



**PROPERTY  
UPSURGE**  
Masters In Management

**MANAGEMENT  
AGREEMENT  
CHECK LIST**

**I - OWNER INFORMATION**

Client Name: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip Code: \_\_\_\_\_

Phone (H): \_\_\_\_\_

Email (E): \_\_\_\_\_

\*Complete "W-9" Form for new owners

**II - PROPERTY INFORMATION**

Single Family

Condo

Apartment Building

Commercial

Building

Property Address: \_\_\_\_\_

City, State, Zip Code: \_\_\_\_\_

Bedroom(s): \_\_\_\_\_ Bathroom(s): \_\_\_\_\_ Sq Ft: \_\_\_\_\_

Unit Mix: \_\_\_\_\_

Zoning: \_\_\_\_\_

Property Info \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**III - KEYS & ITEMS**

Entry Key qty \_\_\_\_\_ Mail Key qty \_\_\_\_\_ Pool Key qty \_\_\_\_\_ Garage Door Opener qty \_\_\_\_\_

\_\_\_\_\_ qty \_\_\_\_\_ \_\_\_\_\_ qty \_\_\_\_\_ \_\_\_\_\_ qty \_\_\_\_\_

**IV - RECURRING MAINTENANCE NEEDED**

POOL      GARDENING      SOLAR      SEPTIC TANK      GATE      SECURITY

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**V - BILL PAY**

HOA      INSURANCE      ALARM      WATER      ELECTRIC      GAS  
TRASH      POOL      GARDENER      SOLAR      GATE      SECURITY

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\*Complete a "Bill Pay Form" for each bill that is checked above that needs to get paid by us.

**VI - EXISTING TENANTS INFO**

Tenants Name: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

City, State, Zip Code: \_\_\_\_\_

Phone (H): \_\_\_\_\_

Email (E): \_\_\_\_\_

Recurring Rent Amount: \$ \_\_\_\_\_ Security Deposit Held: \$ \_\_\_\_\_

Other Recurring Charge: \$ \_\_\_\_\_ / \_\_\_\_\_

Outstanding Balance: \$ \_\_\_\_\_ as of \_\_\_\_\_

**VII - DOCUMENTS NEEDED**

Insurance Policy Info

Agent Name: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Copy of Existing Lease Agreements and Addendums      Owner Contribution Form      W-9 Form

Warranty Information

Roof      HVAC      Appliances      \_\_\_\_\_

Bill Pay Forms (from step V if applicable)      Signed Management Agreement      Utility

Authorization

# GUARANTEE

## SATISFACTION GUARANTEE

If you're unhappy for any reason please let us know so we can address your concerns, but if we can not, we will let you out of the management agreement with no penalty or hoops to jump through.

## TENANT PLACEMENT GUARANTEE

If we place a tenant that leaves or needs to be removed during the first year term of their lease, we will find you a qualified replacement tenant with no additional leasing fees. Also, we guarantee a tenant within 30 days of hiring us or our leasing fee is FREE.

## BEST VALUE GUARANTEE

Anyone can make a service cheaper by cutting corners and pricing it for less. Many first time landlords shop by price and then hope they get the service they desire. Over the long run, a great manager who applies insight and care may cost you a few bucks more per month but saves you thousands over time in lost rent, vacancy, maintenance problems, turn time and property deteriorations.

## 24-HOUR RESPONSE GUARANTEE

We hear consistently how hard it is to get other managers to just return calls and emails. With us, you can rest assured that you'll hear from us within a 24 hour period. We're here to serve you.

## OUR EXPERTISE CAN'T BE BEAT

We've been in the business for twenty three plus years and have the expertise & knowledge to protect the value of your property. We're your trusted partners and are here to discuss all your real estate investment needs.