

Property Management Owner Checklist



✉ Documentation

- Copy of Owners Driver's License
- Electronic copy of the HOA Rules & Regulations (if the property is located within an HOA)
- Insurance COI (Certificate of Insurance) **showing Brick & Mortar Properties LLC as "additionally insured" or "Additional Interest"**. Liability at min. of \$500,000 Contact your insurance agent and make this request, send an electronic copy to your property manager.
- Owner statement will be emailed monthly, provide email address. (Video tutorial on how to read the owner statement: <https://www.loom.com/share/cc9e67a495e34ca5b04d7d06a9d5c4c8>)
- Owner distribution will be sent via ACH (direct deposit) payments are made directly into a checking, savings or money market account (please provide a voided check or image of a voided check and indicate if it is a checking, saving or money market account)
- Set up fee (\$200) and Owner Reserve (\$500) *will be withheld from the first month's owner distribution.*

✉ Keys and manuals

- House Keys: 3 sets (2 will go to the new tenant, 1 will be retained by us). If the property is occupied by tenants, please provide us with 1 key.
- Garage Remotes: Please place 2 working remotes in the kitchen drawer closest to the refrigerator.
- Leave operation manuals for appliances, security systems, thermostats, etc. in the kitchen drawer closest to the refrigerator.
- Pool/Clubhouse (if applicable). Please leave these keys in the kitchen drawer closest to the refrigerator.

✉ Utilities

- Water/sewer: Please indicate who is responsible for the water bill charges, owner or tenant.

✉ Rent ready condition

- We expect tenants to return the home to us in the same condition we deliver it to them. Getting the home professionally cleaned and carpets professionally cleaned prior to the tenancy is expected.
 - Interior paint: We may advise a fresh coat of paint prior to tenant occupancy.
 - Safety: all smoke detectors, Co2 detector functional.
 - All mechanical items and components in working order (i.e. oven burners, light bulbs).
 - No personal property left at the property (i.e. lawn mower, snow blower, cleaning products).
- *We are happy to coordinate with getting the property in rent-ready condition with our verified and trusted vendors for a project management fee.

✉ If currently tenant occupied

- Tenant Name, phone number, email address
- Current Lease
- Tenant Security Deposit

