

**SEAL BEACH MUTUAL NO. TWELVE****Mutual Operations-Lockout Procedures**

1. Upon a report to Security or to the Stock Transfer Office of the Foundation (See Policy 7710 Estate Transaction and Creditor Claims) of the death of a shareholder/owner, the following actions will be initiated depending upon the circumstances of death:
2. Death with Surviving Shareholder/Owner Living in the Unit
  - 2.1. When 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.
  - 2.2. When 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.
3. Death of Sole Owner – The sole responsibility of the Board of Directors is protection of Mutual property.
  - 3.1. Unattended Death Within the Unit
    - 3.1.1. When 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 secure the unit by placing a knob lock on the door.
    - 3.1.2. When a knob lock cannot be affixed, Security shall obtain permission from the Mutual Twelve Board of Directors or the President and one other Officer to re-key the lock, change out the lock or add an additional lock such as a deadbolt or a hasp hinge lock.
    - 3.1.3. If circumstances are such that the lockout procedures stated above cannot be accomplished, and as long as the Coroner's office while it has control of the property does not object, the method of securing the unit shall require permission of the Mutual Twelve Board of Directors or the President and one other Officer.
    - 3.1.4. When someone comes forward as Trustee, nonresident co-owner or with other legal authority, and the coroner's office has released its hold on the premises, Foundation personnel shall review the documentary evidence presented to establish legal authority to enter the unit and report to the Mutual President as per Section 4. Reporting of Death to Mutual President.

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- 3.2. Attended Death Within the Unit**
- 3.2.1.** 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 identifies 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.
- 3.2.2.** Security will inform all persons present that no one may stay in the unit overnight without Mutual Twelve permission unless they are a registered co-occupant.
- 3.2.3.** If legal authority is not established at the unit via documentary evidence, all person's present will be asked to leave the unit until legal authority is established at the Stock Transfer Office. From there, as soon as possible, and until such time as legal authority is established, the unit will be knob locked.
- 3.2.4.** When a knob lock cannot be affixed, Security shall obtain permission from the Mutual Twelve Board of Directors or the President and one other Officer to re-key the lock, change out the lock or add an additional lock such as a deadbolt or a hasp hinge lock. The exception to this is if a registered co-occupant lives at the unit in accordance with Civil Code §51.3 (7e), or if Mutual permission is obtained.
- 3.2.5.** In the case of a full-time caregiver who resides in the unit, the caregiver will be given an opportunity to return to the unit to remove his or her personal belongings in the presence of the Mutual Twelve President and one other Officer.
- 3.3. Attended Death Outside the Unit**
- 3.3.1.** Upon notification to the Stock Transfer Office of the death, the following actions will be taken depending upon the circumstances presented. If someone presents and provides legal documentary evidence of legal authority the Mutual President shall be informed, and no further action be taken. Otherwise, and until such time as legal authority is established, the unit will be knob locked.
- 3.3.2.** In the event a knob lock cannot be affixed, Security shall obtain permission from the Mutual Twelve Board of Directors to re-key the

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lock, change out the lock, or add an additional lock such as a deadbolt or a hasp-hinged lock.

- 3.3.3.** Once legal authority is identified, the premises will be released to the decedent's agent.

**4.** Reporting of Death to Mutual President

- 4.1.** Anyone can report a death to the Stock Transfer Office. Then, as soon as possible, the Stock Transfer personnel shall report to the Mutual President with the following information:

**4.1.1.** Name of decedent

**4.1.2.** Date and location of death

**4.1.3.** Identification of persons present at unit (if any)

**4.1.4.** Name, relationship, and contact information of surviving shareholder/owner (if any)

**4.1.5.** Name, relationship, and contact information of decedent's emergency contacts (if no surviving shareholder/owner is present at the unit)

**4.1.6.** If legal authority has been established

**4.1.7.** If/how the unit was secured

**4.1.8.** If there are any registered co-occupants, caregivers, or pets at the

- 4.2.** Additionally, the Stock Transfer Office personnel shall notify by email all Mutual Twelve Directors of the shareholder/owner death and update the monthly "DOA" report concurrent with the Pet and Caregiver monthly report.

**Document History**

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