

new management

property address: \_\_\_\_\_

property owner: \_\_\_\_\_

management consultant: \_\_\_\_\_ date listed: \_\_\_\_\_

portfolio manager: \_\_\_\_\_ date assigned: \_\_\_\_\_

date property available: \_\_\_\_\_ date property occupied: \_\_\_\_\_

	Date	Initials	
<b>MC</b> Record on TaskTracker™	_____	<input type="checkbox"/>	
<b>MC</b> Confirm Management Contract completed and signed in full	_____	<input type="checkbox"/>	
<b>MC</b> Confirm Digital Solar Agreement completed and signed in full	_____	<input type="checkbox"/>	
<b>MC</b> Confirm Digital locks completed and signed in full	_____	<input type="checkbox"/>	
<b>MC</b> Confirm Drug Detection Monitoring unit completed and signed in full	_____	<input type="checkbox"/>	
<b>PMC</b> Copy and identify original as Company copy, copy as property owner copy	_____	<input type="checkbox"/>	
<b>MC</b> Ensure all details accurate and logged to property owner PM Software file	_____	<input type="checkbox"/>	
<b>PMC</b> Assign 'New Management' portfolio category to property owner and property computer files	_____	<input type="checkbox"/>	
<b>MC</b> Assign management to portfolio manager (do not assign on PM Software at this stage)	_____	<input type="checkbox"/>	
<b>PMC</b> Enter details of property owner insurance policies and renewal dates	_____	<input type="checkbox"/>	
<b>PMC</b> Confirm adequate public liability insurance is held and copy retained on file	_____	<input type="checkbox"/>	
<b>MC</b> Confirm smoke detector and safety switch compliance (file copy)	_____	<input type="checkbox"/>	
<b>MC</b> Confirm cord compliance (file copy)	_____	<input type="checkbox"/>	
<b>MC</b> Confirm pool compliance (if applicable) (file copy)	_____	<input type="checkbox"/>	
<b>MC</b> Confirm carbon monoxide compliance (if applicable) (file copy)	_____	<input type="checkbox"/>	
<b>PMC</b> Log details of property owner maintenance instructions and spend limit to property computer file	_____	<input type="checkbox"/>	
<b>MC</b> Log details of property to property PM Software file	_____	<input type="checkbox"/>	
<b>MC</b> Prepare detailed property description and log to Rent Manager property file	_____	<input type="checkbox"/>	
Include in description:			
• Marketing headline	<input type="checkbox"/>		
• Highlight features	<input type="checkbox"/>		
• Number of bedrooms, bathrooms, car spaces and living rooms	<input type="checkbox"/>		
• Comprehensive and detailed description	<input type="checkbox"/>		
<b>MC</b> Schedule date and time for Incoming Property Condition report to be completed	_____	<input type="checkbox"/>	
<b>PM</b> Include property on the appropriate schedule for property assessment inspection	_____	<input type="checkbox"/>	
<b>PMC</b> Arrange completion of floor plans and photography (if applicable)	_____	<input type="checkbox"/>	
<b>PMC</b> Arrange 'Rent Me...I'm Perfect For YOU' sign to be erected	_____	<input type="checkbox"/>	
<b>PMC</b> Log sign to SignTracker™	_____	<input type="checkbox"/>	
<b>PMC</b> Upload property listing to applicable websites (company/generic/etc.)	_____	<input type="checkbox"/>	
<b>PMC</b> Arrange and book other advertising and marketing as per agreed marketing plan	_____	<input type="checkbox"/>	
<b>MC</b> Email copies of advertising to property owner, confirm property is listed	_____	<input type="checkbox"/>	
<b>PMC</b> Create property owner/property paper file and suspension storage file	_____	<input type="checkbox"/>	
<b>PMC</b> Post copy of Management Contract to property owner together with 'Welcome Letter'	_____	<input type="checkbox"/>	
<b>PMC</b> Prepare and post separate 'Welcome Letter' from Company Leadership Team	_____	<input type="checkbox"/>	
<b>PMC</b> Prepare and post separate 'Introduction Letter' from Portfolio Manager	_____	<input type="checkbox"/>	
<b>PMC</b> Post notification to local City for accounts assignment	_____	<input type="checkbox"/>	
<b>PMC</b> Post notification to Strata/HOA Manager for accounts assignment	_____	<input type="checkbox"/>	
<b>PMC</b> Post notification to Insurance provider for accounts assignment	_____	<input type="checkbox"/>	
<b>PMC</b> Post notification to Matter for accounts assignment	_____	<input type="checkbox"/>	
<b>PMC</b> Post notification to Water Utilities provider for accounts assignment	_____	<input type="checkbox"/>	
<b>PMC</b> Arrange Property Owner's Protection Insurance cover	_____	<input type="checkbox"/>	
<b>PMC</b> File copy of Property Data search and copy of latest rates notice (or settlement statement if recently purchased property)	_____	<input type="checkbox"/>	
<b>PMC</b> Arrange installation of digital locks	_____	<input type="checkbox"/>	



