

SEAL BEACH MUTUAL NO. NINE**Shareholder Regulations****Lockout Procedures**

1
2 The following will be in effect for units after the death of a shareholder/owner:
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4 1. Death with Surviving Shareholder/Owner Living in the Unit

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

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

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12 2. Death of Sole Owner

13 a. Unattended Death

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

21 ii. If Stock Transfer Office notifies President that unattended death will take longer than 30
22 days, President should transfer the electricity to the mutual so to keep the refrigerator in
23 working condition and to prevent food spoilage in the event the electricity is turned off.

24 b. Attended Death

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

31 ii. If legal authority is not established at the unit via documentary evidence, all persons
32 present will be asked to leave the unit until legal authority is established at the Stock Transfer
33 Office. From there, the unit will be 7549.09 MUTUAL OPERATIONS SHAREHOLDER
34 REGULATIONS Lockout Procedures Page 2 of 3 (Jan 22) knob locked or a plywood sheet
35 shall be affixed to the door. The exception to this is if a registered co-occupant or caregiver
36 lives at the unit, or if Mutual permission is obtained.

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38 3. Reporting of Death to Mutual President

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

41 i. Name of decedent

42 ii. Date and location of death

43 iii. Identification of persons present at unit (if any)

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

45 v. Name, relationship and contact information of decedent’s emergency contacts (if no
46 surviving shareholder/owner is present at the unit)

47 vi. If legal authority has been established vii. If/how the unit was secured viii. If there are any
48 registered co-occupants, caregivers or pets at the unit

49
50 4. Mutual Procedures for Death of Shareholders

51 a. Upon death of a shareholder, Golden Rain Foundation Security will contact the
52 Mutual President to keep them notified.

53 b. Stock Transfer Department will contact family or next of kin for legal authority to be
54 established.

55 c. If a coroner’s seal is on unit, Mutual President will need to work with the Stock
56 Transfer Department, Security Department, and Mutual Administration Department to
57 receive a written authorization to remove the coroner’s seal.

58 i. Once coroner’s seal is removed from unit, Physical Property will post for a 3-day
59 notice to inspect with reports and pictures taken to document.

60 ii. Once pictures and reports received, an Authorization to Clean form will be
61 submitted to have current cleaning team and/or Servpro clean the unit. Mutual will be
62 responsible for paying the bill upfront and collect after all hearing requirements are met.

63 iii. After Physical Property, Mutual Administration, and the Mutual President have
64 been notified that cleaning has been completed, Physical Property to post for second 3-day
65 notice to document the actions with pictures and reports. 7549.09 MUTUAL OPERATIONS
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67 d. If no legal authority is established or no contact received from deceased
68 shareholder’s next of kin, Stock Transfer Department to contact the Orange County
69 Public Administrator and/or Mutual’s Attorney on next steps.
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Document History

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12 Dec 22
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