**Blue Sage Property Management, Inc, CRMC®**

Checklist for New Owner

1. Property management agreement: signatures
2. The law of Real Estate Agency: initials
3. Lead based paint forms: required if it’s older than 1978
4. W-9 form: fill out, sign
5. Insurance letter: fill out, sign
6. Maintenance request list (repeating annual maintenance items)
7. Automated payments (optional): fill out, add voided check & sign
8. Property checklist: fill out the top half, the bottom half is optional (we can do it for you)
9. Check for $300.00 to open your account. This is not a fee; you will see a credit on your statement.
10. Keys
11. HOA rules and regulations, if applicable.

1. **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

If currently rented, we also need:

1. Lease, application and move in forms
2. Contact information for current tenants
3. Tenants’ security deposit
4. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Some initial things that we will be doing:

1. If vacant:
   1. Visit the property
   2. Confer with you regarding condition
   3. Change the utility bill to our office as default
   4. When rented, change utilities to tenant
2. If occupied:
   1. Visit the property and the tenant
   2. Confer with you regarding condition
   3. Sign new lease, if possible
3. If putting it on the market
   1. Confirm rental rate with you
   2. Take marketing pictures
   3. Enter listings
   4. Put up sign & lockbox

Please deliver the items to: Kathryn MacGeraghty

Kathryn@BlueSageRentals.com

Blue Sage Property Management, Inc

PO Box 2116, Sequim WA 98382 < mail to

441 W Washington Ave, Sequim WA < delivery

***Thank you for using Blue Sage!***

## **Owner Information**

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

**Name**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Best Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Mailing Address:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Alt Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Email(s): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

HOA Mgmt Co: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

What tenant info does the HOA require? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### **Rental Preferences**

Rented currently? YES ☐ NO ☐ Type of property: SF ☐ Condo ☐ Apts ☐ Mobile ☐

Preferred lease length? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ months **Desired Rental amount: $\_\_\_\_\_\_\_\_\_\_\_**

Cats: YES ☐ NO ☐ Big dogs: YES ☐ NO ☐ Small dogs: YES ☐ NO ☐ What is small? \_\_\_\_\_\_\_\_\_\_\_\_\_

### **Who Pays?**

**Water**: Owner ☐ Tenant ☐ HOA ☐ **Electric**: Owner ☐ Tenant ☐ **Propane**: Owner ☐ Tenant ☐

**Garbage**: Owner ☐ Tenant ☐ HOA ☐ Day? \_\_\_\_\_ Location of mailbox: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### **Property Description for** **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

## ***Interior***

Number of bedrooms: \_\_\_\_\_\_\_\_\_ Number of baths: \_\_\_\_\_\_\_\_\_\_ Number of levels: \_\_\_\_\_\_\_\_

Square feet: \_\_\_\_\_\_\_\_\_\_\_\_ Community Amenities: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Views? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Basement: YES ☐ NO ☐ Finished? YES ☐ NO ☐ Walk Out: YES ☐ NO ☐

Type of heat: Forced Air ☐ Boiler ☐ Baseboard ☐ Heat pump ☐ Fireplace? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Air conditioning: YES ☐ NO ☐ Wheelchair Accessible? ☐

Type of flooring:

Entry \_\_\_\_\_\_\_\_\_\_\_\_ Bedroom \_\_\_\_\_\_\_\_\_\_\_\_ Kitchen \_\_\_\_\_\_\_\_\_\_\_\_ Bath \_\_\_\_\_\_\_\_\_\_\_\_ Living \_\_\_\_\_\_\_\_\_\_\_\_

Windows: Double Pane? ☐ Storm Wins? ☐ Coverings \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Oven: Electric ☐ Self Cleaning ☐ Propane ☐

Washer/Dryer: Hookups ☐ Included ☐ On Site ☐ Full Size ☐

Dining: Separate ☐ Dining/Living ☐ Eat in Kitchen ☐ Breakfast Bar ☐

Kitchen: Frig ☐ Microwave ☐ Disposal ☐ Dishwasher ☐

## ***Exterior***

Parking structure: 0 1 2 3 Attached YES ☐ NO ☐ Garage / Carport RV Parking ☐

Additional parking? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Yard: YES ☐ NO ☐ Fenced: YES ☐ NO ☐ Sprinkler system: YES ☐ NO ☐

Open Space ☐ Backs to Open Space ☐ Extra Storage

Where is the? Electrical Panel: \_\_\_\_\_\_\_\_\_\_\_\_ Water shutoff: \_\_\_\_\_\_\_\_\_\_\_\_ Sprinkler controls: \_\_\_\_\_\_\_\_\_\_\_\_

### Year built: \_\_\_\_\_\_\_\_ Year renovated: \_\_\_\_\_\_

Items needing attention: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Comments: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# **Blue Sage Property Management, Inc, CRMC®**

Recurring or Scheduled Maintenance Request List

**Address**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ DIY? YES ☐ NO ☐ Condo? YES ☐ NO ☐

# **Fall Activities**

Our annual interior check (smoke detectors, plumbing, general cleanliness) is at no charge to you. The following items, if checked, may involve a vendor charge. By batching all properties, there should be substantial savings.

☐ Gutter cleaning

☐ Exterior water turn off

☐ Service furnace

☐ Fertilization

☐ Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# **Spring Activities**

The following items, if checked, may involve a vendor charge.

☐ Gutter cleaning

☐ Service air conditioner

☐ Fertilization & weed control

☐ Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# **Summer Activities**

The following items, if checked, may involve a vendor charge. Irregular drive-by’s are at no charge. We don’t normally send you a report, but do write the tenants if the yard isn’t looking good. Tenants receiving 2nd violations may get professional gardening services, at their expense.

☐ Fertilization

☐ Aeration

☐ Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### **Insurance Agency Letter**

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

To: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

RE: Additional Insured on Policy #\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Property Addresses: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

To whom it may concern,

Please be informed that Blue Sage Property Management, Inc. is managing the property located at the address above.

Blue Sage Property Management, Inc. is requiring that, upon our signing of the Residential Property Management Agreement, they be listed as an additional insured on our policy and a copy be sent to them at:

Blue Sage Property Management, Inc Phone: 360-406-5252

PO Box 2116

Sequim, WA 98382 Sarah@BlueSageHomes.com

Should you have any questions or concerns regarding this matter, please feel free to contact me at anytime.

Sincerely,

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ signature

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ print