

management listed for sale

property address:	_____
property owner:	_____
tenant/s:	_____
portfolio manager:	_____ date: _____
sales consultant:	_____ branch: _____
date listed for sale:	_____ date sale settled: _____

to avoid error and liability, all communication between sales and property management must be in writing or via email

	Date	Initials
PMC Record and log to TaskTracker™	_____	<input type="checkbox"/>
SA Sales agent forward email to portfolio manager to advise property listed for sale	_____	<input type="checkbox"/>
SA Notify Company Management property management property listed for sale	_____	<input type="checkbox"/>
SA Notify property management Team Leader advising property listed for sale	_____	<input type="checkbox"/>
PM Email received from agent advising property listed for sale	_____	<input type="checkbox"/>
PMC Issue sales agent with computer generated form containing <ul style="list-style-type: none"> • tenant name and contact details • tenancy term (tenancy start and end date) • rental amount • bond • property owner details 	_____	<input type="checkbox"/>
SA Sales agent to issue tenant/s with a Notice of Property owners Intention to Sell Premises form	_____	<input type="checkbox"/>
PMC Forward letter to tenant/s from portfolio manager confirming property listed for sale	_____	<input type="checkbox"/>

ensure property management team leader receives a copy of every entry notice issued to tenant/s

PMC Paper file all copies of entry notices to tenant file and log dates of entry to tenant computer file	_____	<input type="checkbox"/>
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PROPERTY UTILITIES AND SERVICE AGREEMENTS

SA Confirm if property has digital solar energy and service agreement	_____	<input type="checkbox"/>
SA Confirm if property has rain water tank and service agreement	_____	<input type="checkbox"/>
SA Confirm if property has sewage system and service agreement	_____	<input type="checkbox"/>
SA Confirm if property has garden/lawn maintenance and service agreement	_____	<input type="checkbox"/>
SA Confirm if property has pool maintenance and service and service agreement	_____	<input type="checkbox"/>
SA Confirm if property smoke detector compliance and service agreement	_____	<input type="checkbox"/>
SA Confirm if property has curtain cord compliance and service agreement	_____	<input type="checkbox"/>
SA Confirm if property has safety switch compliance and service agreement	_____	<input type="checkbox"/>
SA Confirm if property has carbon monoxide compliance and service agreement	_____	<input type="checkbox"/>
SA Confirm details of tenancy, history and any other agreements	_____	<input type="checkbox"/>

ONCE PROPERTY HAS AN UNCONDITIONAL CONTRACT:

SA Advise portfolio manager if tenancy requires termination including date and action required (confirm tenancy term to ensure notice can be given within required notice period	_____	<input type="checkbox"/>
Or		
SA If property purchased by investor with tenant/s continuing in property, arrange for portfolio manager to contact purchaser to coordinate management	_____	<input type="checkbox"/>
PMC If management is continuing with Company forward letter to tenant/s confirming no changes	_____	<input type="checkbox"/>
Or		

- PM** If tenancy terminating Portfolio Manager to follow and coordinate Vacating Tenant TrackMate™ _____
- PM** If management terminating, portfolio manager to follow and coordinate Conclusion of Management TrackMate™ _____

PRIOR TO CLOSING (IF PROPERTY PURCHASED AS INVESTMENT)

- PM** Portfolio manager to follow/coordinate New Management TrackMate™ _____
- PMC** Schedule date in computer as reminder of contract closing day _____
- SA** Arrange for seller's closing lawyer to pro-rata received rental payments _____

CLOSING DAY:

- PMC** Provide details of tenant's rental paid to date to sales agent _____
- PM** Ensure rental payments are credited to appropriate property owner (do not make adjustments to funds already received – they must be transferred to the property owner funds were originally receipted to as closing lawyer will make adjustments at time of property closing) _____
- PM** Attach property computer file and tenant computer file to new property owner _____
- PMC** File copy of closing statement on new property owner paper and computer file to confirm transfer of ownership _____
- FC** Disburse funds in trust to property owner funds receipted to during standard monthly processing _____

TrackMate™ verified for completion: _____ **Date:** _____

NB: This form is for internal use only and not to be used when dealing with a sales agent from an outside firm.

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