repairs to or replacement of depreciating property, neither a corporation nor any person holding money or dealing with money on behalf of the corporation is to commingle any funds that make up the corporation's reserve fund with the corporation's operating funds or any funds of any other corporation or other entity.

(3) Neither a corporation nor any person holding money or dealing with money on behalf of the corporation is to commingle any funds that make up the corporation's reserve fund with the funds that make up any other corporation's reserve fund.

AR 168/2000 s27;108/2004

Repairs, etc. not to be construed as capital improvements

28 For the purposes of this Part and section 38 of the Act, a repair to or replacement of depreciating property that is carried out by a corporation is not to be construed as a capital improvement if that repair or improvement is a matter that was included in the current reserve fund report that was prepared and submitted to the corporation.

AR 168/2000 s28;108/2004

Annual report

29(1) The corporation must prepare an annual report for each fiscal year respecting the reserve fund setting out at least the following:

- (a) the amount of the reserve fund as of the last day of the immediately preceding fiscal year;
- (b) all the payments made into and out of the reserve fund for that year and the sources and uses of those payments;

- (c) a list of the depreciating property that was repaired or replaced during that year and the costs incurred in respect of the repair or replacement of that property.

(2) The annual report prepared under subsection (1) must be made available by the corporation to the owners for the owners' information before or at the time that the notice of the next annual general meeting of the corporation is provided to the owners.

AR 168/2000 s29;181/2017

5-year review

30 At the conclusion of 5 years from the day that the most recent reserve fund plan was approved, the corporation must, in accordance with the same procedures, requirements and restrictions to which section 23 is subject,

- (a) carry out a reserve fund study,
- (b) prepare a reserve fund report,
- (c) approve the reserve fund plan, and
- (d) provide to the owners for the owners' information copies of the approved reserve fund plan referred to in clause (c) prior to the collection of any funds for the purposes of those matters dealt with in the reserve fund report referred to in clause (b) and that are to be carried out pursuant that report.

Access to reserve fund plan and annual reports

31(1) Notwithstanding that

- (a) the most recent reserve fund report,
- (b) the most recent reserve fund plan, or
- (c) the most recent annual report prepared under section 29

has been provided to the owners under this Regulation, the corporation, on the written request of an owner, must, within 10 days from the day of receipt of the written request, provide to that owner a copy of that reserve fund report, reserve fund plan or annual report, or any one or more of them, as requested by the owner.

(2) On the written request of a purchaser or a mortgagee of a unit, the corporation must, within 10 days from the day of receipt of the written request, provide to the person making the request a copy of

- (a) the most recent reserve fund report,
- (b) the most recent reserve fund plan, and
- (c) the most recent annual report prepared under section 29.

Part 2.1 Investments

Authorized investments

31.1 The investments in which a corporation may invest funds not immediately required by it in accordance with section 43 of the Act are those authorized in Schedule 2 to this Regulation.

AR 151/2006 s3;181/2017

Part 3 Phased Development

Application of Part

32 This Part applies with respect to a building or land that is to be developed in phases under section 19 of the Act.

AR 168/2000 s32;108/2004

Developments not included under this Part

33(1) In this section, “common property” means common property as defined in section 14(1)(a) of the Act.

(2) Nothing in this Part is to be construed so as to apply with respect to the development of a building or land in respect of a condominium plan under which

- (a) bare land units or other units are redivided or modified pursuant to section 20 of the Act or Part 5, or
- (b) an amalgamation of adjacent parcels is carried out pursuant to Part 4,

whether or not in the process common property is created.

AR 168/2000 s33;108/2004

Existing building and land

34 A building or land is not eligible to be developed in phases under this Part if the building or land is included in a condominium plan that does not meet the requirements of section 35.

Phased development disclosure statement

35(1) Where a plan is registered as a condominium plan under which a building or land is to be developed in phases under this Part, the plan, at the time when it is registered with respect to the initial phase, must be accompanied by a phased development disclosure statement that is registered as part of the condominium plan and that sets out at least the following:

- (a) a statement that the building or land is to be developed in phases;
- (b) the maximum number of units to be included in the entire completed phased project;
- (c) the minimum number of units to be included in the entire completed phased project;
- (d) a description of the units and common property included in the initial phase;
- (e) a description of the units and common property to be included in each of the subsequent phases, including
 - (i) the number of units or the minimum and maximum number of units that are to be included in each of those phases;
 - (ii) the general size of each of the units that are to be included in each of those phases;
 - (iii) the extent of the common property and a description of the improvements to that common property that are to be included in each of those phases;
 - (iv) any restrictions or qualifications on the types of units and common property that are to be included in each of those phases;
 - (v) a general description of the proposed usage of the units and the common property that are to be included in each of those phases;
- (f) a description of the proposed physical appearance of each phase and the architectural compatibility of the phases with each other and the project as a whole;
- (g) if common property in a subsequent phase is to be available for the use of the owners in the previous phases, an explanation as to when those facilities will be completed and available to those owners;

- (h) the extent to which the developer will contribute to the common expenses respecting the building and land during the development and sale of each phase and on the completion and sale of the entire phased project;
 - (i) the method used to determine the allocation or distribution of administrative expenses with respect to all of the units in each separate phase and for all of the units in the entire completed project;
 - (j) the basis for allocating unit factors in the phased development, which must be consistent for each phase and the entire phased project;
 - (k) the effect on the owners' contributions for administrative expenses and the corporation's budget if one or more, as the case may be, of the future phases are not proceeded with;
 - (l) a certificate of the developer in Form 9 certifying that the phased development disclosure statement complies with the Act and the regulations and all the requirements under the Act and the regulations.
- (2)** Once a phased development disclosure statement is registered, that phased development disclosure statement is not to be changed by the developer without the consent of at least 2/3 of the persons, not including the developer, who are entitled under the Act to vote.
- (3)** Where a building or land is being developed in phases, the development must be in accordance with the phased development disclosure statement.
- (4)** Notwithstanding subsection (2) or (3), to the extent that the development of a building or land in phases, as provided for under a registered phased development disclosure statement, does not comply with the current development scheme, development control by-law, zoning by-law, land use by-law or any other municipal requirement applicable to that development, the developer may
- (a) change the development to the extent necessary so that the development complies with the current scheme, by-law or other municipal requirement, and
 - (b) change the phased development disclosure statement to reflect the change referred to in clause (a).
- (5)** Where a phased development disclosure statement is to be changed under subsection (2) or (4),

- (a) the change does not become effective until the change is registered, and
- (b) the Registrar, on being presented with a certificate of the developer in Form 10, is to amend the phased development disclosure statement to reflect the change.

Completion of project

36(1) Where a condominium plan indicates that a building or land may be developed in phases, all the phases that make up the total development of the building or land in phases must be registered

- (a) within the period of time specified in the phased development disclosure statement, or
- (b) if the phased development disclosure statement does not specify the period of time within which all the phases that make up the total development are to be registered, within 6 years from the day that the condominium plan was registered.

(2) Notwithstanding subsection (1), the developer may, with the agreement of at least 2/3 of the persons, not including the developer, who are entitled under the Act to vote, extend or reduce the period of time referred to in subsection (1).

(3) If

- (a) a building or land is to be developed in phases,
- (b) one or more phases have been registered, and
- (c) the developer does not proceed, or does not intend to proceed, with one or more of the other phases that were to be part of the development,

the developer must in writing notify the corporation and the owners that the phase or phases will not be proceeding.

(4) If

- (a) a building or land is to be developed in phases, and
- (b) within the time period referred to in subsection (1) or (2), all the phases that make up the total development are not registered,

the developer, unless the corporation otherwise agrees, is deemed to have given written notice to the corporation and the owners that the phase or phases will not be proceeding.

