



## PROPERTY MANAGEMENT CLIENT/TENANT FILE CHECKLIST

Property Address:  
Resident:  
Telephone:  
Assessor/Treasurer Printout  
Owner:  
Address:  
Telephone, email, etc.:

- Property Management Agreement \_\_\_\_\_
- Definition of Working Relationships \_\_\_\_\_
- Lead Based Paint Obligation (pre 1978) \_\_\_\_\_
- Lead Based Paint Disclosure \_\_\_\_\_
- Property tour and features noted \_\_\_\_\_
- Property Photographs \_\_\_\_\_
- Broker Showing Log Complete and in Showing Book \_\_\_\_\_
- Key to Property \_\_\_\_\_
- Sign Posted \_\_\_\_\_
- Brochures Placed \_\_\_\_\_
- LockBox Placed \_\_\_\_\_

Tenant

- Application Complete \_\_\_\_\_
- Background Check Complete \_\_\_\_\_
- Walk Through, Condition Report Complete \_\_\_\_\_
- Advise Resident Funds Required To Move In \_\_\_\_\_
- Signed Lease, Cond Report Copies Delivered To All Parties \_\_\_\_\_
- Good Funds Received From Tenant \_\_\_\_\_
- Advise Owner and Tenant To Transfer Applicable Utilities \_\_\_\_\_
- Keys to Tenant \_\_\_\_\_
- Tenant Funds Deposited \_\_\_\_\_
- Management/Leasing Fee Collected \_\_\_\_\_
- Excess Funds To Owner \_\_\_\_\_
- For Rent Sign and Lock Box Removed \_\_\_\_\_
- Review File Contents \_\_\_\_\_
- Log closing info on client list \_\_\_\_\_
- File In Property Management Lease File \_\_\_\_\_
- Client Gift and Thank You Letter \_\_\_\_\_
- Referral Letter From Client \_\_\_\_\_