

MUTUAL OPERATIONS

SHAREHOLDER REGULATIONS

Lockout Procedures

The following will be in effect for units after the death of a shareholder/owner:

1. **Death with Surviving Shareholder/Owner Living in the Unit**

If the death of the shareholder/owner occurred at the unit and a surviving shareholder/owner is living in the unit at the time, a Bereavement Book will be left at the unit by Security.

If the death of the shareholder/owner occurred outside the unit and a surviving shareholder/owner is living in the unit at the time, a Bereavement Book will be provided by Foundation personnel at the time the death is reported.

2. **Death of Sole Owner**

2.1. **Unattended Death**

If death is unattended and the unit is sealed per law enforcement or coroner's order, then no one may access the unit until official next-of-kin determination is made by the coroner's office. Security will leave a Bereavement Book at the unit and place a knob lock on the door. If the door cannot accommodate a knob lock, a plywood sheet shall be affixed over the door. If someone comes forward as Trustee, non-resident co-owner or with other legal authority, Foundation personnel must check with the coroner's office before permitting access to the unit.

2.2. **Attended Death**

Security will identify on the DOA report those present at the time of death, including family members, hospice workers, caregivers, and other individuals. A Bereavement Book will be left at the unit. If someone present is identified as legal authority of the unit and can provide evidence of same, Security will instruct them to visit the Stock Transfer Office as soon as possible. Security will inform all persons present that no one may stay in the unit overnight without Mutual permission, unless they are a registered caregiver or co-occupant.

If legal authority is not established at the unit via documentary evidence, all persons present will be asked to leave the unit until legal authority is established at the Stock Transfer Office. From there, the unit will be knob locked or a plywood sheet shall be affixed to the door. The exception to this is

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if a registered co-occupant or caregiver lives at the unit, or if Mutual permission is obtained.

3. Reporting of Death of Mutual President

Shareholder/owner deaths shall be reported to the Mutual President within one (1) to two (2) business days with the following information:

- 3.1** Name of decedent
- 3.2** Date and location of death
- 3.3** Identification of persons present at unit (if any)
- 3.4** Name, relationship and contact information of surviving shareholder/owner (if any)
- 3.5** Name, relationship and contact information of decedent's emergency contacts (if no surviving shareholder/owner is present at the unit)
- 3.6** If legal authority has been established
- 3.7** If/how the unit was secured
- 3.8** If there are any registered co-occupants, caregivers or pets at the unit

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