

property appraisal

property address: _____

property owner: _____

tenant/s (if occupied): _____

management consultant: _____ date of enquiry: _____

method of enquiry: email/phone/branch visit/prospect conversion/other: _____

referring sales agent or client: _____ if client: owner or tenant: _____

scheduled date of appraisal: _____ appraised rental amount: _____

date converted to new management: _____ management fee: _____

assigned portfolio manager: _____ portfolio name: _____

tenant occupation date: _____ rental amount: _____

	Date	Initials
MC Record on TaskTracker™	_____	<input type="checkbox"/>
MC Request details from enquiring property owner including full name and address, contact numbers and email	_____	<input type="checkbox"/>
MC Request details of property including full address, number of bedrooms and Special or unique property features	_____	<input type="checkbox"/>
MC Request details of features of the area where the property is located	_____	<input type="checkbox"/>
MC Request details of energy source to home (is it solar?)	_____	<input type="checkbox"/>
MC Create property owner and property PM Software files and log details	_____	<input type="checkbox"/>
MC Save both PM Software files to 'Prospective Management' portfolio category	_____	<input type="checkbox"/>
MC Schedule time for appointment to conduct appraisal of property	_____	<input type="checkbox"/>
MC Search property data for confirmation of property owner/property details (print report)	_____	<input type="checkbox"/>
PMC Prepare Management Contract directly from PM Software files	_____	<input type="checkbox"/>
PMC Prepare Property Management Prospectus and letter 'At Your Service'	_____	<input type="checkbox"/>
PMC Email Management Prospectus and Agency Profiles to property owner confirming appointment	_____	<input type="checkbox"/>
MC Prepare DEMO™ and STAT™ forms analysing Property Data together with rental stats for area and conduct search of property portals, newspaper, etc. for similar listed properties	_____	<input type="checkbox"/>
APPRAISAL MEET AND GREET APPOINTMENT:		
PMC Have ready relevant property appraisal form	_____	<input type="checkbox"/>
PMC Have ready complete management prospecting kit	_____	<input type="checkbox"/>
MC Conduct thorough inspection of property noting all features directly to appraisal form	_____	<input type="checkbox"/>
MC Discuss Company 'irresistible' leasing and management service with property owner working through the management prospectus	_____	<input type="checkbox"/>
MC Explain the STAT™ and DEMO™ and inform property owner of anticipated appraised rental amount if confident of accurate evaluation at time of appraisal	_____	<input type="checkbox"/>
MC Explain Company unique service and quality standards, policies, procedures Promises, comparisons to average market achievements, results	_____	<input type="checkbox"/>
MC Work through the Management Contract with the property owner request signature and commitment	_____	<input type="checkbox"/>
MC Discuss advertising/marketing plan and have property owner sign agreed advertising with payment	_____	<input type="checkbox"/>
MC Request property owner to sign 'Property Preparation: Compliance and Safety Verification' Form	_____	<input type="checkbox"/>
MC Request a copy of the latest local City/Council notice	_____	<input type="checkbox"/>
MC Request a copy proof of current insurance and discuss necessary insurance	_____	<input type="checkbox"/>
MC Discuss Point Central digital locks and seek instructions for installation	_____	<input type="checkbox"/>

- MC** Discuss and seek instructions on smoke detector and safety switch maintenance/compliance _____
- MC** Discuss and seek instructions on water compliance _____
- MC** Discuss and seek instructions on pool compliance _____
- MC** Discuss and seek instructions on carbon monoxide monitoring compliance _____
- MC** Photograph property (NB: Preference is for professional photography) _____
- MC** Recommend installation of digital lock (if not already installed) and/or _____
- MC** Request keys (both management and at least 2 full sets for tenant/s) _____
- MC** Tag keys immediately (even if digital locks installed) _____
- MC** Recommend installation of digital energy _____
- MC** Recommend installation of property drug detector unit _____
- MC** Erect 'Rent Me' sign _____

- MC/PMC** Follow TrackMate™ for New Management _____

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

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