

## INDEX - TENANT FORMS

Please note: all forms are in order by the form number, matching those on the disk. The page number in the workbook is next to each form number below. The forms, letters, and agreements in the Second Edition are new or revised from the first edition published in 2002. There is a brief description of each document.

Form #	Form Title		Description
T1	Application instructions	<b>NEW</b>	Detailed instructions/requirements for completing the application-to-rent
T2	Application	Revised	2-page standard application-to-rent
T3	Cosigner application	<b>NEW</b>	2-page application for cosigner
T4	Currently available	Revised	Computer fill-in form for current vacancy list to distribute; useful during showings
T5	Coming available	Revised	Computer fill-in form for tenants on notice to distribute; useful during showings
T6	Key checkout	<b>NEW</b>	Form to complete when giving a prospective applicant a key to see the property without an agent
T7	Showing disclosure	<b>NEW</b>	Form for disclosing items to prospective tenants, such as a death, work to be completed, etc.
T8	Application receipt	Revised	Receipt detailing costs of processing the application and asking for incomplete information. This is a requirement of some states, such as California
T9	Verify applicant	Revised	2-page verification form to process an application and avoid writing all over the application, which many attorneys recommend. This provides an excellent record in the event there is a challenge to the decision of the application.
T10	Application status	Revised	1-page form to collect processing information on an applicant for <u>multiple tenants</u> to review the progress and determine the outcome.
T11	Verify income	Revised	1-page form to fax to an employer for employment verification
T12	Verify tenant history	Revised	1-page form letter to fax to a landlord/manager for verification of rental history
T13	Credit report request	Revised	Fill-in letter confirming a request for a credit report and putting the person requesting the report to contact the credit bureau for explanations
T14	Accept application	Revised	Fill-in 1-page letter accepting an applicant and includes instructions for renting
T15	Deny application	Revised	Fill-in 1-page letter denying a tenant application
T16	Offer to Rent	Revised	1-page form to take a holding deposit until executing the lease
T17	Complete renting	Revised	Formal notification to an applicant advising them what they must do to complete renting of the property
T18	Mail agreements	Revised	If approved applicants are out of town, this letter gives them instructions on how to complete renting of the property.
T19	Cancel rent offer	Revised	1-page notice to cancel the offer to rent because the approved applicant has not complied with the terms of renting the property
T20	Refund application fee	Revised	Fill-in letter for returning a processing fee when appropriate
T21	Lease agreement	Revised	Fill-in form: detailed 6-page lease agreement which reverts to month-to-month
T22	Month-to-month agreement	Revised	Fill-in form: detailed 6-page rental agreement for month-to-month
T23	Maintenance addendum	Revised	6-page addendum for a rental agreement outlining maintenance procedures and tenant responsibilities
T24	Check in addendum	Revised	This is a detailed 3-page addendum for a rental agreement for walk-through
T25	Lead-based disclosure	Revised	Required lead-based paint agreement for a property built prior to January 1, 1978.

Tenant Forms continued

T26	Pet addendum	Revised	Addendum detailing authorized pets and the tenant's responsibilities for their pet
T27	Drug free addendum	<b>NEW</b>	Addendum detailing and emphasizing drug-free requirements.
T28	Mold/mildew addendum	<b>NEW</b>	Addendum for a property that is subject to mold and mildew; it outlines items that a tenant is to do to prevent mold
T29	Property disclosure	<b>NEW</b>	Addendum detailing any special disclosures such as a death in the property, etc.
T30	Horse addendum	Revised	Addendum detailing the specifics of having a horse on the property
T31	Cosigner addendum	<b>NEW</b>	Addendum when necessary for approved cosigner.
T32	No smoking addendum	<b>NEW</b>	Addendum specifically detailing a no smoking policy in the property
T33	Pool/spa/hot tub/sauna	<b>NEW</b>	Addendum detailing requirements or rules for a pool/spa/hot tub in the property
T34	Furniture inventory	<b>NEW</b>	Inventory addendum for a furnished property for a rental agreement
T35	Move in checklist	Revised	Move in checklist to note condition
T36	Cancel rental agreement	<b>New</b>	Agreement to cancel right after signing and before tenant occupies.
T37	ACH tenant form	<b>NEW</b>	Tenant authorization to transfer money out of their bank account for rent
T38	Tenant welcome	Revised	Letter welcoming the new tenant and re-emphasize when rent is due and how to order maintenance
T39	Tenant work order	Revised	This is a work order that a tenant can submit.
T40	Work order (write in)	Revised	Work order to write in a tenant repair complaint
T41	Work order (computer fill in)	Revised	Work order to fill in a tenant repair complaint directly on the computer.
T42	Late fee letter	Revised	Letter putting the tenant on notice that the rent was late and a late fee is due
T43	NSF letter	Revised	Letter for contacting the tenant formally when unable to contact them by telephone regarding NSF funds
T44	Waive letter	Revised	Letter putting tenant on notice they have had an excellent payment record but that their rent was late. This waives the late fee 1 time only.
T45	3 <sup>rd</sup> party check	<b>NEW</b>	Letter notifying the tenant the management company received a 3 <sup>rd</sup> party check and it is not acceptable
T46	Noise warning notice	<b>NEW</b>	Letter putting the tenant on notice that they are making excessive noise and violating their rental agreement
T47	Personal checks	Revised	Letter putting tenants on notice they have violated their rental agreement by disbursing non-sufficient funds; a personal check is not accepted
T48	Eviction warning letter	Revised	Last ditch effort to coerce the tenant into paying rent after a notice to pay or quit has been served
T49	Unauthorized resident	Revised	Letter regarding illegal resident
T50	Unauthorized pet	Revised	Letter regarding illegal pet
T51	Change terms	Revised	A formal letter notifying the tenant of a change in terms other than a rent increase
T52	Letter of rent increase	Revised	A formal letter notifying the tenant of a rent increase
T53	Tenant billing	Revised	Letter formally requesting a tenant to reimburse the owner for funds
T54	Violent pet	<b>NEW</b>	Letter of demand that tenant remove a dangerous/violent pet