(5) If

- (a) under a condominium plan a building or land is to be developed in phases and
 - (i) in accordance with the phased development disclosure statement, or
 - (ii) under an agreement between the developer and the corporation

the developer is to transfer facilities and property intended for common use to the corporation after the registration of one or more phases, and

- (b) within the time provided for in the phased development disclosure statement or the agreement or, if the time is not so provided for, within a reasonable time the developer fails to meet the requirement to transfer the facilities and property intended for common use to the corporation,

an owner, the corporation or an interested party may bring an action for an order of the Court directing the developer to carry out that requirement or for damages arising out of the developer's failure to carry out that requirement.

(6) If

- (a) after the registration of one or more phases in respect of a building or land that is being developed in phases the developer elects not to or fails to proceed with one or more other phases that were to have been included in the development, and
- (b) common property that was to have been made available for the use of the owners in the registered phases was to have been included in the phases that are not being proceeded with,

either the developer, the corporation or an interested party may apply to the Court for an order giving directions

- (c) as to how the common property may be made available under the existing circumstances, and
- (d) with respect to the provision of that common property, as to the application of any funds arising from a bond, a letter of credit or other security that has been provided to secure the provision of that common property.

(7) If

- (a) after the registration of one or more phases in respect of a building or land that is being developed in phases the developer elects not to or fails to proceed with one or more other phases that were to have been included in the development, and
- (b) land, on which the phases not being proceeded with were to have been located, remains part of the condominium plan,

the developer, the corporation or an interested party may apply to the Court for an order removing the unused land from under the condominium plan.

(8) In considering an application under subsection (7), the Court may

- (a) refuse to grant the order with respect to the land or a portion of that land that is the subject of the application where the Court is satisfied that the land or that portion of the land is required for the purposes of properly finishing or otherwise completing the building or land that is included in the phases that are registered;
- (b) where the Court is satisfied that the land or any portion of that land that is the subject of the application is not required for the purposes of properly finishing or otherwise completing the building or land that is included in the phases that are registered, give directions directing that that land or that portion of the land be removed from under the condominium plan;
- (c) where the Court is satisfied that the land or any portion of that land that is the subject of the application is required for the purposes of properly finishing or otherwise completing the building or land that is included in the phases that are registered, give directions respecting the vesting of the title of that land or a portion of that land in the name of the corporation or the owners of the units;
- (d) give any directions that the Court considers appropriate respecting the transfer of any land that is the subject of the application, the vesting of ownership in that land, the issuance, cancellation or modification of any certificate of title to that land, the reallocation of unit factors and any other matter relating to the transaction.

Court order terminating development

37 Notwithstanding anything in section 36, where a building or land is to be developed in phases and

- (a) the developer, before all the phases that make up the total development are registered or are otherwise completed, is assigned into bankruptcy, is adjudged bankrupt or has a receiver of its assets appointed, or
- (b) the developer is unable or unwilling to register or otherwise complete the project as required under this Part or in accordance with the phased development disclosure statement,

the developer, the corporation or an interested party may apply to the Court for an order terminating the development and giving directions or a determination in respect of any matter arising out of the termination of the development.

Registration of condominium plan

38(1) Where a plan is to be registered as a condominium plan under which a building or land is to be developed in phases, the Registrar, on registering the plan, must, in accordance with sections 5 and 6 of the Act,

- (a) in the case of the initial phase or phases that are included in the initial registration of the plan, issue, in respect of the building or land included in that phase or those phases, certificates of title for the units, and
- (b) in the case of the remainder of the parcel that is not included in the registered phase or phases referred to in clause (a), issue, in respect of the parcel that is not included in the registered phase or phases, one or more certificates of title for bare land units.

(2) A plan presented for registration as a condominium plan must, with respect to the building or land that is included in the registered phase or phases for which certificates of title are to be issued under sections 5 and 6 of the Act, meet the requirements of sections 8 to 10 of the Act.

AR 168/2000 s38;108/2004

Amendment to plan re subsequent phase

39(1) With respect to the registration of a subsequent phase, on presentation to the Registrar of the appropriate documentation to amend the condominium plan to include a subsequent phase, the Registrar is to amend the condominium plan so that the units, the common property and any reallocation of unit factors that are the subject of the amendment are consolidated with the existing registered phases.

(2) An amendment to a condominium plan presented for registration under this section must, with respect to the building or land that is the subject of that amendment, meet the requirements of sections 8 to 10 of the Act.

(3) On registering an amendment to a condominium plan under this section, the Registrar is to

- (a) cancel the certificates of title to the bare land units that were issued under section 38(1)(b) for the real property that is now to be included in the building or land that is the subject of that amendment, and
- (b) issue new certificates of title in accordance with sections 5 and 6 of the Act with respect to the units that are included in the building or land that is the subject of that amendment.

AR 168/2000 s39;108/2004

Restrictions on registration

40 Where an amendment is to be registered amending a condominium plan to consolidate into the plan a subsequent phase, the Registrar is not to register any documentation under which certificates of title are to be issued in respect of that subsequent phase until the Registrar is provided with a certificate of the developer in Form 11 certifying that the amendment meets the criteria as set out in the phased development disclosure statement.

Common property re amendment to plan

41 On the registration of an amendment to a condominium plan under section 39, the common property included in that amendment becomes common property for all of the phases that have been registered and the common property in the previously registered phases becomes common property for the phase for which the amendment was registered.

Operation of phases under the Act

42 The development in phases of a building or land under a condominium plan must be carried out in a manner that,

- (a) on the registration of the first phase, enables that phase to function and operate under the Act in the same manner as if all the units and common property included in that phase were the only units and common property that were going to be included in that condominium plan, and
- (b) on the registration of each subsequent phase, enables the most recently registered subsequent phase and the

previously registered phases to function and operate under the Act in the same manner as if all the units and common property included in the registered phases were the only units and common property that were going to be included in that condominium plan.

Sale of units

43 Where a building or land is to be developed in phases, a developer, in addition to providing to a purchaser the information required under section 12 of the Act, must also provide to the purchaser a copy of the phased development disclosure statement referred to in section 35.

AR 168/2000 s43;108/2004;181/2017

Convening of meeting and election of board

44 With respect to convening a meeting of the corporation for the purpose of electing a board, on the registration of a condominium plan under which a building or land is developed in phases, section 29 of the Act applies to the first phase in the same manner as if that phase contained the only units and common property that are to be included in the condominium plan.

AR 168/2000 s44;108/2004

Easements

45(1) Where an easement is registered against a condominium plan under which a building or land is being developed in phases, that easement is deemed to be also registered against the certificate of title for

- (a) each unit then existing, and
- (b) each unit subsequently created when an amendment to the condominium plan is registered for the purpose of consolidating a subsequent phase into the condominium plan.

(2) Notwithstanding subsection (1), if an easement is registered against a certificate of title of a unit and that easement does not affect the unit, the Registrar may, on being satisfied that such is in fact the case, discharge the easement from that certificate of title and endorse the easement on the condominium plan.

