

TRANSFER MANAGEMENT CHECKLIST

PROPERTY ADDRESS		
Owner Surname	Tenant Surname	
Email	Email	
Mobile	Mobile	
Date Received	Type of Management	
Property Manager	Management Fee (%)	Other fee's:

Management Agreement Received	Date Completed	Completed By
Management Agreement signed or assigned with letter		
Enter owner and property details into software		
Acknowledgement Form, Cover letter & Management Agreement sent to owner		

Transfer from other Agent/Lessor	Date Completed	Completed By
Termination letter from owner sent to previous agent		
Notice of termination sent to previous agent		
Date file is to be collected		
Tenant file set up in software		
Tenant ledger emailed to Admin		
Intro letter, tenant ledger and PM business card sent to tenant		
Bond Transfer completed		

Documents to collect form other agent	Date Completed	Completed By
Copy of the current Tenancy Agreement		
Copy of old Management Agreement		
Copy of final statement issued to owner		
Copy of Transfer Agent letter to Tenant		
Copy of the Condition Report		
The contact numbers for the tenants		
Application Forms for the current tenants		
The "paid to" date for the rent		
The ledger of the current tenants payment history		
All keys to the property held		
Print out of notes from PM software		
Digital photography/vacancy descriptions		
Details of the Landlords Insurance policy		
Notices (current and previous)		
Small Claims Tribunal Documents		
Body Corp By-laws (if applicable)		
Routine Inspection Reports		
A copy of Bond Lodgement Form		

All Current & Pending Maintenance		
Outstanding Insurance Claims/Complaints		
Status Smoke Alarms		
Status of Insulation		

Management Fee as per New Agreement or Per Assigned Fee's _____ %	Weekly Rent as per Tenancy Agreement \$ _____
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Other fee's: _____

Do you pay any recurring accounts on behalf of this owner?

	Rates
	Landlord Insurance
	Body Corporate Levies
	Pool / Lawn Maintenance <i>(Circle which is applicable)</i>
	Annual Pest / Gutter Inspection <i>(Circle which is applicable)</i>

Are there any accounts which have not been paid?

No	Yes – <i>(please attach)</i>
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Prepared on behalf of:		Received on behalf of:	
By:	Date:	By:	Date: