

FORMS & SPREADSHEETS INCLUDED WITH
THE PRACTICAL GUIDE TO BUYING AND SELLING PROPERTY MANAGEMENT

BUYER FORMS	
B1 - Marketing Letter to PM Companies	A letter to send out to property mgmt companies asking if they are thinking of selling accounts and/or business.
B2 - Marketing Letter to Real Estate Agents	This letter is a good way to solicit from real estate agents and let them know you only want their clientele for management, not sales.
B3 - Buyer Preliminary Questionnaire	There are so many important questions to ask a potential Seller. Remembering them all is difficult. This questionnaire is extensive and is useful when talking with the Seller.
B4 - Buyer Financial Checklist	This records all the different fees and gross fees of the Seller so that you can review if this is viable for purchase.
B5 - Buyer Proposal Letter	Use this letter to present the Purchase Agreement to the Seller. It can outline your reasons for the terms you offer.
B6 - Purchase Agreement	This is a four-page agreement for an offer between Buyer and Seller to reach agreement on terms and conditions for the accounts and/or business.
B7 - Buyer Transition Checklist	Once Buyer and Seller reach an agreement, it is important to keep track of all the details to ensure a smooth transition. This checklist will help keep everything on track.
B8 - Buyer Letter to Owners FILL IN	The letter to the new property owners from the Buyer is a critical document demonstrating professionalism and efficiency. This is a "fill in form" and is set up for only for a few accounts.
B9 - Buyer Letter to Owners MERGE	This is the same letter as above. The difference is that this is a "merge" document and it is best to use it for multiple properties.
B10 - Buyer Assignment of Mgmt FILL IN	This form assigns the Seller's Management contract to the Buyer and is a "fill in form." Use only for a few owners - recommend using the next form for many property owners.
B11 - Buyer Assignment of Mgmt - MERGE	This is the same letter as above. The difference is that this is a "merge" document and it is best to use it for multiple properties.
B12 - Buyer Letter to Tenants FILL IN	This letter explains to tenants the transition from Buyer to Seller. It should follow the Seller letter to the tenants.
B13 - Buyer Letter to Tenants MERGE	This is the same letter as above. The difference is that this is a "merge" document and it is best to use it for multiple properties.
B14 - Tenant Information Form MERGE	When the Buyer sends a letter to tenants, it is a good idea to include a form confirming names, telephone numbers, email, and other information. This is a fill-in sheet; recommend using the merge version for many properties.
B15 - Buyer Letter to Current Vendors	When buying accounts that will impact maintenance, it is important to notify your current vendors to let them know what is happening and how they can assist you with the transition.
B16 - Buyer Letter to Prospective Vendors	The Seller may have Vendors that can be valuable to the Buyer. This invites those vendors to contact you regarding their services.
B17 - Buyer Monthly Report to Seller	Most Purchase Agreements or offers have a "vesting period" where the Buyer needs to account to Seller each month on any account losses. This report makes this an easier task.
B18 - Buyer Final Account to Seller	The Buyer uses this form after the hold back/vesting period ends, finalizing the sales price.
B19 - Buyer Owner Problem FILL IN	This form is for the Buyer to use as a form of follow up communication after a discussion with the property owner about a difficult problem. It can outline the resolution to achieve.

B20 - Buyer Tenant Problem FILL IN	This form is for the Buyer to use as a form of follow up communication after a discussion with a tenant about a difficult problem. It can outline the resolution to achieve.
B21 - Buyer Owner Follow-up MERGE	After a reasonable period, it is a good policy to follow-up with the property owners on how their satisfaction. Fill in form
B22 - Buyer Owner Survey	This is a good form to include with the owner follow-up letter. Include a self-addressed envelope to assist with responses.
B23 - Buyer Tenant Follow-up MERGE	It can also be useful to find out how the tenants are doing and will help bring out potential problems. This is a fill in form.
B24 - Buyer Tenant Survey MERGE	This form can accompany the Tenant follow-up letter.

SELLER FORMS	
S1 - Seller Preliminary Questionnaire	When talking with a potential Buyer, there are many questions for the Seller to ask. This helps in accumulating important information before negotiating a sale.
S2 - Seller Financial Worksheet	This document will help prepare information on fees for the Buyer and assist in determining the value of the accounts. This also can assist when negotiating with the Buyer. It can also be useful when the final accounting is due.
S3 - Seller Transition Checklist	When reaching agreement with Buyer, it is important for the Seller to keep track of the details for a smooth transition. This can make a big difference on the final sales price after the vesting period.
S4 - Seller Letter to Owners FILL IN	It is important to have a well-worded letter to your property owners explaining why you are selling and a good introduction of the Buyer's company. This is a fill in form.
S5 - Seller Letter to Owners MERGE	This is the same letter as above. The difference is that this is a "merge" document and it is best to use it for multiple properties.
S6 - Seller Letter to Tenants FILL IN	It is equally important to send a letter explaining to tenants the transition to the Buyer's company. This is a fill in form.
S7- Seller Letter to Tenants MERGE	This is the same letter as above. The difference is that this is a "merge" document and it is best to use it for multiple properties.
S8 - Seller Letter to Current Vendors	Your vendors have been loyal and will be losing work. Use this letter to contact them, ask them for your cooperation, and introduce the Buyer's company.
SHARED FORMS	
F1 - Non-competition Agreement	Both Buyer and Seller should have all Personnel sign this form. It is best to have this done prior to any negotiations.
F2 - Confidentiality Agreement	Both Buyer and Seller should have all Personnel sign this form. It is best to have this done prior to any negotiations.
F3 - Counter Offer	Either Buyer or Seller can use this form to counter any terms in the <i>Purchase Agreement</i> .
SPREADSHEETS	
W1 - Owner Spreadsheet	This spreadsheet is a practice document to show how the merge forms work with the property owner documents.
W2 - Tenant Spreadsheet	This spreadsheet is a practice document to show how the merge forms work with the property tenant documents.