Part 4 Amalgamation

Definitions

46 In this Part,

- (a) “adjacent parcel” means 2 or more parcels that are adjoining or are separated only by
 - (i) a highway as defined in the *Traffic Safety Act* or the successor to that Act,
 - (ii) a right of way for a pipeline,
 - (iii) a right of way for a public utility as defined in section 1 of the *Municipal Government Act*,
 - (iv) a right of way for a railway, or
 - (v) 2 or more highways and rights of way referred to in subclauses (i) to (iv);
- (b) “amalgamated condominium plan” means the condominium plan created out of the amalgamation of 2 or more condominium plans;
- (c) “amalgamated corporation” means the corporation created out of the amalgamation of 2 or more corporations;
- (d) “amalgamated parcel” means the parcel created out of the amalgamation of 2 or more parcels;
- (e) “amalgamating condominium plan” means a condominium plan that is amalgamated, or is proposed to be amalgamated, with one or more other condominium plans to create an amalgamated condominium plan;
- (f) “amalgamating corporation” means a corporation that is amalgamated, or is proposed to be amalgamated, with one or more other corporations to create an amalgamated corporation;
- (g) “amalgamating parcel” means a parcel that is amalgamated, or is proposed to be amalgamated, with one or more other parcels to create an amalgamated parcel.

AR 168/2000 s46;221/2004

Authority to amalgamate

47(1) Two or more adjacent parcels that are the subject of condominium plans may, in accordance with this Part, be amalgamated so that the amalgamating parcels become one amalgamated parcel.

(2) Where 2 or more adjacent parcels are amalgamated, the condominium plans registered and the corporations existing in respect of each of those amalgamating parcels are, in accordance with this Part, amalgamated so that

- (a) the amalgamating condominium plans become one amalgamated condominium plan, and
- (b) the amalgamating corporations become one amalgamated corporation.

Pre-amalgamation meeting

48(1) Where it is proposed that 2 or more adjacent parcels be amalgamated, each amalgamating corporation shall convene a meeting of its owners for the purpose of presenting to the owners the proposal respecting the amalgamation of the parcels.

(2) A notice of a meeting convened under this section must, at least 30 days before the day on which the meeting is to be held, be given to

- (a) all the owners, and
- (b) all registered mortgagees.

Amalgamation disclosure statement

49 Prior to or at the time of giving notice of a meeting under section 48, the corporation must provide to the persons entitled to notice under section 48 a copy of an amalgamation disclosure statement setting out at least the following:

- (a) a description of the proposed amalgamated parcel;
- (b) a plan that sets out the location of buildings, structures, roadways, walkways, parking areas, pools, patios and similar items located on the proposed amalgamated parcel;
- (c) the method of selection of the board as provided for under the proposed by-laws;
- (d) the proposed amalgamated condominium plan;
- (d.1) a description of the proposed managed property, if any, as provided for under the proposed bylaws;
- (e) the current financial statement of each of the amalgamating corporations, including the assets and liabilities of the amalgamating corporations;
- (f) the proposed reallocation of unit factors;
- (g) the reserve funds of each of the amalgamating corporations;

- (h) the proposed amount of the reserve fund of the proposed amalgamated corporation;
- (i) the proposed by-laws of the proposed amalgamated corporation;
- (j) the proposed new contributions, if any, that are to be levied
 - (i) for the administrative expenses, and
 - (ii) for the reserve fund as defined in section 21(1)(d),of the proposed amalgamated corporation.

AR 168/2000 s49;181/2017

Resolutions of the owners

50(1) An amalgamation of parcels is not to take place unless a special resolution of each corporation is in force

- (a) approving the amalgamation of the parcels, and
- (b) approving the proposed by-laws of the proposed amalgamated corporation.

(2) A special resolution referred to in subsection (1) may include any terms or conditions respecting the amalgamation

- (a) that must be met before the amalgamation may proceed, or
- (b) to which the amalgamation is subject.

(3) Where 2 or more amalgamating corporations pass special resolutions referred to in subsection (1), the special resolutions are inoperative unless the proposed by-laws approved by each of the special resolutions are identical.

Registration

51(1) In order for an amalgamation of adjacent parcels to be registered, the Registrar must be provided with

- (a) the documents, properly executed, setting out the special resolutions passed in respect of each of the amalgamating parcels,
- (b) a plan showing the amalgamation of the amalgamating condominium plans, and
- (c) the by-laws referred to in section 50(1)(b).

- (2)** The plan referred to in subsection (1)(b) must
- (a) set out the amalgamating condominium plans;
 - (b) show the numbering and location of the units in relation to each other and the common property;
 - (c) include a table setting out
 - (i) the old unit numbers and the new unit numbers,
 - (ii) the unit factors, and
 - (iii) the floor or ground area of the units;
 - (d) set out the method by which the unit factors were calculated;
 - (e) set out the address for service of the amalgamated corporation;
 - (f) contain an acknowledgment by each of the amalgamating corporations that the information contained in the plan is accurate;
 - (g) set out the name of the person who prepared the plan;
 - (h) set out any other information as may be required by the Registrar.
- (3)** On the registration of the documents referred to in subsection (1), the Registrar
- (a) must register a new amalgamated condominium plan that is comprised of the amalgamating condominium plans;
 - (b) must issue a new condominium plan number for the amalgamated corporation;
 - (c) must cancel the amalgamating condominium plans;
 - (d) must cancel the existing certificate of title of each of the owners and issue in the name of the owner a new certificate of title that
 - (i) sets out the new unit factors applicable to that unit, and
 - (ii) is subject to the encumbrances that were registered against the certificate of title that was cancelled;

- (e) may add additional sheets to the amalgamated condominium plan in order to contain the information relating to the amalgamated condominium plan;
 - (f) may make on the amalgamating condominium plans and amalgamated condominium plan whatever notations that are required in the opinion of the Registrar to give effect to the amalgamation.
- (4) On the registration of the documents referred to in subsection (1),
- (a) the amalgamating parcels are amalgamated into one amalgamated parcel,
 - (b) the amalgamating condominium plans are amalgamated into one amalgamated condominium plan,
 - (c) the amalgamating corporations are amalgamated into one amalgamated corporation under the name “Condominium Corporation No. ___”, and
 - (d) the proposed by-laws referred to in section 50(1)(b) become the by-laws of the amalgamated corporation.

Amalgamated corporation

52(1) On the amalgamation of the amalgamating corporations into an amalgamated corporation,

- (a) the boards of the amalgamating corporations cease to exist, and
- (b) the persons who were the members of the boards of the amalgamating corporations become the temporary board of the amalgamated corporation.

(2) The temporary board holds office until a meeting of the amalgamated corporation is convened and a board is elected.

AR 168/2000 s52;181/2017

Notification of amalgamation

53 On the amalgamation of 2 or more amalgamating parcels into an amalgamated parcel, the amalgamated corporation must notify the following persons of the amalgamation:

- (a) all the owners;
- (b) all the insurers who were insurers of the amalgamating corporations;

- (c) all the creditors of the amalgamating corporations;
- (d) all the mortgagees who have mortgages registered against the certificates of title to the units;
- (e) the municipal authority within which the amalgamating parcels are located.

Meeting of corporation

54 Within 6 months from the day that the Registrar registers the amalgamation of 2 or more amalgamating parcels, the amalgamated corporation must, for the purpose of electing a board, convene a meeting of the persons who are entitled under the Act to vote.

Capital replacement reserve fund

55 For the purposes of Part 2,

- (a) where, with respect to an amalgamated corporation, one or more of the amalgamating corporations existed immediately before September 1, 2000, the amalgamated corporation is considered to be a corporation that came into existence before September 1, 2000, or
- (b) where, with respect to an amalgamated corporation, none of the amalgamating corporations existed before September 1, 2000, the amalgamated corporation is considered to be a corporation that came into existence on or after September 1, 2000.

Assumption of obligations

56 On the amalgamation of 2 or more amalgamating corporations, the amalgamated corporation

- (a) assumes all the obligations, rights and property of the amalgamating corporations, and
- (b) becomes a party to any legal proceeding in existence at the time of the amalgamation to which an amalgamating corporation was a party.

