



NEW OWNER CHECKLIST

Owner:

Date:

Address:

This checklist is a tool to help clients with the onboarding process. These few items are essential to prepare your file. A SunWorld Admin Specialist will be in touch to help complete the total package. If there is any information missing or necessary specific to your property our staff will be in touch. If at any time you have questions do not hesitate to contact us.

➤ **Items Required to Start Management with SunWorld Group Property Management**

- ☐ Completely Signed Management Agreement & Addendums
- ☐ Copy of ID
- ☐ Copy of Voided Check
- ☐ Social Security Number or Tax ID
- ☐ Completed Property Information Sheet
- ☐ Initial Contribution to Client Trust Account

Total: _____

Additional funds may be needed for rent-ready work

➤ **Items Needed Before Marketing Can Begin**

- ☐ Appointment with SunWorld for Marketing Pictures

➤ **Items Needed Within 5 Business Days of Management**

- ☐ Provide Keys and Remotes
- ☐ HOA CC&Rs & Rules and Regulations
- ☐ Proof of Insurance

(Landlord/Tenant policy which lists SunWorld as additional insured with liability limit of \$1 million)

➤ **SunWorld to Complete the Following Necessary for Every Home Under Management**

- ☐ SunWorld Vender to Re-Key All Locks Before a Tenant is Placed & In-Between Tenancies.
(Legal Requirement for Safety)

Vancouver:

Mailing Address:

9901 NE 7th Ave C-119

Vancouver, WA 98685

Telephone/ 360-874-0210

Fax/ 360-838-4634

Longview:

Mailing Address:

1220 Ocean Beach Highway

Longview, WA 98632

Telephone: 360-353-4018

Fax: 360-838-4634

*Terms and conditions apply; subject to change, available at www.sunworldgroup.com

Onboarding Property Checklist

The following items are required (you only need to fill in 1 of the 3 choices below)

Tenant Occupied Rent Ready

Please provide SunWorld with the following:

1. Has change of management notice been served? ☐ Yes ☐ No
 Date of notice delivery? _____ via _____
 Date SunWorld management to start? _____
2. Tenant application & ID ☐ Yes ☐ No
3. Tenant rental agreement ☐ Yes ☐ No
4. Tenant ledger ☐ Yes ☐ No
5. Outstanding maintenance requests ☐ Yes ☐ No
6. Provide copy of keys # _____ ☐ Yes ☐ No

Owner Occupied Rent Ready

- | | | | |
|--|------------------------------------|------------------------------------|--|
| 1. Professional house cleaning | <input type="checkbox"/> Scheduled | <input type="checkbox"/> Completed | <input type="checkbox"/> Invoice Submitted |
| 2. Professional carpet cleaning | <input type="checkbox"/> Scheduled | <input type="checkbox"/> Completed | <input type="checkbox"/> Invoice Submitted |
| 3. Furnace inspected & serviced as needed | <input type="checkbox"/> Scheduled | <input type="checkbox"/> Completed | <input type="checkbox"/> Invoice Submitted |
| 4. HVAC inspection (cleaning/change filters) | <input type="checkbox"/> Scheduled | <input type="checkbox"/> Completed | <input type="checkbox"/> Invoice Submitted |
| 5. Chimney/wood stove inspected & cleaned | <input type="checkbox"/> Scheduled | <input type="checkbox"/> Completed | <input type="checkbox"/> Invoice Submitted |
| 6. CO detectors installed & functional | <input type="checkbox"/> Installed | Date: _____ | |
| 7. Smoke detectors installed & functional | <input type="checkbox"/> Installed | Date: _____ | |
| 8. Functional light bulbs in all fixtures | <input type="checkbox"/> Installed | Date: _____ | |
| 9. Repair holes in walls & paint as needed | <input type="checkbox"/> Scheduled | <input type="checkbox"/> Completed | |
| 10. Re-caulking by sinks as needed | <input type="checkbox"/> Scheduled | <input type="checkbox"/> Completed | |
| 11. Landscaping during vacancy | <input type="checkbox"/> Scheduled | <input type="checkbox"/> Completed | |
| 12. Change locks | <input type="checkbox"/> Installed | Date: _____ | |
| 13. Blinds (sleeping areas/bedrooms) | <input type="checkbox"/> Installed | Date: _____ | |
| 14. Forward mail | | <input type="checkbox"/> Completed | |
| 15. Utilities (water/sewer, electric & gas remains on; trash should be canceled) | | <input type="checkbox"/> Completed | |

Vacant Rent Ready

- | | | | |
|---|------------------------------------|------------------------------------|--|
| 1. Professional house cleaning | <input type="checkbox"/> Scheduled | <input type="checkbox"/> Completed | <input type="checkbox"/> Invoice Submitted |
| 2. Professional carpet cleaning | <input type="checkbox"/> Scheduled | <input type="checkbox"/> Completed | <input type="checkbox"/> Invoice Submitted |
| 3. Furnace inspected & serviced as needed | <input type="checkbox"/> Scheduled | <input type="checkbox"/> Completed | <input type="checkbox"/> Invoice Submitted |
| 4. HVAC inspection (cleaning/filter change) | <input type="checkbox"/> Scheduled | <input type="checkbox"/> Completed | <input type="checkbox"/> Invoice Submitted |
| 5. Chimney/wood stove inspected & clean | <input type="checkbox"/> Scheduled | <input type="checkbox"/> Completed | <input type="checkbox"/> Invoice Submitted |
| 6. CO detector installed & functional | <input type="checkbox"/> Installed | Date: _____ | |
| 7. Smoke detectors installed & functional | <input type="checkbox"/> Installed | Date: _____ | |
| 8. Functional light bulbs in all fixtures | <input type="checkbox"/> Installed | Date: _____ | |
| 9. Repair holes in walls & paint as needed | <input type="checkbox"/> Scheduled | <input type="checkbox"/> Completed | |
| 10. Re-caulking sinks as needed | <input type="checkbox"/> Scheduled | <input type="checkbox"/> Completed | |
| 11. Landscaping during vacancy | <input type="checkbox"/> Scheduled | <input type="checkbox"/> Completed | |
| 12. Change locks | <input type="checkbox"/> Installed | Date: _____ | |
| 13. Forward Mail | | <input type="checkbox"/> Completed | |
| 14. Utilities (water/sewer, electric & gas remain on; trash should be canceled) | | <input type="checkbox"/> Completed | |

Owner Signature: _____ Date: _____