SUN CITY *Anthem*

Resale

Ordering Packages

- **Online Orders.** Homeowners can order mandatory HOA Resale Packages and HOA Demands online **(RESALE PACKAGE ORDER)**
- **Support.** Direct administrative questions to Customer Service at **800-353-2939** or via email at **customerservice@getdocsnow.com**.

Associated Costs

- **Standard Delivery.** A Resale Disclosure Package costs $185, and the HOA Demand costs $165 for standard 10-day delivery.

Closing Fees and Exemptions

Standard Closing Costs

- **Transfer Fee.** A one-time fee of $350 is assessed at closing.
- **Architectural Committee (ARC) Fee.** A one-time processing fee of $100 applies to all property transfers.

Asset Enhancement Fee (AEF)

- **Assessment Rate.** Buyers or sellers must pay a one-time Asset Enhancement Fee equal to **1/3 of 1%** of the final purchase price.
- **Historical Exemption.** Any owner who acquired title to their lot on or before **April 19, 2004** (the recording date of the AEF amendment) is exempt from this fee.

Exempt Title Transfers. Property transfers occurring after April 19, 2004, are exempt from the Asset Enhancement Fee if the transaction falls into one of the following legal categories:

- Transfers to or by the Declarant, or its successor in interest.
- Transfers by a builder or developer holding title solely for development and resale.
- Title transfers between established co-owners of a lot.
- Transfers from an owner to themselves and a family member.
- Transfers to an owner’s estate, surviving spouse, or legal heirs upon the death of the owner.

- Transfers to an entity wholly owned by the property owner, or to a family trust created for the direct benefit of the owner, spouse, or legal heirs.
- Transfers to an institutional lender as security for a mortgage obligation.
- Transfers to a recognized 501(c)(3) non-profit organization.

Note on Consecutive Exemptions: If an owner transfers title through one or more of these exempt methods, the new title holder inherits the original owner's historical status for future fee determinations. For example, if an original pre-amendment owner conveys their lot to a family trust, the trust is treated as a pre-amendment owner when the property is eventually sold to the public.