Tenant Forms continued

T55	Pending work for lead-based paint	Revised	A letter detailing required information to the tenant for pending maintenance, which may have lead base paint, with a form for them to return
T56	Request for survey appointment	Revised	Letter requesting a time to see the property and do a survey for the owner
T57	Property survey	Revised	Detailed survey report to send to the owner; form is completed at the property, then filled in on the computer to produce a readable and professional report
T58	Office policy change	<b>NEW</b>	Letter making the tenant aware that the management company changed a policy that could affect them
T59	No deductions letter	Revised	A letter to tenants after they have deducted an expense from their rent ; details expectations in the future
T60	Pest control work letter	Revised	Letter confirming the request of the tenant for pest control work and outlines their responsibilities
T61	Tenant complaint form	<b>NEW</b>	Form giving the tenant an opportunity to air their grievances
T62	Rental agreement violation	Revised	Letter after a violation of the rental agreement has been noted; and requests resolution
T63	Owner selling	Revised	Owner has decided to sell; letter confirms the intention and that the rental agreement remains in effect
T64	Mold letter	<b>NEW</b>	Letter responding to a tenant complaint regarding mold in the property, and is under investigation
T65	Request new information	Revised	Letter when new information is needed from the tenant
T66	Smoke alarm check	Revised	Letter to the tenants requesting they test their smoke alarm, report if it is malfunctioning and a form verifying they have tested it to be returned to the Property Manager
T67	Cable/TV/satellite letter	Revised	Letter instructing tenants on requirements for cable/TV/satellite installation
T68	New management	Revised	Letter for new tenants informing them the company has taken over management of their residence
T69	Tenant death	Revised	Letter to remaining tenants acknowledging the death of a tenant and requesting information/resolution
T70	Tenant survey	<b>NEW</b>	Survey of tenant opinions whenever the management company feels it is appropriate
T71	Partial tenant notice letter	Revised	Letter acknowledging that a tenant has given notice, but not all; requests information from the remaining tenants
T72	Remove tenant addendum	Revised	Addendum to rental agreement for removal of a tenant from the residence
T73	Remove pet addendum		Addendum to remove pet from rental agreement, but not to refund deposit
T74	Add tenant addendum	Revised	Addendum to rental agreement for addition of a tenant to the property
T75	Add pet addendum	Revised	Addendum to rental agreement for addition of a pet to the property
T76	No longer manage	<b>NEW</b>	Letter notifying residents the management company no longer manages the property for the owner.
T77	Transfer security deposit	<b>NEW</b>	Transfer of security deposit from current management company to another party
T78	Request new lease	<b>NEW</b>	Letter requesting the tenant sign a new lease
T79	Lease renewal agreement	Revised	Addendum renewing a lease and also detailing any changes to the lease
T80	Notice to pay or quit	Revised	Notice to pay or quit when rent is unpaid.
T81	Notice of charges	Revised	Notice to pay charges such as late fees, non-sufficient fund fees, etc.