Part 5 Modification of Condominium Plans

Application of Part

57(1) This Part applies to a modification of a condominium plan provided for under section 20(2) of the Act.

(2) A reference in this Part to a plan of consolidation is a reference to a plan of redivision under section 20 of the Act under which 2 or more units are consolidated into one consolidated unit.

AR 168/2000 s57;108/2004

Notification of consolidation of units

58(1) The owners who wish to consolidate 2 or more units into one consolidated unit must

- (a) give notice of the proposed consolidation to the board and to the holders of any interests registered against the certificates of title to the units,
- (b) provide to the board any documentation and information that the board may reasonably request that relates to the proposed consolidation,
- (c) if the external boundaries of the proposed consolidated unit are to be different than the external boundaries of the existing units that are being consolidated as shown on the existing condominium plan, provide to the board a plan of consolidation provided by a land surveyor setting out the location of the external boundaries of the proposed consolidated unit,
- (d) provide to the board all the appropriate consolidation documents and approvals, and
- (e) obtain the approval of the board for the consolidation.

(2) For the purposes of this section,

- (a) a reference to the external boundaries of the existing units is a reference to the external boundaries other than those portions of those boundaries that will, on the consolidation taking place, be contained entirely within the consolidated unit, and
- (b) a reference to a land surveyor is a reference to a person referred to in section 10(1)(b)(i) of the Act.

AR 168/2000 s58;108/2004

Common property

59 If common property is affected by the consolidation of the units, section 49 of the Act applies in respect of the consolidation of the units insofar as the consolidation affects the common property.

AR 168/2000 s59;108/2004

Registration of consolidation**60(1)** On the registration

- (a) of a certificate in Form 12 indicating the board's approval of the consolidation of the units, and
- (b) where required under section 58, of the plan of consolidation referred to in section 58(1)(c),

the Registrar is to amend the condominium plan so that the units are consolidated into one unit.

(2) Notwithstanding subsection (1), the Registrar shall not amend a condominium plan unless any encumbrances registered against the certificates of title to the units that are the subject of the consolidation are identical or the holder of each encumbrance has given a consent to the consolidation.

Part 6 Insurance

Perils to be insured against

61(1) For the purposes of section 47(1)(a), (b) and (c) of the Act, a corporation must place and maintain insurance against the following perils:

- (a) fire;
- (b) leakage from fire protective equipment;
- (c) lightning;
- (d) smoke;
- (e) windstorm;
- (f) hail;
- (g) explosion of natural, coal or manufactured gas;
- (h) water damage caused by flood;
- (i) water damage caused by sewer back-up or the sudden and accidental escape of water or steam from within a plumbing, heating, sprinkler or air conditioning system or a domestic appliance that is located within an insured building;
- (j) impact by aircraft, spacecraft, watercraft and land vehicles;

- (k) riot, vandalism or malicious acts;
- (l) any other perils as required in the by-laws.

(2) Notwithstanding subsection (1), in respect of a bare land unit, a corporation is, unless the by-laws provide otherwise, required to place and maintain insurance against only those perils referred to in subsection (1)

- (a) to which the bare land unit may be at risk, or
- (b) to which the property for which the corporation is responsible may be at risk.

(3) Notwithstanding subsection (1)(h), for the purposes of section 47(1)(a), (b) and (c) of the Act the peril referred to in subsection (1)(h) is excluded where coverage against that peril is not available for the property being insured.

(4) The perils referred to in subsection (1)(a) to (k) refer to those perils covered by standard insurance policies and as customarily understood in the insurance industry.

(5) The insurance coverage referred to in section 47(7) of the Act and the extent or amount of liability and the perils to be insured against under section 47(7) of the Act are subject to any limitation, exception, exclusion or restriction that

- (a) is usual and customarily imposed or provided for in the insurance industry, or
- (b) is reasonable in the circumstances,

as may from time to time be imposed or otherwise provided for by the insurer.

(6) For the purposes of the Act and this Regulation, insurance placed by a corporation is not to be considered inadequate by reason only that the insurance is subject to any limitation, exception, exclusion or restriction that

- (a) is usual and customarily imposed or provided for in the insurance industry, or
- (b) is reasonable in the circumstances,

as may from time to time be imposed or otherwise provided for by the insurer.

AR 168/2000 s61;23/2001;108/2004

Amount of insurance

62 Property that is insured as required pursuant to section 47 of the Act must be insured for replacement value subject to any reasonable deductible that is agreed to by the board and the insurer.

AR 168/2000 s62;108/2004

Part 7

Purchaser's Protection Programs

Definitions

63 In this Part,

- (a) "common property" means common property to which section 14 of the Act applies;
- (b) "cost consultant" means a cost consultant referred to in section 14(1)(b) of the Act;
- (c) "program provider" means a person who operates a purchaser's protection program;
- (d) "purchaser's protection program" means a plan, agreement, scheme or arrangement that meets the requirements referred to in section 67.

AR 168/2000 s63;108/2004

Application of Part

64(1) This Part applies only to loss by a purchaser resulting from a developer's failure to complete the construction of units and the related common property or either of them.

(2) Nothing in this Part is to be construed so as to limit or restrict the rights of a purchaser under a purchase agreement or that the purchaser otherwise has at law.

Approval of Minister

65 The Minister will only consider a purchaser's protection program for approval under section 14(10) of the Act if that program meets the requirements of this Part.

AR 168/2000 s65;108/2004

Purchaser's protection program having general application

66(1) Once a purchaser's protection program that is intended to be of general application is approved by the Minister, any developer who comes under that program may apply that program in respect of any of that developer's property that is governed by the Act if that property is enrolled in that program.

(2) Notwithstanding subsection (1), if after a purchaser's protection program is approved by the Minister a significant change is to be made to that program, that change must be approved by the Minister under section 14(10) of the Act before it is incorporated into that program.

(3) A purchaser's protection program referred to in subsection (1) is not to be applied in respect of any property that is governed by the Act until there has been published in Part I of The Alberta Gazette

(a) a notice summarizing the terms and conditions of the program, and

(b) a notice of the approval of the program by the Minister.

AR 168/2000 s66;108/2004

Requirements of a purchaser's protection program

67(1) In this section, "purchase money" means all or any portion of the money paid to a developer by a purchaser for the purchase of a unit.

(2) In order to qualify as a purchaser's protection program that may be approved by the Minister under section 14(10) of the Act, the program must be

(a) a plan, agreement, scheme or arrangement that,

(i) in respect of a unit being purchased, provides for the receipt, handling and disbursement of the purchase money and under which the money is to be paid to and held by a third party and is to be disbursed by that third party to the developer, based on the progress of construction of the unit and the related common property as determined by a cost consultant, and

(ii) provides for the refund to the purchaser of undisbursed purchase money in the event of the developer's failure to complete the construction of the unit or the related common property or both,

(b) a plan, agreement, scheme or arrangement that provides for an indemnity under which the program provider agrees to indemnify a purchaser of a unit against the loss of the purchaser's money, where that loss is incurred as a result of the developer's failure to complete the construction of the unit or the related common property or both, or

- (c) a plan, agreement, scheme or arrangement that provides for the program provider, at the option of the program provider, to either
 - (i) refund to the purchaser of a unit the purchase money, where the purchaser suffers loss as a result of the developer's failure to complete the construction of the unit or the related common property or both in accordance with the purchase agreement, or
 - (ii) complete the unit and its proportionate share of the related common property in accordance with the purchase agreement where the unit and the related common property have not been completed as a result of the developer's failure to complete the construction of the unit or the related common property or both in accordance with the purchase agreement.

(3) A purchaser's protection program referred to in subsection (2) is subject to the terms, conditions, exceptions, exclusions and limitations approved by the Minister as set out in the certificate issued under section 69.

