OWNER'S ONBOARDING CHECKLIST

|  |  |
| --- | --- |
| **STEP 1:** | COMPLETED |
| • Review: FAQs, Rental Preplist, Management Agreement & Menu of Services (NestManagers..com) | o |
| • Complete a Consultation either on the phone or In Home to determine compatibility. | o |
| • Complete and return the Owner Information Form | o |
| • Email a copy of ID's for each property owner | o |
| **STEP 2:** | COMPLETED |
| • Review and sign the Property Management Agreement and all corresponding Property Information Forms which will be emailed from the administrative team. | o |
|  |  |
| **STEP 3:** | COMPLETED |

* Utilizing the Rental Preplist prepare your NEST to the best of your abilities
* Schedule the initial move in- inspection with our team. They will reach out once step 1 & 2 are completed
* Nest will share the inspection date with you once the home is vacant
* Review Inspection report and work with maintenance team to create a Turnover Plan
* Turnover will be managed by: Ownero

NESToWork to begin when home is vacant, See Menu of Services for turnover pricing

Home will be tenant ready by: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (date required to begin advertising)

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* Make an on-line contribution to the Client Trust Account

|  |  |  |
| --- | --- | --- |
| o | Set up fee: | $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| o | Turnover estimates: | $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Work will begin once collected) |
| o | TOTAL | $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

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**STEP 4 (if applicable):**

* Submit 1 set of digital HOA documents to NEST.
* Leave a 2nd printed copy of the HOA documents in a binder, in the NEST
* Provide NEST with a copy of any contracts
* Fill the oil or propane tanks - provide receipt to NEST
* Provide copies of the following for each *occupied* unit:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  | Unit \_\_\_\_\_\_\_\_\_ | Unit \_\_\_\_\_\_\_\_\_ | Unit \_\_\_\_\_\_\_\_\_ |
| o | Lease | o | o | o |
| o | Tenant Applications | o | o | o |
| o | Tenant IDs | o | o | o |
| o | Security Deposits | o | o | o |
| o | Contact Information | o | o | o |
| o | Tenant Ledger | o | o | o |

|  |  |
| --- | --- |
| COMPLETED | N/A |
| o | o |
| o | o |
| o | o |
| o | o |
| o | o |

|  |  |  |
| --- | --- | --- |
| **STEP 5:** | | COMPLETED |
| • Professional marketing photos: Scheduled once home is vacant and photo ready | | o |
| • Inform all utility companies that the home will be a rental – kept on until a tenant moves in | | o |
| • Provide Proof of Insurance: NEST listed as additional insured with liability limit of 300K | | o |
| • Forward mail - Don't forget the County/State/City (tax documents) | | o |
| • | **Listing goes live!** | o |

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