

# Property Mgmt Checklist

## Property Management Checklist Worksheet

This worksheet is designed to help you stay organized and efficient in managing rental properties. It covers all essential tasks from tenant screening to maintenance and financial management, ensuring smooth operations and maximizing returns on your investment.

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### Property Information

Property Address:

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Property Type (Single-Family, Multi-Family, Condo, etc.):

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Number of Units (if applicable):

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### Tenant Screening Checklist

#### Tenant Information

Tenant Name(s):

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Move-in Date:

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Lease Term (months):

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#### Screening Process

1. **Rental Application Received**

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

2. **Credit Check**

Credit Score: \_\_\_\_\_

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

3. **Background Check**

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

4. **Employment Verification**

Employer: \_\_\_\_\_

Monthly Income: \_\_\_\_\_

5. **Previous Landlord References**

Landlord Name: \_\_\_\_\_

Contact Info: \_\_\_\_\_

Feedback: \_\_\_\_\_

6. **Final Decision**

Accepted, Rejected

Date of Decision: \_\_\_\_\_

7. **Security Deposit Received**

Amount: \_\_\_\_\_

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

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**Lease Management**

**Lease Start Date**

\_\_\_\_\_

**Lease End Date**

\_\_\_\_\_

**Rent Amount (Monthly)**

\_\_\_\_\_

**Security Deposit Amount**

\_\_\_\_\_

**Renewal Date**

\_\_\_\_\_

**Lease Terms Summary (Key Clauses)**

\_\_\_\_\_

\_\_\_\_\_

**Rent Collection & Financial Management**

**Monthly Rent Due Date**

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**Late Payment Fees (if applicable)**

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**Rent Payment Methods (Online, Check, etc.)**

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**Monthly Rent Collection Tracker**

Month	Rent Received (Yes/No)	Amount Received	Date Received	Late Fees (if any)	Notes
January					
February					
March					
April					
May					
June					
July					
August					
September					
October					
November					
December					

**Annual Rent Collection Summary**

Total Rent Collected: \_\_\_\_\_

Total Late Fees Collected: \_\_\_\_\_

Total Missed Payments: \_\_\_\_\_

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**Maintenance and Repairs**

**Maintenance Contacts**

Property Manager (if applicable): \_\_\_\_\_

Contact Info: \_\_\_\_\_

Primary Contractor: \_\_\_\_\_

Contact Info: \_\_\_\_\_

Plumber: \_\_\_\_\_

Contact Info: \_\_\_\_\_

Electrician: \_\_\_\_\_

Contact Info: \_\_\_\_\_

HVAC Technician: \_\_\_\_\_

Contact Info: \_\_\_\_\_

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**Maintenance Schedule**

Maintenance Task	Frequency	Last Performed	Next Due Date	Notes
HVAC Inspection	Annually			
Smoke Detector Battery Check	Semi-Annually			
Plumbing Inspection	Annually			
Roof Inspection	Annually			
Pest Control	Quarterly			

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**Repair Log**

**Date Issue Reported Repair Description Cost Completed By Notes**

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## Move-In/Move-Out Inspection Checklist

### Move-In Inspection

#### 1. Condition of the Property

- Walls: \_\_\_\_\_
- Floors: \_\_\_\_\_
- Appliances: \_\_\_\_\_
- Windows/Doors: \_\_\_\_\_
- Plumbing: \_\_\_\_\_
- HVAC: \_\_\_\_\_
- Other: \_\_\_\_\_

#### 2. Tenant Signature

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

Signature: \_\_\_\_\_

### Move-Out Inspection

#### 1. Condition of the Property

- Walls: \_\_\_\_\_
- Floors: \_\_\_\_\_
- Appliances: \_\_\_\_\_
- Windows/Doors: \_\_\_\_\_
- Plumbing: \_\_\_\_\_
- HVAC: \_\_\_\_\_
- Other: \_\_\_\_\_

#### 2. Damage Identified

Description: \_\_\_\_\_

#### 3. Deposit Deduction (if applicable)

Amount: \_\_\_\_\_

Reason: \_\_\_\_\_

#### 4. Tenant Signature

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

Signature: \_\_\_\_\_

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**Legal and Compliance**

**Insurance Information**

Property Insurance Provider: \_\_\_\_\_

Policy Number: \_\_\_\_\_

Coverage Details: \_\_\_\_\_

Policy Renewal Date: \_\_\_\_\_

**Licensing and Permits (if applicable)**

Business License Number: \_\_\_\_\_

Permit Expiration Date: \_\_\_\_\_

**Compliance with Local Regulations (e.g., Rent Control, Fair Housing Laws)**

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

Changes or Updates: \_\_\_\_\_

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**Emergency Preparedness**

**Emergency Contacts**

Fire Department: \_\_\_\_\_

Police: \_\_\_\_\_

Emergency Maintenance Contact: \_\_\_\_\_

**Emergency Procedures**

Fire Evacuation Plan: \_\_\_\_\_

Flood/Water Damage Plan: \_\_\_\_\_

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

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**Property Management Summary**

**Overall Property Condition**

Excellent, Good, Fair, Poor

**Tenant Satisfaction**

Excellent, Good, Fair, Poor

**Current Occupancy Rate**

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**Areas for Improvement**

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