AR 168/2000 s67;108/2004

Form of purchaser's protection program

68 A purchaser's protection program may be in the form of a warranty program, an irrevocable letter of credit, a performance bond, a bond or a similar financial instrument issued by a financial institution, insurance company or a program provider, as the case may be.

Certificate of sponsor

69(1) A purchaser's protection program must provide that where a purchaser enters into a purchase agreement with a developer for the purchase of a unit, the program provider must, subject to subsection (2), provide to the purchaser a certificate setting out at least the following:

- (a) that the purchaser's protection program, together with any amendments to it, has been approved by the Minister in accordance with the Act and this Regulation;
- (b) the name and address of the program provider;
- (c) that the developer is enrolled under the program;
- (d) that the property being purchased is enrolled in the program;

- (e) the date on which the benefits provided for under the program take effect;
- (f) the date on which the benefits provided for under the program terminate or the method by which that date is fixed or is to be fixed;
- (g) in the case of a purchaser's protection program of the type referred to in section 67(2)(a),
 - (i) the name of the party responsible for the receipt, handling and disbursement of the money,
 - (ii) the terms and conditions governing the receipt, handling and disbursement of the money, and
 - (iii) any exceptions or exclusions that would limit the liability of the sponsor, including, without restriction, any monetary limits or time limits;
- (h) in the case of a purchaser's protection program of the type referred to in section 67(2)(b) or (c),
 - (i) the circumstances under which the purchaser's protection program may be relied on, and
 - (ii) any exceptions or exclusions that would restrict a purchaser's ability to rely on the purchaser's protection program, including, without restriction, any monetary limits or time limits.

(2) A program provider must provide a certificate under subsection (1) to a purchaser forthwith after the program provider has been notified that the purchase agreement has been entered into.

Part 8

Amendment of Condominium Plans

To be amended in accordance with this Part

70 Except as otherwise provided for under the Act or this Regulation, a condominium plan may only be amended in accordance with this Part.

Amendments by corporations

71(1) A corporation may register an amendment to a condominium plan to amend that condominium plan if the following requirements have been complied with:

- (a) a special resolution of the corporation has been passed and is in force approving the amendment;
 - (b) in the case of an amendment that relates to
 - (i) any alteration of the boundaries of the parcel, the amendment is endorsed with or accompanied by a certificate of a land surveyor stating
 - (A) that the altered boundaries have been established or re-established in accordance with the *Surveys Act*, and
 - (B) that there are not any projections from other property infringing on the altered boundaries or, if there are projections from other property infringing on the altered boundaries, an appropriate easement exists in respect of the parcel for those projections,
- or
- (ii) a change to the location of a building or a portion of a building as shown on the condominium plan, the amendment is endorsed with or accompanied by a certificate of a land surveyor stating that the building or a portion of the building as shown on the condominium plan as amended is within the external boundaries of the parcel that is the subject of the condominium plan and, if any projections project beyond those external boundaries, that an appropriate easement has been granted as an appurtenance to the parcel;
 - (c) in the case of an amendment that relates to a change in the units, the amendment is endorsed with or accompanied by a certificate of an architect, engineer or land surveyor stating that the change to the units as provided for in the amendment has in fact taken place or will become effective on the registration of the amendment;
 - (d) in the case of an amendment that relates to a change in the common property, the amendment is endorsed with or accompanied by a certificate of an architect, engineer or land surveyor stating that the change to the common property as provided for in the amendment has in fact taken place or will become effective on the registration of the amendment;
 - (e) in the case of an amendment that relates to a matter that needs the approval of the municipal authority, the

amendment is endorsed with or accompanied by a certificate of the municipal authority or of a person designated by the municipal authority stating that the approval has been given by the municipal authority;

- (f) the Court has by an order made under subsection (5) approved the amendment;
- (g) that any conditions imposed by the Court under subsection (5) have been complied with.

(2) For the purpose of amending a condominium plan under this section, the corporation may apply to the Court for an order approving the amendment to the condominium plan.

(3) Where the corporation applies for an order approving an amendment, the corporation must, unless otherwise directed by the Court, give notice of the application to the owners and to each holder of a registered encumbrance.

(4) Where the Court is of the opinion that the nature of the amendment to the condominium plan is such that a certificate required under subsection (1) is not necessary, the Court may waive that requirement.

(5) On an application under subsection (2), the Court may, if it is satisfied that the interests of the persons to whom notice of the application is given will not be unfairly prejudiced, make an order

- (a) approving the amendment to the condominium plan;
- (b) imposing any conditions in respect of the order that the Court considers appropriate in the circumstances;
- (c) awarding costs in respect of the application.

(6) On presentation of the order of the Court made under subsection (5), the Registrar is to amend the condominium plan in accordance with the order.

Doors and windows

72(1) In this section, “doors and windows” means doors and windows as referred to in section 9(3) of the Act.

(2) Notwithstanding section 9(2) of the Act or section 71 of this Regulation, if

- (a) immediately prior to September 1, 2000 the doors and windows of a unit that are located on the exterior walls of the unit were part of the unit, and

- (b) by virtue of section 9(2) of the Act, on September 1, 2000 the doors and windows referred to in clause (a) became part of the common property,

the corporation before September 1, 2002 may, by a special resolution, amend the condominium plan so that doors and windows referred to in clause (b) cease being part of the common property and become a part of the unit.

- (3) On presentation of a special resolution passed pursuant to subsection (2), the Registrar is to amend the condominium plan so that the doors and windows that are the subject of the special resolution are part of the unit.

AR 168/2000 s72;108/2004

Documentation must be completed

73 Where this Regulation or the Act provides that a condominium plan may be amended, the Registrar is to amend the condominium plan on being provided with the appropriate documentation that is completed in a manner acceptable to the Registrar.

Part 8.1 Administrative Penalties, Service

Notice of administrative penalty

73.1 A notice of administrative penalty must be given in writing and must contain the following information:

- (a) the name of the person to whom the administrative penalty is issued;
- (b) identification of the provision of the Act or regulation that was contravened or not complied with;
- (c) a description of the contravention or failure to comply identified under clause (b);
- (d) the amount of the administrative penalty;
- (e) the time period within which the administrative penalty must be paid;
- (f) a statement describing
 - (i) the right to appeal to the Minister under section 78.5 of the Act,

- (ii) the particulars of how an appeal is to be made, and
- (iii) the time in which an appeal is to be made.

AR 181/2017 s15

Time of payment of administrative penalty

73.2 The person to whom an administrative penalty is issued shall pay the penalty

- (a) within 30 days after receipt of the notice of administrative penalty, or
- (b) within the time period specified in the notice of administrative penalty,

whichever is later.

AR 181/2017 s15

Service of Director's orders, notices

73.3(1) A Director's order issued, reconsidered or varied under the Act and a notice of administrative penalty or other written notice or document required by the Act to be issued or sent by the Director must be served

- (a) in the case of an individual,
 - (i) by personal service,
 - (ii) by leaving it for the individual with a person apparently at least 16 years of age at the individual's current or most usual dwelling place,
 - (iii) by sending it by recorded mail to
 - (A) the individual's last known address, or
 - (B) the most recent address provided by the individual to the Director,
- or
- (iv) by sending it by facsimile or other form of electronic transmission to the individual's last known facsimile number or electronic address, if there is a record of so sending it,

and

- (b) in the case of a corporation,
 - (i) by leaving it with a director, manager or officer of the corporation, or the president, chairperson or other

head officer, by whatever name that person is known, of the corporation,

- (ii) by leaving it at the corporation's registered office,
- (iii) by sending it by recorded mail to
 - (A) an address for the corporation listed in a purchase agreement, or
 - (B) the corporation's registered office,
- (iv) in the case of an extraprovincial corporation, by leaving it with, at the address of, or by sending it by recorded mail to the address of
 - (A) the corporation's attorney for service appointed as required by the *Business Corporations Act*,
 - (B) an address in Alberta for the corporation listed in a purchase agreement, or
 - (C) the corporation's principal place of business in Alberta,

or

- (v) by sending it by facsimile or other form of electronic transmission to the corporation's last known facsimile number or electronic address, if there is a record of so sending it.

(2) Service is effected under subsection (1)(a)(iv) or (b)(v) when the sender obtains or receives confirmation of the successfully completed transmission.

(3) Service by recorded mail is not invalid by reason only that

- (a) the addressee refuses to take delivery of the mail,
- (b) the addressee returns the mail, or
- (c) the addressee no longer resides or is otherwise not present at the address and has not provided the postal service with a current mailing address.

AR 181/2017 s15

Part 8.2 Appeals

Appeal fee

73.4 The fee for an appeal made pursuant to section 78.5 of the Act is the lesser of

- (a) \$1000, and
- (b) half of the amount of the administrative penalty set out in the notice of administrative penalty.

AR 181/2017 s15

Part 9 Miscellaneous

Fees under the Land Titles Act

74 The fees payable to the Registrar in respect of matters under the Act are the fees payable to the Registrar under the *Tariff of Fees Regulation* (AR 120/2000) or as otherwise provided for under an enactment.

Fee payable to a municipality

75 A municipal authority may require the payment of a fee of not more than \$40 per unit when application is made to the municipal authority for the certificate referred to in section 10(1)(b)(ii) of the Act.

AR 168/2000 s75;108/2004

Rate of interest re contributions

76 The rate of interest that may be charged by a corporation under section 40 of the Act on any unpaid balance of a contribution owing to the corporation by an owner shall not be greater than 18% per annum.

AR 168/2000 s76;108/2004

Mediation and arbitration

77 If the parties to a dispute referred to in section 69 of the Act wish to deal with the dispute under section 69 of the Act but are unable to agree on a mediator or an arbitrator, as the case may be, the Alberta Arbitration and Mediation Society is, subject to any agreement between the parties, authorized to appoint a person as a mediator or an arbitrator in respect of that dispute.

AR 168/2000 s77;108/2004

Builders' liens

78 For the purposes of section 78(2) of the Act, on the registration of a statement of lien against a condominium plan, the Registrar must send a notice of that registration to the corporation but is not required to send notice of that registration to the owners of the units.

AR 168/2000 s78;108/2004

Exemptions respecting non-residential units

78.1(1) Section 20.01(1)(d) does not apply in respect of non-residential units.

(2) Section 21.1 of the Act and Part 3.1 do not apply in respect of a conversion in which all units in the registered condominium plan are non-residential units.

AR 181/2017 s16

Offence

78.2(1) A developer who fails to comply with section 20.09(4) is guilty of an offence.

(2) Where a body corporate is convicted of an offence, the body corporate is liable to a fine of not more than the greater of

- (a) \$100 000, and
- (b) 3 times the amount obtained by the body corporate as a result of the offence.

(3) Where an individual is convicted of an offence, the individual is liable to a fine of not more than the greater of

- (a) \$25 000, and
- (b) 3 times the amount obtained by the individual as a result of the offence.

AR 181/2017 s16

Part 10

Transitional Provisions, Repeals, Expiry and Coming into Force

79 Repealed AR 108/2004 s10(50).

Transitional

79.1(1) In this section,

- (a) “former” means, in respect of a section of the Act, the section as it read immediately before the coming into force of the corresponding new section;
- (b) “new” means, in respect of a section of the Act, the section as it reads on the coming into force of the section of the *Condominium Property Amendment Act, 2014* that amended the corresponding former section.

(2) Where a plan that is presented for registration differs from the proposed condominium plan delivered under section 12(1) of the Act prior to the coming into force of the new section 8(1)(l.1) of the Act and the new section 10(1)(b) of the Act, a difference caused only by compliance with the new section 8(1)(l.1) of the Act or the new section 10(1)(b) of the Act

- (a) does not trigger a right of rescission under section 13 of the Act, and*
- (b) does not constitute a material change for the purposes of section 13.1 of the Act.*

(NOTE: Subsection (2) comes into force April 1, 2018.)

(3) In respect of a condominium plan that is registered before the coming into force of section 10.1(1) of the Act, if no interim board has been appointed and no board has been elected under section 29 of the Act, section 10.1(1) of the Act is to be read as if “no later than 30 days after registration of a condominium plan” were struck out and “no later than 90 days after the coming into force of this section” were substituted.

(4) Notwithstanding the repeal of the former sections 12 and 13 of the Act, the former sections 12 and 13 of the Act apply in respect of a purchase agreement entered into before the coming into force of the new section 12, section 12.2, the new section 13, and sections 13.1 and 13.2 of the Act.

(NOTE: Subsection (4) comes into force April 1, 2018.)

(5) References in section 14(6.1) and (7.1) of the Act to “prescribed trustee” apply only in respect of purchase agreements entered into 90 days or more after the coming into force of section 14(6.1) and (7.1) of the Act.

(6) Section 16.1 of the Act applies

- (a) in respect of a meeting convened under section 29 of the Act less than 90 days after section 16.1 of the Act comes into force as if “at the meeting” were struck out and “as soon as possible after the meeting” were substituted, and

- (b) in respect of a meeting under section 29 of the Act convened 90 days or more after section 16.1 of the Act comes into force without any modification.

(7) Section 21.1 of the Act applies in respect of a conversion for which a condominium plan was registered before the coming into force of section 21.1 of the Act, but only if no purchase agreement respecting the purchase of a unit in an arms-length transaction was entered into before the coming into force of section 21.1 of the Act.

(8) The new section 29 of the Act does not apply if, before the coming into force of the new section 29 of the Act, a meeting was convened in accordance with the former section 29 of the Act.

(9) The new section 30(1) of the Act is to be read, in respect of a condominium plan registered 8 months or more before the coming into force of the new section 30(1), as if “no later than 12 months after the registration of the condominium plan” were struck out and “no later than 120 days after the coming into force of this section” were substituted.

AR 181/2017 s17

Repeal

80 The *General Regulation* (AR 89/85) is repealed.

Expiry

81 For the purpose of ensuring that this Regulation is reviewed for ongoing relevancy and necessity, with the option that it may be repassed in its present or an amended form following a review, this Regulation expires on August 31, 2018.

AR 168/2000 s81;354/2003;103/2011;139/2016

Coming into force

82 This Regulation comes into force on September 1, 2000.

Schedule 1

Form 1

Condominium Property Act Section 8(1)(g), (h) and (j)

Schedule of Unit Factors and Areas

Unit Number	Unit Factor	Approximate Floor Area (Or Approximate Ground Area of Unit, in the case of bare land units)
-------------	-------------	--

=====
 =====
 Total

The basis for determining unit factors is as follows:

Form 2

**Condominium Property Act
 Section 11 of the Condominium Property Regulation**

Certificate of Title

THIS IS TO CERTIFY that _____ is the owner of an estate (describe nature of estate) in Unit No. ___ in Condominium Plan No. ___ and ___ shares in the common property, excepting thereout all mines and minerals, and is subject to the encumbrances, liens and interests endorsed on this certificate of title and on the Condominium Plan, or which may hereafter be made in the register.

In witness whereof I have subscribed my name and affixed my official seal this ___ day of _____, ___.

