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## NEW OWNER CHECKLIST

**Please Note:** this is a two-page **ROUTING** checklist after management contract received!  
Complete appropriate section and forward to next party ASAP

### 1 – Management

Property Manager		Date Received	
Business Source		Referred by	

### Account Name (last name of primary owner)

Mgmt. Term Begins		# Of Properties		# Of Units	
Funds Received	\$	Repair Limit			\$

### Owner basic information

Owner Name					
Spouse			Co-Owners		
Owner Address					
City		State		Zip code	
Home Phone			Work Phone		
Email			Fax Phone		
Alternate Phone			Mobile Phone		

Co-Owner 1 Name		Phone:			
Co-Owner 1 Address					
City		State		Zip code	
Co-Owner 2 Address					
City		State		Zip code	
Co-Owner 3 Address					
City		State		Zip code	

Property in Trust	<input type="checkbox"/> Yes	<input type="checkbox"/> No	Trust #	
Corporate Entity	<input type="checkbox"/> Yes	<input type="checkbox"/> No	Trust #	
Non-US Ownership	<input type="checkbox"/> Yes	<input type="checkbox"/> No	Country	
Non-US Tax Letter req.	<input type="checkbox"/> Yes	<input type="checkbox"/> No		

### Properties – see detailed information on New Property Checklist attached

Total # Of Properties			
Types Of Properties			
<input type="checkbox"/> Single-Family Home # _____		<input type="checkbox"/> Condominiums # _____	
<input type="checkbox"/> Duplex <input type="checkbox"/> Triplex # _____		<input type="checkbox"/> Apartments # _____	
# Properties Occupied		# Of Properties Vacant	
# of Properties for Sale		# Properties in foreclosure	
Other:			

### Current Management

<input type="checkbox"/> Self <input type="checkbox"/> Company:			
Company		Agent name	
Telephone		Cell phone	
Notes:			

**New Owner Checklist, page 2**  
(Route to appropriate party)

<b>2 – Administrative Assistant – Complete by</b>	
<input type="checkbox"/>	Owner file set up – give to Property Manager
<input type="checkbox"/>	Property files set up per Property Information sheets – give to Property Manager
<input type="checkbox"/>	Tenant files set up per Tenant Information sheets – give to Asst. Property Manager
<input type="checkbox"/>	Thank You Letter/Owner Manual/Satisfaction Survey prepared - given to Property Mgr.
<input type="checkbox"/>	New Management Tenant letter prepared for current tenants – give to Property Manager
<input type="checkbox"/>	Owner information prepared, if not received - given to Property Mgr.
<input type="checkbox"/>	Lead-based paint form for owner prepared for required delivery, if not received - given to Property Mgr.
<input type="checkbox"/>	Insurance reminder letter prepared, if not received - given to Property Mgr.
<input type="checkbox"/>	Referral thank you letter, if applicable :
<b>3 – Assistant Property Manager – complete by</b>	
<input type="checkbox"/>	Contact former management company and obtain keys and copies of all rental agreements - contact all tenants, check keys, and rental agreements
<input type="checkbox"/>	Keys and copies of all rental agreements coming from owner - contact all tenants, check keys, and rental agreements
<input type="checkbox"/>	Check rental agreement for appropriate lead-based paint agreements – prepare if necessary and give to property manager
<input type="checkbox"/>	Forward all maintenance to maintenance coordinator
<b>4 – Maintenance coordinator – complete by</b>	
<input type="checkbox"/>	Evaluate all maintenance requests and forward to property manager
<input type="checkbox"/>	Set up keys and lockboxes for all properties/units
<input type="checkbox"/>	Code all keys with color key system
<b>5 – Bookkeeping – Complete by</b>	
<input type="checkbox"/>	Owner funds set up on
<input type="checkbox"/>	Data entry on owner
<input type="checkbox"/>	Set up management fees <input type="checkbox"/> Set up leasing fees <input type="checkbox"/> Collect advertising
<input type="checkbox"/>	ACH letter prepared, if not received - given to Property Mgr.
<input type="checkbox"/>	W-9 letter prepared, if not received - given to Property Mgr.
<b>6 – Management - Manager (complete forms &amp; review)</b>	
<input type="checkbox"/>	Sign thank you letter/owner manual/survey
<input type="checkbox"/>	Sign tenant new management letter
<input type="checkbox"/>	Review all tenant rental agreements and addendum for compliance
<input type="checkbox"/>	Owner information form received <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Survey reminder <input type="checkbox"/> Received on
<input type="checkbox"/>	Maintenance survey received & reviewed <input type="checkbox"/> review all forms received
<input type="checkbox"/>	Review outstanding maintenance for all new properties
<input type="checkbox"/>	Referral thank you and payment sent, if applicable
<b>7 – Management – Broker Review</b>	
<input type="checkbox"/>	Owner File reviewed, signatures or initials applied, returned for filing
<input type="checkbox"/>	Tenant Files reviewed, signatories or initials applied, returned for filing
<b>8 – Administrative Assistant</b>	
<input type="checkbox"/>	Owner and Tenant letters sent
<input type="checkbox"/>	Filing completed