

NEW OWNER WORKSHEET

Owner(s): _____
Contact name: _____ Contract Start: _____ End: _____
Tax ID: _____ 1099 Eligible: ____y____n
Routing number: _____ Account number: _____
Billing Address: _____
Email: _____ Phone: _____ Phone: _____

Property Information

Street Address: _____ City: _____ State: _____ Zip: _____ Unit _____
Year Built: _____ Insurance Co: _____ Policy #: _____
County: _____ Subdivision: _____ HOA: _____
Minimum Rent _____ Sqft _____ Date Available: _____
Directions: _____

Description: _____

Circle one: Single family Condo Duplex Triplex Apartment Mobile Home Other
Stories: _____ Total Rooms: _____ Bedrooms: _____ Full Baths: _____ Half Baths: _____
Driveway Type: _____ Garage Spaces: _____ Carport Spaces: _____ Parking Spaces _____
Flooring: _____ Appliances inc: _____
Fireplaces: _____ Pets: _____ Smoking: _____ Fence: _____ Heat/Air: _____
Water Type: _____ Cooling Source: _____ Heat Source: _____
Sewer Type: _____ Gas: _____
Utilities paid by: _____
Other items owned by owner on property: _____
Other services paid by owner: _____
Other services paid by tenant: _____

REQUIRED ITEMS TO BRING WITH YOU

- At least two sets of keys
- Canceled check from account to be used for payments
- Insurance documentation
- Copy of current lease for existing tenants
- HOA documentation
- W-9
- Pool passes, garage door openers, storage keys, etc
- Decent photos if you have any
- Serial numbers to any appliances, tv, etc. remaining inside unit
- This form completely filled out to the best of your knowledge