 (Registrar)

Form 3

**Condominium Property Act
 Section 32**

Notice of Change of By-laws

Condominium Corporation No. ___ hereby certifies that, by a special resolution passed on _____, the by-laws of the corporation were added to, amended or repealed as follows:

(set out terms of resolution)

The seal of Condominium Corporation No. _____ was affixed on _____ in the presence of _____.

 Director

(Corporate Seal)

Form 4**Condominium Property Act
Section 49(4)****Certificate of Corporation**

Condominium Corporation No. ___ hereby certifies that the owners of the units in the condominium plan have, by special resolution properly passed, directed the corporation to execute the instrument hereunder recited and that all persons having registered interests in the parcel and all other persons having interests (other than statutory interests) which have been notified to the corporation have consented in writing to the release of those interests in respect of the land comprised in the instrument+ and the instrument conforms with the terms of that resolution.

Instrument ___ dated _____ to _____ of _____.

The seal of Condominium Corporation No. ___ was affixed on _____ in the presence of _____.

Director

(Corporate Seal)

+ If, in the case of a lease, interested parties have approved in writing of the execution of the lease but have not consented in writing to the release of their interests in respect of the demised land, delete the words "have consented in writing to the release of those interests in respect of the land comprised in the instrument" and substitute the words "have approved in writing of the instrument".

Insert a description of the nature and date of the instrument, the names of the parties to it and a brief description of the land disposed of.

Form 5**Condominium Property Act
Section 62(1)****Notice of Termination of Condominium Status**

Condominium Corporation No. ___ hereby certifies that the condominium status of the building or parcel has been terminated.

Annexed hereto is

+ a certified copy of the special resolution of the owners pursuant to section 60 of the *Condominium Property Act*.

a certified copy of the order made by the Court of Queen's Bench pursuant to section 61 of the *Condominium Property Act*.

The seal of Condominium Corporation No. ____ was affixed on _____ in the presence of _____.

Director

(Corporate Seal)

+ delete if inappropriate

Form 6

Condominium Property Act Sections 52(5) and 63(4)

Certificate of Corporation

Condominium Corporation No. ____ hereby certifies that the owners of the units in the Condominium Plan have, by special resolution properly passed, directed the Corporation to execute the instrument hereunder recited and that all persons having registered interests in the parcel and all other persons having interests (other than statutory interests) which have been notified to the corporation have consented in writing to the release of those interests in respect of the land comprised in the instrument.

+ Instrument ____ dated ____ to ____ of _____.

The seal of Condominium Corporation No. ____ was affixed on _____ in the presence of _____.

Director

(Corporate Seal)

+ Insert a description of the nature and date of the instrument, the names of the parties to it and a brief description of the land disposed of.

Form 7

**Condominium Property Act
Section 73(2)**

Address for Service

Condominium Corporation No. _____ hereby gives notice that
by a resolution of the board dated _____ it has designated

_____ as the address at which documents may be served on the
Corporation.

The seal of Condominium Corporation No. _____ was affixed
on _____ in the presence of

_____.

Director

(Corporate Seal)

Form 8

**Condominium Property Act
Section 10.1 and 28(5)**

Notice of New or Change of Directors

Condominium Corporation No. _____ hereby gives notice that
effective on the ___ day of _____, _____ the following persons are
the directors of the board of Condominium Corporation No.____:

NAME

ADDRESS

The seal of Condominium Corporation No. _____ was affixed
on _____ in the presence of _____.

Director

(Corporate Seal)

Form 9

Condominium Property Act

**Section 35(1)(I) of the
Condominium Property Regulation**

Certificate of Developer

I, _____, hereby certify that the phased development disclosure statement complies with

- (a) the *Condominium Property Act* and the *Condominium Property Regulation*, and
- (b) all the requirements under the *Condominium Property Act* and the *Condominium Property Regulation*.

Dated: _____
Developer

Form 10

Condominium Property Act

**Section 35(5) of the
Condominium Property Regulation**

Certificate of Developer

I, _____, hereby certify that at least 2/3 of the persons, not including the developer, who are entitled under the *Condominium Property Act* to vote have by resolution consented to the phased development disclosure statement being changed as follows:

or

as shown on the attached Appendix

OR

I, _____, hereby certify that in order for the development to comply with the current development scheme, development control by-law, zoning by-law, land use by-law or other municipal requirement applicable

to that development, the phased development disclosure statement must be changed as follows:

or

as shown on the attached Appendix

Dated: _____

_____ Developer

Form 11

Condominium Property Act

**Section 40 of the
Condominium Property Regulation**

Certificate of Developer

With respect to the phase that is the subject of amendment numbered _____ to Condominium Plan No. _____, I, _____, certify that

- (a) the phase meets the criteria as set out in the phased development disclosure statement, and
- (b) where common property located in that phase is to be available for the use of the owners in the previously completed phases for which certificates of title have been issued, that common property is completed and meets the requirements set out in the phased development disclosure statement.

Dated: _____

_____ Developer

Form 12**Condominium Property Act****Section 60 of the
Condominium Property Regulation****Certificate of Corporation**

Condominium Corporation No. ___ hereby certifies that on ___ the board approved of the consolidation of units ___ and ___.

The seal of Condominium Corporation No. ___ was affixed on ___ in the presence of _____.

Director

(Corporate Seal)

AR 168/2000 Sched.;108/2004;151/2006;181/2017

Schedule 2**Definitions**

1 In this Schedule,

- (a) “body corporate” includes a company or other body corporate whenever or however incorporated but does not include a corporation incorporated under section 25 of the Act;
- (b) “debentures” includes debenture stock;
- (c) “improved real estate” means an estate in fee simple in land
 - (i) on which there exists a building, structure or other improvement used or capable of being used for residential, commercial or industrial purposes,
 - (ii) on which there is being erected such a building, structure or other improvement,
 - (iii) which is serviced with the utilities necessary for such a building, structure or other improvement, but only when the land is being mortgaged for the purpose of erecting the building, structure or other improvement, or
 - (iv) which is being used for agricultural purposes,but does not include an estate in fee simple in mines or minerals held separately from the surface;

- (d) “loan corporation” means a loan corporation registered under the *Loan and Trust Corporations Act*;
- (e) “municipal corporation” means
 - (i) a municipal authority as defined in the *Municipal Government Act*, or
 - (ii) a municipality or a municipal authority created by legislation similar to the *Municipal Government Act* in another province or territory;
- (f) “securities” includes stocks, debentures, bonds, shares and guaranteed investment certificates or receipts;
- (g) “trust corporation” means a trust corporation registered under the *Loan and Trust Corporations Act*.

