

PROPERTY MANAGEMENT AGREEMENT CHECKLIST

REQUIRED

- A. \$250 Check, per property, to open trust account if property is vacant.
- B. 4 Copies of each key(s) to property(s) – including mailboxes, pool, keycard.
- C. Warranty information on all appliances (A/C Units, Water Heater, Etc.)
- D. Homeowners association rules, pool keys and contact information for the HOA management office.
- E. Completed W-9 IRS tax form.

OPTIONAL

- A. A copy of current lease(s): for occupied properties
- B. Security deposit held for current tenant: for occupied properties
- D. A list of personal item left on the property (Appliances, Furniture, Mini-Blinds, Etc.)
- E. Please indicate the expiration date on the warranty information.
- F. Builders warranty information if the property is new construction or within the warranty period.
- I. Please indicate the expiration date on the warranty information. closing date:
- J. Proof of Insurance
- M. Would the owner consider a lease shorter than 12 months ___
- P. Pet Limitations, if any ___

It is critical for new owners to send/deliver all the necessary items on the checklist. We will not advertise nor conduct an inspection until we receive all the necessary listed items. One of the most critical items we need is item d, a check for \$250. This check opens your trust account. This trust is your money which we as the agent, access to pay bills/invoices etc. For example: new properties need to have their lawns mowed and power needs to be turned on for all properties. With the monies from your trust account, your property manager is able to handle/manage these needs on your behalf.