**Tenant Forms continued**

<b>T82</b>	Notice of covenant	Revised	Notice to the tenant of violations to the rental agreement such as noise disturbance, lawn care, etc.
<b>T83</b>	Notice of abandonment	Revised	Notice to post on the property informing the public and/or the tenants that the Property Manager and/or owner believe the property abandoned
<b>T84</b>	Notice to enter dwelling	Revised	Notice to the tenants that Property Manager or Owner will enter the property at a designated time
<b>T85</b>	Notice to vacate to tenant	Revised	Notice to vacate to tenants when such action is needed; and when tenants are on a month-to-month agreement or pending end of lease
<b>T86</b>	Notice from tenant month-to-month	Revised	Form tenants fill out when they are on a month-to-month tenancy and want to vacate; advises them of obligations
<b>T87</b>	Notice from tenant lease	Revised	A form tenants fill out when they are on a lease and want to vacate; advises them of the obligations to the lease
<b>T88</b>	Release rental history	Revised	Form signed by tenants allowing the property management company to give out rental history and payments
<b>T89</b>	Assign security deposit	Revised	Form for tenant's request that another tenant be given the full security deposit and authorizes it in writing
<b>T90</b>	Acknowledge extension	Revised	Letter acknowledging extension of notice to or from tenant
<b>T91</b>	Mortgage co verification	Revised	Letter to the mortgage company requesting tenant history and informing them there is a fee due
<b>T92</b>	Move out instructions	Revised	3-page letter to tenant advising them what to do when vacating the property and detailing move-out requirements
<b>T93</b>	Key return	<b>NEW</b>	Key receipt for when a tenant brings in the keys when vacating
<b>T94</b>	Move out checklist	Revised	Checklist of details to perform when a tenant moves
<b>T95</b>	Full security deposit refund letter	Revised	Letter thanking them for their excellent tenancy and issuing a full refund
<b>T96</b>	Partial security deposit refund letter	Revised	A letter detailing the partial security deposit refund and attaching bills to it
<b>T97</b>	No refund security deposit letter	Revised	Letter detailing to the tenant why they are not receiving a security deposit refund and attaching bills to it
<b>T98</b>	Second request for damages	Revised	Second request for funds due to the owner for damages after moving out.; before any further legal action taken
<b>T99</b>	Security deposit settlement	<b>NEW</b>	This is agreement between owner and/or owner's representative and the former tenant regarding any security settlement dispute
<b>T100</b>	Tenant recommendation	<b>NEW</b>	Form letter to give a written recommendation of a tenant

**THE OWNER FORM DESCRIPTIONS ARE ON THE FOLLOWING PAGE**

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Form #	Page #	Form Title		Description
L1	142	Management inquiry	Revised	Letter to send for management inquiry
L2	143	Management agreement	Revised	4-page management agreement between broker & owner
L3	147	Thank you management	Revised	Thank you letter for a new management account
L4	148	Owner Information sheet	Revised	General information sheet for owner file to track valuable information
L5	149	Lease only agreement	Revised	4-page agreement for lease-only, not on-going management
L6	153	ACH owner authorization	<b>NEW</b>	Form to complete authorization by the owner to transfer funds directly into their bank account
L7	154	Request owner funds	Revised	Letter requesting funds from an owner for their account
L8	155	Request owner insurance	Revised	Letter requesting insurance from an owner for their property
L9	156	Request owner W-9	Revised	Letter requesting completions of a W-9 form from an owner for their account
L10	157	Request repair authorization	Revised	A general letter requesting repairs and funds from an owner for their property
L11	158	Request management renewal	<b>NEW</b>	Letter informing an owner of an increase to their management fee
L12	159	Management fee increase letter	<b>NEW</b>	Letter requesting funds from an owner for their account
L13	160	Property rented letter	Revised	Letter informing an owner that the property has been successfully rented; details funds, lease, etc.
L14	161	Tenant notice letter	Revised	Letter to the owner that a tenant has given a notice to vacate and detailing the steps that will be taken
L15	163	Change office policy	<b>NEW</b>	Letter making an owner aware that there is a change of policy with management company
L16	165	Client survey	<b>NEW</b>	Survey for owners to complete to monitor customer satisfaction and make
L17	168	Mold letter	<b>NEW</b>	Letter notifies the owner that their tenant submitted a mold complaint and action is required immediately.
L18	169	Transfer security deposit	<b>NEW</b>	Letter transferring the security deposit to owner at their request
L19	170	Full lease payment	<b>NEW</b>	Letter puts the owner on notice that a prospective applicant/tenant wants to pay the entire amount of the lease, and put that owner on notice that there could be tax consequences
L20	171	Year end policy	<b>NEW</b>	Letter that outlines the ending year information and what an owner should expect and what responsibility they bear
L21	172	Annual property survey	<b>NEW</b>	Letter accompanies an annual survey report of their property and the status of the maintenance.
L22	173	Lead-based paint letter	<b>NEW</b>	A letter to accompany form for owner to sign for lead-based paint disclosure
L23	174	Lead-based paint work	<b>NEW</b>	Letter notifying owner of work needed that requires vendor qualified for lead-based work and seeks authorization
L24	175	Cancel management	Revised	Letter notifying an owner of termination of management
L25	176	Close account letter	<b>NEW</b>	Final letter for ending management/transferring funds