- PMC Log keys in register and computer, tag, code, photocopy and store in cabinet \_\_\_\_\_
- PM Inspect property and Incoming Property Condition report \_\_\_\_\_
- PM Advise Management Consultant of necessary cleaning, repairs, gardening, etc \_\_\_\_\_
- MC Arrange necessary repairs, maintenance, gardening and/or cleaning \_\_\_\_\_
- MC Arrange transfer of payment for work orders (if applicable) \_\_\_\_\_
- PMC Attach 'Contact Management Plan' for new management to keep property owner Updated and informed \_\_\_\_\_
- MC Arrange SHOW™ times and include on schedule \_\_\_\_\_
- MC Ensure all of team are aware of new listing including listing/viewing/leasing instructions \_\_\_\_\_
- MC Email details of new listing to entire Company sales agents team \_\_\_\_\_
- PMC Advise data base of prospective tenants matching new listing \_\_\_\_\_
- PMC Issue work order to smoke detector technician to conduct safety assessment \_\_\_\_\_
- PMC Issue work order to cord compliance technician to conduct safety assessment \_\_\_\_\_
- PMC Issue work order to pool compliance technician to conduct safety assessment \_\_\_\_\_
- PMC Issue work order to water compliance technician to conduct safety assessment \_\_\_\_\_
- PMC Issue work order for all other required compliance certificates and assessments \_\_\_\_\_

**DOCUMENT FILING:**

- PMC All relevant information and documents, as below, filed in property owner/property paper file \_\_\_\_\_

**Copies of documents and order of filing on property owner/property paper file AND/OR computer file**

- |  | P                        | C                        |
|--|--------------------------|--------------------------|
| • Original Management Contract                                       | <input type="checkbox"/> | <input type="checkbox"/> |
| • Copy of property legal title                                       | <input type="checkbox"/> | <input type="checkbox"/> |
| • Signed schedule of auxiliary fees                                  | <input type="checkbox"/> | <input type="checkbox"/> |
| • Signed original proof of advice for preparing property for tenants | <input type="checkbox"/> | <input type="checkbox"/> |
| • Signed Marketing/Advertising schedule                              | <input type="checkbox"/> | <input type="checkbox"/> |
| • Property Appraisal TrackMate™                                      | <input type="checkbox"/> | <input type="checkbox"/> |
| • Photocopy of all keys and remotes handed over and signed           | <input type="checkbox"/> | <input type="checkbox"/> |
| • Copy of digital locks and access instructions                      | <input type="checkbox"/> | <input type="checkbox"/> |
| • Copy of Property Data search report                                | <input type="checkbox"/> | <input type="checkbox"/> |
| • Copy of local City rates notice                                    | <input type="checkbox"/> | <input type="checkbox"/> |
| • Copy of Strata Information/HOA and community by-laws               | <input type="checkbox"/> | <input type="checkbox"/> |
| • Copy of Digital Solar Agreement                                    | <input type="checkbox"/> | <input type="checkbox"/> |
| • Copy of Digital Locks Agreement                                    | <input type="checkbox"/> | <input type="checkbox"/> |
| • Copy of Drug Detection Monitoring Unit Agreement                   | <input type="checkbox"/> | <input type="checkbox"/> |
| • Copy of Water Utilities rates notice                               | <input type="checkbox"/> | <input type="checkbox"/> |
| • Copy of Insurance Certificate stating public liability cover       | <input type="checkbox"/> | <input type="checkbox"/> |
| • Smoke Detector and Safety Switch Compliance Certificate            | <input type="checkbox"/> | <input type="checkbox"/> |
| • Cord Safety Compliance Certificate                                 | <input type="checkbox"/> | <input type="checkbox"/> |
| • Water Compliance Certificate                                       | <input type="checkbox"/> | <input type="checkbox"/> |
| • Pool Safety Compliance Certificate                                 | <input type="checkbox"/> | <input type="checkbox"/> |
| • Carbon Monoxide Compliance Certificate                             | <input type="checkbox"/> | <input type="checkbox"/> |
| • Copy of other insurance details                                    | <input type="checkbox"/> | <input type="checkbox"/> |
| • Appraisal Form   | <input type="checkbox"/> | <input type="checkbox"/> |
| • DEMO™ Form   | <input type="checkbox"/> | <input type="checkbox"/> |
| • STAT™ Form   | <input type="checkbox"/> | <input type="checkbox"/> |
| • Copy of request to organize Landlord Protection Insurance          | <input type="checkbox"/> | <input type="checkbox"/> |
| • Welcome Letter   | <input type="checkbox"/> | <input type="checkbox"/> |
| • Floor plan   | <input type="checkbox"/> | <input type="checkbox"/> |
| • Property photography and images                                    | <input type="checkbox"/> | <input type="checkbox"/> |
| • Copies of all advertisements and website listings                  | <input type="checkbox"/> | <input type="checkbox"/> |
| • New Management TrackMate™  | <input type="checkbox"/> | <input type="checkbox"/> |

**TrackMate™ verified for completion:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**NB:** If any item is not applicable write next to item N/A