



## GUIDELINE REGARDING DISTRIBUTION OF HISTORICAL SURVEY DOCUMENTS

Members of the Association are, from time to time, requested by clients or other members of the public to provide copies of survey documents previously prepared. In determining whether or not a copy will be provided, the following Guidelines should be taken into consideration:

1. Any Plan of Survey or survey document prepared before and up to 1983 for the purposes of obtaining a mortgage should not be redistributed.
2. Any Plan of Survey or a survey document showing a foundation only or a dwelling under construction should not be redistributed.
3. The member is not obliged to provide copies of Plans of Survey, survey opinions or survey documents to a third party, but may do so in the exercise of his or her individual discretion. Members are strongly advised to ensure that such information includes cautionary notes regarding the currency of the information and disclaimers covering use.
4. Members should recognize and consider issues of privacy and confidentiality on behalf of the original client when determining whether to release historical information to a third party. Consideration might be given to obtaining waivers from clients.
5. In determining whether or not to provide copies of Plans of Survey (not covered under 1 and 2 above) to the original client, the following should be taken into consideration.
  - a) If a member is aware that the copy of the Plan of Survey or survey document is to be used for a new transaction, and if the member believes that the use of the copy for that purpose may put either the user of the document or the member at risk, the member may refuse to provide a copy.
  - b) If the member believes that changes have taken place regarding the property, a copy of the original Plan of Survey or survey document should not be re-issued and the client should be advised to obtain an update.