



NEW OWNER CHECKLIST

Property Owner Name: _____ Date: _____

Property Address: _____

NOTES: _____

MANAGEMENT INFORMATION – SALES & LEASING AGENT

1. Review the completed management agreement. Verify signature, owner address, phone, email, and rent ranges are on the last page. *Tenanted Property.* Yes No
 Tenant Name: _____ Phone: _____
 Tenant Email: _____ Current Rent: _____
2. Obtain \$400 maintenance reserve for property. Check Credit Card
3. Obtain necessary keys, gate codes and openers for property. Yes No
 Front Door: _____ Mail: _____ Gate: _____ Garage Door: _____ Other: _____
4. Management Fee: _____ Setup Fee: _____ Marketing Fees: _____
5. Forward file to Office Manager for review. **REVIEWED Initial:** _____
6. Forward file to Assistant Property Manager

OWNER & PROPERTY SETUP – ASSISTANT PROPERTY MANAGER

1. Create Owner and Property profile in Appfolio & Set-up file for owner (*Tax ID required*)
2. Record maintenance fee and new vendor information.
3. Change address on all accompanying bills.
4. Sent welcome email to owner and Appfolio portal login email.
5. Obtain necessary keys, gate codes and openers for property. Yes No Tagged
6. Verify utility hook up and information and send in Owner Utility Authorization forms.
7. Scan Management Agreement and upload to owner portal.
8. Verify: property data sheet, insurance, deed of trust, and warranty information.
9. If property has tenants, obtain copies of the leases, and any outstanding monies due.
10. Obtain CCR's (PDF) Home owners rules & renters privileges.
11. Forward to Property Manager if tenanted property, otherwise forward to Office Manager.

TENANT SETUP - PROPERTY MANAGER (Tenanted property)

1. Create Tenant profile in Appfolio & Set-up file
2. Sent welcome email to tenant and Appfolio portal login email.
3. Posted Welcome Letter on property.
4. Forward file to Office Manager.

Foreword Checklist to Office Manager for review. **REVIEWED Initial:** _____

ASSISTANT PROPERTY MANAGER - FILE COMPLETED: Filed Date: _____