Authorized corporation investments

2 A corporation may invest any trust money in the corporation’s hands, if the investment is in all other respects reasonable and proper, in any of the following:

- (a) securities of the Government of Canada, the government of any province or territory of Canada, any municipal corporation in any province or territory of Canada, the Government of the United Kingdom or the Government of the United States of America;
- (b) securities the payment of the principal and interest of which is guaranteed by the Government of Canada, the government of a province or territory of Canada, a municipal corporation in any province or territory of Canada, the Government of the United Kingdom or the Government of the United States of America;
- (c) debentures issued by a school division, school district, drainage district, hospital district or health region under the *Regional Health Authorities Act* in Alberta that are secured by or payable out of rates or taxes;
- (d) bonds, debentures or other evidences of indebtedness of a body corporate that are secured by the assignment to a body corporate of payments that the Government of Canada or the government of a province or territory of Canada has agreed to make, if the payments are sufficient
 - (i) to meet the interest on all the bonds, debentures or other evidences of indebtedness outstanding as it falls due, and

- (ii) to meet the principal amount of all the bonds, debentures or other evidences of indebtedness on maturity;
 - (e) bonds, debentures or other evidences of indebtedness
 - (i) of a body corporate incorporated under the laws of Canada or of a province or territory of Canada that has earned and paid
 - (A) a dividend in each of the 5 years immediately preceding the date of investment at least equal to the specified annual rate on all of its preferred shares, or
 - (B) a dividend in each year of a period of 5 years ended less than one year before the date of investment on its common shares of at least 4% of the average value at which the shares were carried in the capital stock account of the body corporate during the year in which the dividend was paid,
- and
- (ii) that are fully secured by a first mortgage, charge or hypothec to a body corporate on any, or on any combination, of the following assets:
 - (A) improved real estate;
 - (B) the plant or equipment of a body corporate that is used in the transaction of its business;
 - (C) bonds, debentures or other evidences of indebtedness or shares of a class or classes authorized by this section;
 - (f) bonds, debentures or other evidences of indebtedness issued by a body corporate incorporated in Canada if at the date of the investment or loan the preferred shares or common shares of that body corporate are authorized investments under clause (i) or (j);
 - (g) guaranteed investment certificates or receipts of a trust corporation;
 - (h) bonds, debentures, notes or deposit receipts of a loan corporation, trust corporation or credit union;

- (i) preferred shares of any body corporate incorporated under the laws of Canada or of a province or territory of Canada that has earned and paid
 - (i) a dividend in each of the 5 years immediately preceding the date of investment at least equal to the specified annual rate on all of its preferred shares, or
 - (ii) a dividend in each year of a period of 5 years ended less than one year before the date of investment on its common shares of at least 4% of the average value at which the shares were carried in the capital stock account of the body corporate during the year in which the dividend was paid;
- (j) fully paid common shares of a body corporate incorporated in Canada or the United States of America that during a period of 5 years that ended less than one year before the date of investment has either
 - (i) paid a dividend in each of those years on its common shares, or
 - (ii) had earnings in each of those years available for the payment of a dividend on its common shares,

of at least 4% of the average value at which the shares were carried in the capital stock account of the body corporate during the year in which the dividend was paid or in which the body corporate had earnings available for the payment of dividends, as the case may be;
- (k) notes or deposit receipts of banks;
- (l) securities issued or guaranteed by the International Bank for Reconstruction and Development established by the Agreement for an International Bank for Reconstruction and Development, approved by the *Bretton Woods and Related Agreements Act* (Canada), but only if the bonds, debentures or other securities are payable in the currency of Canada, the United Kingdom, any member of the British Commonwealth or the United States of America;
- (m) securities issued or guaranteed by Inter-American Development Bank or by Asian Development Bank, but only if the bonds, debentures or other securities are payable in the currency of Canada or the United States of America;
- (n) first mortgages, charges or hypothecs on improved real estate in Canada, but only if

- (i) the loan does not exceed 75% of the value of the property at the time of the loan as established by a report as to the value of the property made by a person whom the corporation reasonably believed to be a competent valuator, instructed and employed independently of any owner of the property, or
- (ii) the loan is an insured loan under the *National Housing Act, 1954* (Canada) SC 1953-54 c23.

Restrictions on investments

3(1) In determining market values of securities a corporation may rely on published market quotations of a recognized stock exchange in Canada or the United States of America.

(2) In the case of an investment under section 2(e) the inclusion, as additional security under the mortgages, charges or hypothecs, of any other assets not of a class authorized by this Schedule as investments does not render the bonds, debentures or other evidences of indebtedness ineligible as an investment.

(3) No investment may be made under section 2(e), (h) or (i) that would at the time of making the investment cause the aggregate market value of the investments made under those clauses to exceed 35% of the market value at that time of the whole trust estate.

(4) No sale or other liquidation of any investment made under section 2(e), (h) or (i) is required solely because of any change in the ratio between the market value of those investments and the market value of the whole trust estate.

(5) In case of an investment under section 2(i) or (j), not more than 30% of the total issue of shares of any body corporate may be purchased for any trust.

(6) No investment shall be made under section 2(j) that, at the time of making the investment, would cause the aggregate market value of the common shares held for any particular trust fund to exceed 15% of the market value of that trust fund at that time.

(7) No sale or other liquidation of common shares is required under this section solely because of any change in the ratio between the market value of those shares and the market value of the whole trust fund.

Court approved investments

4 In addition to the investments authorized by section 2, a corporation may invest funds in any other securities that the Court of Queen's Bench on application in any particular case approves as fit and proper, but nothing in this section relieves the corporation of the corporation's duty to take reasonable and proper care with respect to the investments so authorized.

Deposit of trust funds

5 A corporation may, pending the investment of any trust money, deposit it for a time that is reasonable in the circumstances

- (a) in any bank or treasury branch,
- (b) in any trust corporation,
- (c) in any credit union, or
- (d) in any loan corporation.

Registration of securities

6 Except in the case of a security that cannot be registered, a corporation that invests in securities shall require the securities to be registered in the corporation's name, and the securities may be transferred only in the corporation's name.

Variation of investments

7(1) A corporation in the corporation's discretion may

- (a) call in any trust funds invested in securities other than those authorized by this Schedule and invest the funds in securities authorized by this Schedule, and
- (b) vary any investments authorized by this Schedule.

(2) No corporation is liable for a breach of trust by reason only of the corporation's continuing to hold an investment that since its acquisition by the corporation has ceased to be one authorized by the instrument of trust or by this Schedule.

(3) When a corporation has improperly advanced trust money on a mortgage that would at the time of the investment have been a proper investment in all respects for a lesser sum than was actually advanced, the security is deemed to be an authorized investment for that lesser sum and the corporation is liable to make good only the amount advanced in excess of the lesser amount with interest.

Concurrence by corporation in corporate schemes

8(1) When a corporation holds securities of a body corporate in which the corporation has properly invested money under this Schedule, the corporation may concur in any compromise, scheme or arrangement

- (a) for the reconstruction of the body corporate or for the winding-up or sale or distribution of its assets,
- (b) for the sale of all or any part of the property and undertaking of the body corporate to another body corporate,
- (c) for the amalgamation of the body corporate with another body corporate,
- (d) for the release, modification or variation of any rights, privileges or liabilities attached to the securities or any of them, or
- (e) whereby
 - (i) all or a majority of the shares, stock, bonds, debentures and other securities of the body corporate, or of any class of them, are to be exchanged for shares, stock, bonds, debentures or other securities of another body corporate, and
 - (ii) the corporation is to accept the shares, stock, bonds, debentures or other securities of the other body corporate allotted to the corporation pursuant to the compromise, scheme or arrangement,

in like manner as if the corporation were entitled to the securities beneficially and may, if the securities are in all other respects reasonable and proper investments, accept any securities of any denomination or description of the reconstructed or purchasing or new body corporate instead of or in exchange for all or any of the original securities.

(2) A corporation is not responsible for any loss occasioned by any act or thing done in good faith under subsection (1) and the corporation may, if the securities accepted under subsection (1) are in all other respects reasonable and proper investments, retain them for any period for which the corporation could have properly retained the original securities.

Subscription for securities

9(1) If any conditional or preferential right to subscribe for any securities in any body corporate is offered to a corporation in respect of any holding in the body corporate, the corporation may, as to all or any of the securities,

- (a) exercise that right and apply capital money subject to the trust in payment of the consideration, or renounce the right, or
- (b) assign for the best consideration that can be reasonably obtained the benefit of that right, or the title to it, to any person, including any beneficiary under the trust,

without being responsible for any loss occasioned by any act or thing so done by the corporation in good faith.

(2) Notwithstanding subsection (1), the consideration for any such assignment shall be held as capital money of the trust.

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