

## TENANT FILE CHECKLIST

### **OWNER/PROPERTY MANAGEMENT FORMS:**

- Owner Information Worksheet (*Select Homes form*)
- Property Management Agreement (*C.A.R. form PMA*)
- Lease Listing Agreement (*C.A.R. form LL*)
- Disclosure Regarding Real Estate Agency Relationship (*C.A.R. form AD*)
- Copy of Welcome Letter & Initial Account Set-up (*Kelly*)

### **NEW TENANT FORMS:**

- Application to Rent/Screening Fee (*C.A.R. form LRA*)
- Rental application verification form or Rental Qualifier
- Residential Lease or Month-to-Month Rental Agreement (*C.A.R. for LR*)
- Policies and Rules Addendum (*C.A.R. form ADM - see Kelly for sample verbiage*)
- Animal Agreement Addendum (*if applicable*) (*C.A.R. form ADM - see Kelly for sample verbiage*)
- Move In/Move Out Inspection (*C.A.R. form MIMO*)
- Lease/Rental Mold and Ventilation Addendum (*C.A.R. form LRM*)
- Water Heater and Smoke Detector Statement of Compliance (*C.A.R. form WHSD*)
- Disclosure Regarding Real Estate Agency Relationship (*C.A.R. form AD*)
- Copy of Tenant Information letter (move-in letter)

### **For properties built before 1978, federal law required the following:**

- Lead-Based Paint and Lead-Based Paint Hazards (*C.A.R. form FLD*)
- "Protect Your Family From Lead in Your Home" pamphlet (from federal EPA)
- Gave to tenant(s) on \_\_\_\_\_.

### **TENANT MOVE-OUT FORMS:**

- Tenants notice of intent to vacate rental unit
- Copy of Move-out information letter (*Select Homes form*)
- Notice of Right to Inspection Prior to Termination of Tenancy (*C.A.R. form NRI*)
- Tenant's Waiver of Right to Receipts and Invoices (*Select Homes form*)
- Pre-Move Out Inspection Statement (*C.A.R. form PMOI*)
- Security deposit itemization form/letter (*Kelly*)
- Completed Move Out Inspection (*C.A.R. form MIMO*)

<b>Move-Out Date:</b>
<b>Discard After: (3 years)</b>



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### PROPERTY MANAGEMENT INFORMATION

<b>Property Information:</b>		<b>Chase Bank Acct #:</b>	
<b>Address:</b>			
<b>City:</b>	<b>State:</b>	<b>Zip:</b>	
<b>Management Fees:</b>			
<b>Mailing Address:</b>			
<b>City:</b>	<b>State:</b>	<b>Zip:</b>	

<b>Tenant Information:</b>		<b>Move-In Date:</b>	
<b>Name(s):</b>			
<b>Hm Phone:</b>	<b>Wk Phone:</b>		
<b>Cell Phone:</b>	<b>Email:</b>		
<b>Drivers License #:</b>	<b>Car License Plate #:</b>		
<b>Rent: (per month)</b>	<b>Term:</b>		
<b>Security Deposit:</b>	<b>Other Deposit:</b>		
<b>Emergency Contact:</b>			
<b>Name:</b>		<b>Phone:</b>	
<b>Address:</b>			

<b>Owner Information:</b>		
<b>Name(s):</b>		
<b>Address:</b>		
<b>City:</b>	<b>State:</b>	<b>Zip:</b>
<b>Hm Phone:</b>	<b>Wk Phone:</b>	
<b>Cell Phone:</b>	<b>Email:</b>	