

2016

Pre-Opening Manual

MANAGEMENT ONE LICENSED OPERATING SYSTEMS
KNOWLEDGE BASED MANUAL

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Opening Your New Management Office

Opening Your NEW PROPERTY MANAGEMENT OFFICE

Shortly after signing your Agreement, you will have a meeting with a representative from the Management One Licensed Operating Systems (*MOLOS*) office to review this Pre-Opening Workbook.

It will be your guide for completing the many things you must do before opening your new office location, including your proforma (an excel file) and shopping your competition (an excel file).

These Excel files will be emailed to you for your convenience. If you have questions regarding any items in this workbook, call the corporate office.

We recognize that your success is our success... so let's get started!

Setting up Your Business

Before opening various bank accounts and filing for various permits and licenses, etc., you must first determine the legal structure for your Your Business. When beginning a business, you must decide what form of business entity to establish. Your form of business determines the amount of regulatory paperwork you have to file, your personal liability regarding investments into your business, and the taxes you have to pay. You may need to contact several federal agencies as well as your state and local business entity registration office.

- Examples of various legal entities: Individual/Sole Proprietor
- Limited Liability Company ("LLC")
- Corporation ("S" Corp; "C" Corp)
- Partnership

Seek the advice of your CPA & attorney for accounting and legal advice on the best structure for you.

Arrange Financing

Any conventional bank, commercial lender or leasing source you choose is acceptable.

To Lease or Buy?

Lease financing has become a popular tool for many businesses, eliminating large outlays of cash required for outright purchases. Some plans may not require any money down.

Your equipment investment should not be large, but compare the potential tax savings from leasing to those of buying the equipment outright. These possible savings apply to both new and used equipment. **See your accountant** for current rulings to be sure your potential lease financing will qualify for tax write-offs.

If your start-up capital is limited, you should explore leasing as an alternative. With leasing, your initial cash outlay can be significantly less than buying on installments. The disadvantage: If you have a legitimate tax-deductible lease, you do not acquire equity in your equipment, and therefore, do not build up your balance sheet. A financial statement showing a strong net worth is important to any business. In addition, the total cost of leasing over a period of years is higher than if the same items were purchased.

Remember that your local County Tax Collector may have a Business Personal Property tax that may be assessed on your capital equipment, inventory and leases. Taxes may be assessed differently on leases vs. assets. Consult your accountant for any advice on this option.

Locate a suitable Market Area

Choosing the right market for your office is critical. You should do this **BEFORE** evaluating any office location.

Location can be very important for visibility and walk-in traffic. However, it is not a necessity. Many property management companies have been very successful operating in small office complexes with little to no visibility. You can attract business through a well-defined, well targeted marketing program, without having to rely on a prominent office location. Evaluate the average rents being charged for the space you'll need for your office. In most cases, you should be able to find a very affordable location for the relatively small space to run your operation. Unless, you are managing over 1000 accounts, you should never need more than 6 employees. So if you plan on expanding from 1 to 3 or 4 employees during the first 3 years of your lease, you should consider a space large enough to accommodate that possibility.

Never accept a location because it is the only one available, or because it's inexpensive.

Factors to look for in choosing the market area to be serviced by your office:

- Types of shopping areas (corporate, hub, convenience, neighborhood)
- Commercial/retail mix, are vendors/subcontractors close by?
- Presence of national or corporate chains
- Estimated age, appearance and upkeep of other commercial properties. (i.e. is it a nice area?)
- Is the area growing? Lots of construction?
- Consumer profile -- size of population, age, occupation, income
- Age, density, estimated value, upkeep of closest residential area
- Number of non-owner occupied rental units in the area

Select an office site

- Visibility -- can the center and potential office site be seen?
Residents and owners will still have to come to your office to sign paperwork
- Accessibility in and out of the center -- easy or difficult?
- Parking (staff and customers) -- is there plenty or hardly enough?

Letter of Intent (LOI) and the Lease

Ask for a blank copy of the proposed lease beforehand when you submit your Letter of Intent, which is a non-binding offer to Lease. Carefully review it with your attorney.

What to look (out) for:

1. Rent

- a. NNN or Gross lease
- b. Price per square foot
- c. Time of lease/renewal term/require notices
- d. Cost of living increases
- e. Maintenance fees
- f. Obligation to participate in co-op Resident advertising

2. Will landlord assume or finance any resident improvements (TI's)?

3. Review center restrictions for signs Review Sign Criteria

- a. Sign on building, size and type, color – grand opening banners, posters in windows – center signs

Schedule walk-through

Schedule a walk-through of the property with your landlord to note defects and to review proposed improvements or renovations. The Corporate office can assist you in this regard.

Change locks

For previously occupied buildings either landlord or new office owner should change the locks.

Obtain property and liability insurance

You should discuss the coverage and limits with your insurance agent to determine whether additional insurance is needed. This coverage must be paid for, and in force before any construction may begin. Your Lease will require that.

The best form of general liability insurance for the small business consists of a comprehensive general liability policy combined with a comprehensive auto liability policy and standard workers' compensation policy.

Obtain Workers' Compensation insurance

As an employer, you are liable for injury to employees at work, caused by your failure to provide safe equipment and working conditions; to hire competent fellow employees, or to warn employees of an existing danger. In every state, an employer must insure against potential workers' compensation claims. Actual employee coverage and extent of the employer's liability vary.

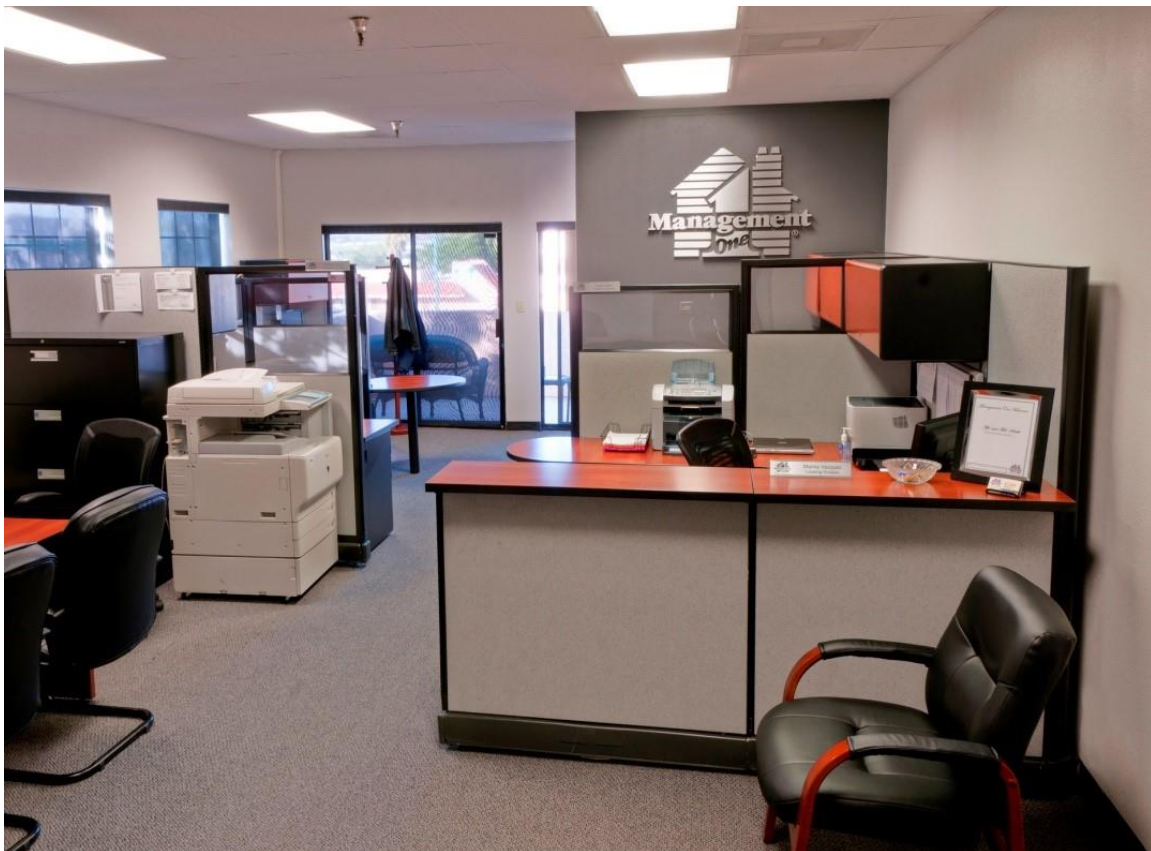
Hire an Architect & obtain site and fixture plans

Hire an architect to create your office drawings and plans. Your furniture and fixtures will influence the layout and feel of your office. Go over the Fixture Plan Checklist included below and discuss it with your corporate representative. It is of the utmost importance that this checklist be completed immediately upon obtaining your space and returned to the corporate office along with a "rough sketch" floor plan from your architect. If you have any questions concerning your fixture plan, please feel free to contact the Corporate Office as we can provide sample layouts for you.

EXAMPLE OF SET-UP REQUIREMENTS

Requirements are set forth below which may be amended or supplemented. Office Supplies will be approximately \$2200. Each Work station will be approximately \$2500. You can start with just a two work station set up and add on as you grow.

Sample Office Lay out of a 600 square foot office with 5 work stations and a conference room - See floor plan below



require other modifications. The more work needed to build your office, the more lead-time you need to allow.

Get at least three bids.

The Corporate office or another Management One® owner may recommend a reputable contractor. If a contractor is not recommended, check the reputation of each contractor by asking for references from previous jobs. Go and look at the work done to make sure it meets the standards required of a Management One® office. In reviewing the written bids, be certain that the total amount reflects all work that is necessary. If you are not going to install your equipment yourself, the bids need to include the price for installing office equipment (i.e. work stations, reception desk etc.). Remember that the cheapest bid is not always the best bid. Find out the total time that it will take the contractor to finish the job. Did the contractor meet deadlines on other jobs?

Obtain a written agreement as to costs and time commitments, if possible. This will allow you to plan better. It is your responsibility to see that all work proceeds on schedule.

Some general contractors will do the whole job; others will subcontract the work. Determine exactly which jobs the contractor and subcontractors will perform. If a general contractor hires "subs", he may charge more than if you contracted out the work yourself. Some areas require general contractors to obtain separate permits for subcontractors. If you are planning to do any of this work yourself, check with the city building inspector about permits required.

Delays

Anticipate delays! During the construction process, work may stop until a specific permit or approval is obtained. So expect a few, so you can still meet your opening day deadline.

Beware! Your electrician (or any other construction worker) may tell you not to worry about permits. Never agree to this... without the proper permits, you will not get your Final Inspection Approval, and the office cannot open. Worse, without a legal installation, all insurance is void.

Always insist that the general contractor provide proof of insurance. If he cannot give you an insurance binder, do not use his services. The Management One® office owner may be liable for any injuries or damages during construction. It is necessary to secure liability

insurance before construction begins, again with Management One listed as “additional insured.”

If the office space is “turn-key”, you may not need to hire any contractors at all and your suppliers (of work stations etc.) can do the entire install necessary without having to physically change the space at all.

Order office fixtures/furniture

Please allow 6-8 weeks for delivery of equipment.

Interlink Resource

Contact: Charlie Finkle

Phone: 949-500-4055

<http://modularlink.com/index.html>

Establish delivery date for equipment

Most of your office equipment (Furniture, Fixtures & Equipment “FF&E”) will need to be installed by your Vendor. Also, you will need to be at your office during delivery and you must have someone to help unload equipment. Make sure your equipment is delivered and installed in time for in-office training classes for your new staff.

Establish a bank account

Open a commercial bank account

Open a commercial Bank Account

Choose a bank that is interested in servicing (and financing) small businesses.) You can usually judge them by their eagerness to obtain your business account. Here are a few questions to ask your prospective banker to assist you in making your selection:

1. Is it necessary to maintain certain balances before the bank will consider a loan?

2. Will the bank give you a line of credit, and if so, what are the requirements?

3. Does the bank have limitations on the number of small loans it will grant or the types of businesses to which it will grant loans?

4. What is the bank's policy on the size of checks to be held for collection?

5. Will checks under that size be credited immediately to your checking account balance? (This question is very important, and you must press for a definite answer.)

If you do not have a previous business account for a reference, a few banks may hold all checks for collection until they develop experience with you. (Whether or not the bank exercises this precaution may depend on your personal credit rating.)

Credit Cards

Set up any company credit cards for this account at this time as well. You can apply for one at your local bank or you can apply for an American Express card. The AMEX is very flexible and valuable tool to help streamline your accounts payable process for your business. (not for property management accounting) Shop around to find the best interest rates, frequent flier miles and other "perks". There are many different options and rates on accounts.

Open a real estate trust account for your rents collected and a separate account for the security deposits

Check with your state department of real estate to ensure your bank is providing you with the correct account type (many trust accounts will be non-interest bearing). See examples below on how your trust accounts should appear. It is very important to ensure that each client for whom you hold funds in the trust account be guaranteed by the FDIC up to \$250,000 should the bank go out of business. These examples are not to be construed as an absolute, but only as an example, and you should consult with your Attorney and the bank to make sure each owner or resident in that trust account is guaranteed up to \$250,000 each.

Contact your bank to verify if they handle real estate related trust accounts (non-interest bearing accounts unless state requires otherwise)

Management One recommends the following accounts to be set up: We recommend giving a color to avoid confusion within your management company

1. Corporate Checking Account (Red)

This account is for your general business account & is not set up as a trust account (Red)

2. Management One (Surname) General Trust Account (Blue)

This account is for all general ledger entries for all owner, resident & vendor transactions

3. Management One (Surname) Trust Account (Gold)

This account is for all resident security deposits

Check ordering (Blue, Red and Gold Accounts)

- Recommend Safeguard 951-352-0310 for Laser checks
- Laser 3 part Laser checks with check on top for Blue / Red checks
- Make sure each trust account (each owner's property) is insured by the bank, not just the Gold account but each property that is represented in the Gold Account

Sample Bank Form

THE BANK OF ORANGE COUNTY		001045393				
Account Holder Name(s): RONNIE W. SUDMAN DBA: MANAGEMENT ONE BEACH-SIDE TRUST ACCOUNT (BLUE ACCT)						
Reporting SSN/TIN: [REDACTED]						
Mailing Address: 620 NEWPORT CENTER DRIVE 11TH FLOOR						
State, Zip Code: NEWPORT BEACH, CA 92660						
Physical Location: 620 NEWPORT CENTER DRIVE 11TH FLOOR, NEWPORT BEACH, CA 92660						
Telephone Number:		Work #: (714) 721-6608				
Number of Signatures Required: 1		CIF Number:				
Signatures of Authorized Individuals. This Agreement is subject to all terms below.						
<table border="1"> <tr> <td>X</td> <td></td> </tr> <tr> <td>RONNIE W. SUDMAN, Owner</td> <td></td> </tr> </table>			X		RONNIE W. SUDMAN, Owner	
X						
RONNIE W. SUDMAN, Owner						

The authorized Agent(s) signing above agree(s), that the Account Holder's Account(s) will be governed by the terms set forth in the Account Agreement and Disclosure, the Rate and Fee Schedule, the Time Certificate of Deposit Agreement (if applicable), the Funds Availability Policy Disclosure and the Electronic Funds Transfer Agreement and Disclosure if requested above, as amended by the Financial Institution from time to time. The authorized Agent(s) also acknowledge that they have received at least one copy of these account documents.

Account Purpose: Non Consumer		EFT Services: No	
BUSINESS TYPE: Sole Proprietorship			
ACCOUNT TYPE BUSINESS CHECKING		OPENED BY JJ	
ACCOUNT NUMBER [REDACTED]		OFFICER 102	
Date Opened	Date Revised	Opening Deposit	ATM Card
02-13-98		\$	N
Verified By		Account Formerly With	
Chexsystems			
Date Closed	Closing Balance	Closed By	Reason For Closing
Statement Disposition		Service Chg Disposition	
Mail			

DEPOSIT PRO, Reg. U.S. Pat. & T.M. Off., Ver. 7.047 (9) 1998 OFI ProServices, Inc. All Rights Reserved. CA - L7088.24

Establish ACH

Establish an ACH account with Paylease. Contact Josh Hambarian 858-500-4905. This needs to be done as soon as your bank accounts are established.

Accounting Software

Accounting Software

Management One Property Management Systems recommends QuickBooks Online for your Corporate Business Accounting software. This program lets you access your corporate accounting anytime on any PC, laptop, or tablet. You may consider using Quicken (cash accounting option only) if you aren't familiar with internet banking, computerized checks, or other automated processes. Accounting on a cash basis is the easiest, but if you know how to do accrual accounting, then that option is available in QuickBooks.

Set up YOUR Chart of Accounts

Whether you use QuickBooks Online or Quicken, set up all income & expense codes for each category for your business account. See below for Chart of Account recommendations.

INCOME ACCOUNTS

INCOME

3 day posting fee

Later Fees

Administrative fees

Credit checks

Lease renewal fees (\$100)

Legal fees

Resident fees/Violations/sign ups/etc

Management Fees

Owner contract buyout fees

Key fee (Making keys)
Rent up fees
Real Sales commissions
Mortgagee referrals
Insurance referrals
5% Supervisory fee
5% Vendors contribution to marketing fund
Pay lease fees from residents
Pay lease fees from owners
Other

EXPENSES

Advertising for staff/paper/internet/etc.
Dept. of Real Estate fees
Business license
Company training
Computer cost
Credit check company for resident credit checks
DMV - Company vehicles
Equipment/office/ etc.
Insurance/office/Vehicles/Bus/E&O
Staff Labor/include taxes-bonuses/Med
Owners Labor/include taxes
Legal / Evictions/etc.
Marketing outside of NWMF

Network Marketing Fund (NWMF)

NSF Checks

Office Supplies

Payroll services

Petty Cash

Phone/Internet/fax/etc.

Postage

Protection One

Retirement for staff

Office Utilities

Office rent

Storage

Taxes business and corporate

Janitorial

Vehicle repair

CPA Accounting fees

Other

Other Software

Other Software

Remote PC access with www.gotomypc.com

Online Meeting Access with www.gotomeeting.com or www.webex.com

Microsoft's Professional Office Suite (which includes Publisher/Power Point)

Adobe Acrobat X Standard (Makes scanning, form creation and other tasks much easier)

Email marketing [Constant Contact](#)

Complete Monthly Budget Projection for the Office Operations

[See Excel Attachment](#)

Excel Spreadsheet - Monthly Budget for Property Management

Your Company Name (Only Type in BLUE areas)		Enter # of Doors	
		%	0
ACTUAL FOR Year of		Per Door	Per Year
INCOME			
3 DAY NOTICE		#DIV/0!	#DIV/0!
ACH FEES/OWNERS LOAN REMB.		#DIV/0!	#DIV/0!
ADMST FEE 1 STOP PYMT		#DIV/0!	#DIV/0!
ADVERTISING FEE - OWNERS \$\$\$		#DIV/0!	#DIV/0!
CREDIT CHECKS		#DIV/0!	#DIV/0!
LATE FEES		#DIV/0!	#DIV/0!
LEASE RENEWAL FEE \$100		#DIV/0!	#DIV/0!
LEGAL FEES		#DIV/0!	#DIV/0!
MANAGEMENT FEES		#DIV/0!	#DIV/0!
MGT ONE BUYOUT		#DIV/0!	#DIV/0!
MGT ONE KEYS (DAILY KEYS)		#DIV/0!	#DIV/0!
MISC. fees		#DIV/0!	#DIV/0!
RENT UP FEE		#DIV/0!	#DIV/0!
SUPERVISOR FEES		#DIV/0!	#DIV/0!
VENORR PENALTY - \$100		#DIV/0!	#DIV/0!
VIOLATION NOTICES - RESIDENTS		#DIV/0!	#DIV/0!
TOTAL INCOME	\$ -	#DIV/0!	#DIV/0!
EXPENSES			
ACH SERVICES-		#DIV/0!	#DIV/0!
ALARM SERVICES		#DIV/0!	#DIV/0!
BUS LICENSE		#DIV/0!	#DIV/0!
COMM REFUNDS		#DIV/0!	#DIV/0!
COMPANY TRAINING		#DIV/0!	#DIV/0!
COMPUTER - HARDWARE & IT SUPPORT		#DIV/0!	#DIV/0!
CPA - ACCOUNTING		#DIV/0!	#DIV/0!
CREDIT BUREAU FEES		#DIV/0!	#DIV/0!
CREDIT C. - Postage, Office Supplies, Gasoline		#DIV/0!	#DIV/0!
ELECT BILL/EDISON		#DIV/0!	#DIV/0!
EQUIP REPAIR & SERV CONT		#DIV/0!	#DIV/0!
INSURANCE BUS/VEHICLES/OFFICE		#DIV/0!	#DIV/0!
JANITRAL SERVICES		#DIV/0!	#DIV/0!
LABOR COST		#DIV/0!	#DIV/0!
LEASE APPLICATION FEES		#DIV/0!	#DIV/0!
LEGAL		#DIV/0!	#DIV/0!
LICENSES FEES		#DIV/0!	#DIV/0!
MARKETING / LEAD GENERATION / MOPC		#DIV/0!	#DIV/0!
MEDICAL DENTAL INSURANCE		#DIV/0!	#DIV/0!
MISC EXPENSE		#DIV/0!	#DIV/0!
MISTAKES		#DIV/0!	#DIV/0!
OFFICE MACHINES, COPIERS		#DIV/0!	#DIV/0!
OFFICE RENT		#DIV/0!	#DIV/0!
OFFICE SUPPLIES		#DIV/0!	#DIV/0!
OWNERS BUY OUTS		#DIV/0!	#DIV/0!
PAYROLL SERVICES		#DIV/0!	#DIV/0!
TRUST ACCOUNT BANK FEES		#DIV/0!	#DIV/0!
PHONE - P, ETC		#DIV/0!	#DIV/0!
POSTAGE		#DIV/0!	#DIV/0!
TECH SERV - T1, PH AND TABLET SERV		#DIV/0!	#DIV/0!
VEHICLES - LEASE, REPAIRS		#DIV/0!	#DIV/0!
FRANCHISE FEE - Royalties		#DIV/0!	#DIV/0!
ADS - MARKETING		#DIV/0!	#DIV/0!
WEB FEE - ANNUAL		#DIV/0!	#DIV/0!
DEDICATIONS		#DIV/0!	#DIV/0!
M/S SOFTWARE FEE		#DIV/0!	#DIV/0!
REFERRAL FEES		#DIV/0!	#DIV/0!
SIGNS		#DIV/0!	#DIV/0!
RESIDENTS D. RE-FLUND		#DIV/0!	#DIV/0!
LOANS TO OWNERS		#DIV/0!	#DIV/0!
TOTAL EXPENSES	\$ -	#DIV/0!	#DIV/0!
PRE TAX - PROFIT AFTER COST/PAC	\$ -	Per Year	#DIV/0!
	\$ -	Per Month	#DIV/0!
	\$0.00	Per Day	#DIV/0!

Set up utility services

Set up utility services

You, the owner, must order all utilities. Deposits or letters of credit are usually necessary before any service is turned on. Contact your local phone service provider and order telephone numbers for phone & fax as well as DSL/internet. The number of accounts you are managing will dictate how many lines are needed. At minimum you will need at least one phone line, fax line & DSL/internet connection.

Telephone

If you've never had commercial phone service in the city where your new office is located, you will be required to make a deposit. At the time you apply for service, you may be assigned a phone number. Verify that this number will not change at installation. Otherwise, if

you have checks or business cards printed before installation, you may need to reprint these items.

Water/Gas

You may need special equipment, or may be required to purchase your water meter. In some places, especially resort areas, an assessment (tax or fee) may also be required. Check beforehand!

Electric

Make application for electric service at least four to six weeks prior to opening. Once your building has had its final inspection, your permanent power can be connected. Allow three to seven days. Avoid having the Corporate Educator arrive with no power in your building. You will be paying your employees during training classes, so this time is valuable.

Internet

Set up a high-speed broadband connection either through your local cable or DSL provider.

Set up M1 Software (M1)

Set up M1 Software (M1)

M1 Software-- You will receive an interview sheet to fill out. This will allow us to customize the software to reflect your company information.

**Contact: Cara Percival
949-721-6695**

Schedule technical training

Schedule technical training

Contact the M1 Software Office about the software training event as soon as your projected opening date is decided. Schedule as early as you can in this process.

Establish office hours

Establish office hours

Check with other offices and retailers in your area or with your local municipality; establish your hours accordingly.

Order outdoor signs

Order outdoor signs

Be sure your landlord approves your sign **BEFORE** manufacturing begins to avoid additional delays and expense.

The following information is needed to guarantee the proper and timely installation of your sign:

1. The exact office address, unit #, city, and zip code
2. A phone number where you may be reached during sign installation
3. Your landlord's business address and phone number
4. A copy of the sign criteria from your lease
5. Overall width of your portion of the building
6. Type of building fascia: brick, siding, wood, etc.
7. Dimensions of any canopy or overhang

We suggest, when possible, you also send to the sign manufacturer a copy of the architect's elevation drawings of your office. It is very helpful to enclose a photograph of the front of the building. Please do not delay ordering your signage. "Opening Day" without identification in place can be embarrassing and expensive.

You may wish to obtain price quotes from local sign companies. You may have your sign manufactured anywhere you desire; however, it must meet the approved specifications.

Property Inspector Service Vehicle Logos

Sample Property Inspector Service Vehicle Logos

Contact Speedpro Imaging at 657-235-8119 for pricing on the logos www.speedpro.com

Ford Transit Van- Connect



YARD SIGN

SAMPLE OF YARD SIGN

See EXAMPLE below. Your sign should contain these elements in this order for best results.

Yard Sign Sample



Lowen Signs

Phone: 800-545-5505

Website: <http://www.lowensign.com/realestatesigns/>

See examples online at www.managementone.com

Recommended: Colonial style sign post

In-office signage

Sample of In-office signage, TV's and also have Music

In office Signage Sample



Order window, wall and in-office graphics

Your Corporate Office will supply information regarding these items.
Find a local company to manufacture and install these signs.

Fair Housing Logo Use, Poster & Advertising Rules

Policy for Fair housing and Equal Opportunity governed by the Code of Federal Regulation (CFR) and the Secretary of Housing and Urban Development known as HUD

In the investigation of complaints, the Assistant Secretary will consider the implementation of fair housing policies and practices provided in this section as evidence of compliance with the prohibitions against discrimination in advertising under the Fair Housing Act.

[HUD Fair Housing Regulations](#)

Use of Equal Housing Opportunity logotype, statement, or slogan.



§109.30(a) *Use of Equal Housing Opportunity logotype, statement, or slogan.*

All advertising of residential real estate for sale, rent, or financing should contain an equal housing opportunity logotype, statement, or slogan as a means of educating the homeseeking public that the property is available to all persons regardless of race, color, religion,

sex, handicap, familial status, or national origin. The choice of logotype, statement or slogan will depend on the type of media used (visual or auditory) and, in space advertising, on the size of the advertisement. Table I (see Appendix I) indicates suggested use of the logotype, statement, or slogan and size of logotype. Table II (see Appendix I) contains copies of the suggested Equal Housing Opportunity logotype, statement and slogan.


§109.30 Appendix I (Table II) Illustrations of Logotype, Statement, and Slogan. Equal Housing Opportunity Logotype:


Equal Housing Logotype: See Above

Equal Housing Opportunity Statement: We are pledged to the letter and spirit of U.S. policy for the achievement of equal housing opportunity throughout the Nation. We encourage and support an affirmative advertising and marketing program in which there are no barriers to obtaining housing because of race, color, religion, sex, handicap, familial status, or national origin.

Equal Housing Opportunity Slogan: ``Equal Housing Opportunity.''

Fair Housing Opportunity Poster (HUD FORM 928.1A)

U. S. Department of Housing and Urban Development 



**EQUAL HOUSING
OPPORTUNITY**

**We Do Business in Accordance With the Federal Fair
Housing Law**
(The Fair Housing Amendments Act of 1988)

**It is illegal to Discriminate Against Any Person
Because of Race, Color, Religion, Sex,
Handicap, Familial Status, or National Origin**

<input type="checkbox"/> In the sale or rental of housing or residential lots	<input type="checkbox"/> In the provision of real estate brokerage services
<input type="checkbox"/> In advertising the sale or rental of housing	<input type="checkbox"/> In the appraisal of housing
<input type="checkbox"/> In the financing of housing	<input type="checkbox"/> Blockbusting is also illegal

Anyone who feels he or she has been discriminated against may file a complaint of housing discrimination:
1-800-669-9777 (Toll Free)
1-800-927-9275 (TTY)
www.hud.gov/fairhousing

**U.S. Department of Housing and
Urban Development**
Assistant Secretary for Fair Housing and
Equal Opportunity
Washington, D.C. 20410

Previous editions are obsolete form HUD-928.1 (6/2011)

[HUD Fair Housing Opportunity Marketing Material](#)

§110.10(a) Except to the extent that paragraph (b) of this section applies, all persons subject to section 804 of the Act, Discrimination in the Sale or Rental of Housing and Other Prohibited Practices, shall post and maintain a fair housing poster as follows:

(1) With respect to a single-family dwelling (not being offered for sale or rental in conjunction with the sale or rental of other dwellings) offered for sale or rental through a real estate broker, agent, salesman, or person in the business of selling or renting dwellings, such person shall post and maintain a fair housing poster at any place of business where the dwelling is offered for sale or rental.

§110.15 All fair housing posters shall be prominently displayed so as to be readily apparent to all persons seeking housing accommodations

§110.25(a) The fair housing poster shall be 11 inches by 14 inches

Fair Housing Regulations guard against Discrimination

Here is a list of definitions for perceived types of discrimination by their usual level of Jurisdiction. You will need to inquire regarding which applies to your specific State or Local County Area, however it is good practice to make note that any of these areas are perceived as discriminatory practices and should not be taken lightly.

Federal Jurisdiction

Color: Pertaining to a person's skin color

Familial Status: Families in which one or more children under 18 live with: a parent; a person whom has legal custody of the child or children; or the designee of the parent or legal custodian, with the parent or custodian's written permission. Familial status protection also applies to pregnant women and anyone securing legal custody of a child under 18.

National Origin: refers to country of birth.

Physical or Mental Disability: In reference to you or someone close to you whom: has a physical or mental disability (including hearing, mobility and visual impairments, chronic alcoholism, chronic mental illness, AIDS, AIDS-related complex and mental retardation) that substantially limits one or more major life activities; has a record of such a disability; or is regarded as having such a disability.

Race: categories of physical characteristics and/or genetic groupings of human populations.

Religion: Participation with one of the world's structured religions; one's spiritual beliefs; inference of religion by place of worship.

Sex: Male or female.

State Jurisdiction

Marital Status: The state of being single, married, separated, divorced, or widowed.

Sexual Orientation: The identification of an individual as to male or female homosexuality, heterosexuality, or bisexuality.

Local County Jurisdiction

Age: Generally referring to adults 18 yrs & over.

Ancestry: line of decent.

Creed: A person's beliefs; also, a summary of principals or opinions to which someone professes or adheres.

Ethnic Origin: cultural upbringing, including ceremonies and traditions.

Family Responsibility: refers to decisions based on an assumption of a person's caregiving responsibilities, either childcare or care of another family member.

Gender Identity: An individual's having or being perceived as having a gender-related self-identity, self-image, appearance, expression, or behavior whether or not those gender-related characteristics differ from those associated with the individual's assigned sex at birth.

Genetic Information: Information about chromosomes, genes, gene products, or inherited characteristics that may derive from an individual or a family member; obtained for diagnostic and therapeutic purposes; and obtained at a time when the individual to whom the information relates is asymptomatic for the disease. (Genetic information" does not include: routine physical measurements; chemical, blood and urine analysis that are widely accepted and in use

in clinical practice; tests for use of drugs; or tests for the presence of the human immunodeficiency virus.)

Lawful Income: See below, 'Source of Income'.

Occupation: The principal lawful activity of one's life, generally including students, welfare recipients and retired persons.

Personal Appearance: The outward appearance of any person, irrespective of sex, with regard to hairstyle, facial hair, physical characteristics or manner of dress. Such term shall not relate to the requirement of cleanliness, uniforms or prescribed attire when uniformly applied for admittance to a public accommodation or to a class of employees for a customary or reasonable business.

Political Opinion: The opinion of persons relating to government, the conduct of government, political parties, candidates for election or elected office-holders.

Presence of Children: Households that include the temporary custody or permanent occupancy of persons under the age of 18 years.

Source of Income: Any lawful source of money that is paid to or for the benefit of a renter or buyer of housing and includes grants, government assistance, alimony, child support, pensions, annuities, legal gifts, or investment earnings.

PART 109--FAIR HOUSING ADVERTISING

EDITOR'S NOTE: 24 CFR Part 109 is no longer officially part of the Code of Federal Regulations. Part 109 was withdrawn from the Code of Federal Regulations by directive no. FR-4029-F-01, effective May 1, 1996. We have included the Part 109 regulations here because they still apparently represent the position of HUD on advertising issues, except as they were superseded by Roberta Achtenberg's memo of Jan. 9, 1995. (See Below)

Sec.

109.5 Policy.

109.10 Purpose.

109.15 Definitions.

109.16 Scope.

- 109.20 Use of words, phrases, symbols, and visual aids.
- 109.25 Selective use of advertising media or content.
- 109.30 Fair housing policy and practices.

APPENDIX I TO PART

109—FAIR HOUSING ADVERTISING

AUTHORITY: Title VIII, Civil Rights Act of 1968, 42 U.S.C. 3600-3620; section 7(d), Department of HUD Act, 42 U.S.C. 3535(d).

SOURCE: 54 FR 3308, Jan. 23, 1989, unless otherwise noted.

24 CFR §109.5 Policy

It is the policy of the United States to provide, within constitutional limitations, for fair housing throughout the United States. The provisions of the Fair Housing Act (42 U.S.C. 3600, et seq.) make it unlawful to discriminate in the sale, rental, and financing of housing, and in the provision of brokerage and appraisal services, because of race, color, religion, sex, handicap, familial status, or national origin. Section 804(c) of the Fair Housing Act, 42 U.S.C. 3604(c), as amended, makes it unlawful to make, print, or publish, or cause to be made, printed, or published, any notice, statement, or advertisement, with respect to the sale or rental of a dwelling, that indicates any preference, limitation, or discrimination because of race, color, religion, sex, handicap, familial status, or national origin, or an intention to make any such preference, limitation, or discrimination. However, the prohibitions of the act regarding familial status do not apply with respect to housing for older persons, as defined in section 807(b) of the act.

24 CFR §109.10 Purpose

The purpose of this part is to assist all advertising media, advertising agencies and all other persons who use advertising to make, print, or publish, or cause to be made, printed, or published, advertisements with respect to the sale, rental, or financing of dwellings which are in compliance with the requirements of the Fair Housing Act. These regulations also describe the matters this Department will review in evaluating compliance with the Fair Housing Act in connection with investigations of complaints alleging discriminatory housing practices involving advertising.

24 CFR §109.15 Definitions

(a) Assistant Secretary means the Assistant Secretary for Fair Housing and Equal Opportunity.

(b) General Counsel means the General Counsel of the Department of Housing and Urban Development.

(c) Dwelling means any building, structure, or portion thereof which is occupied as, or designed or intended for occupancy as, a residence by one or more families, and any vacant land which is offered for sale or lease for the construction or location thereon of any such building, structure, or portion thereof.

(d) Family includes a single individual.

(e) Person includes one or more individuals, corporations, partnerships, associations, labor organizations, legal representatives, mutual companies, joint-stock companies, trusts, unincorporated organizations, trustees, trustees in cases under title 11 U.S.C., receivers, and fiduciaries.

(f) To rent includes to lease, to sublease, to let and otherwise to grant for a consideration the right to occupy premises not owned by the occupant.

(g) Discriminatory housing practice means an act that is unlawful under section 804, 805, 806, or 818 of the Fair Housing Act.

(h) Handicap means, with respect to a person --

(1) A physical or mental impairment which substantially limits one or more of such person's major life activities,

(2) A record of having such an impairment, or

(3) Being regarded as having such an impairment.

This term does not include current, illegal use of or addiction to a controlled substance (as defined in section 102 of the Controlled Substances Act (21 U.S.C. 802)). For purposes of this part, an individual shall not be considered to have a handicap solely because that individual is a transvestite.

(i) Familial status means one or more individuals (who have not attained the age of 18 years) being domiciled with --

(1) A parent or another person having legal custody of such individual or individuals; or

(2) The designee of such parent or other person having such custody, with the written permission of such parent or other person. The protections afforded against discrimination on the basis of familial status shall apply to any person who is pregnant or is in the process of securing legal custody of any individual who has not attained the age of 18 years.

24 CFR §109.16 Scope

(a) General. This part describes the matters the Department will review in evaluating compliance with the Fair Housing Act in connection with investigations of complaints alleging discriminatory housing practices involving advertising. Use of these criteria will be considered by the General Counsel in making determinations as to whether there is reasonable cause, and by the Assistant Secretary in making determinations that there is no reasonable cause, to believe that a discriminatory housing practice has occurred or is about to occur.

(1) Advertising media. This part provides criteria for use by advertising media in determining whether to accept and publish advertising regarding sales or rental transactions. Use of these criteria will be considered by the General Counsel in making determinations as to whether there is reasonable cause, and by the Assistant Secretary in making determinations that there is no reasonable cause, to believe that a discriminatory housing practice has occurred or is about to occur.

(2) Persons placing advertisements. A failure by persons placing advertisements to use the criteria contained in this part, when found in connection with the investigation of a complaint alleging the making or use of discriminatory advertisements, will be considered by the General Counsel in making a determination of reasonable cause, and by the Assistant Secretary in making determinations that there is no reasonable cause, to believe that a discriminatory housing practice has occurred or is about to occur.

(b) Affirmative advertising efforts. Nothing in this part shall be construed to restrict advertising efforts designed to attract persons to dwellings who would not ordinarily be expected to apply, when such efforts are pursuant to an affirmative marketing program or

undertaken to remedy the effects of prior discrimination in connection with the advertising or marketing of dwellings.

(54 FR 3308, Jan. 23, 1989, as amended at 55 FR 53294, Dec. 28, 1990)

24 CFR §109.20 Use of words, phrases, symbols, and visual aids

The following words, phrases, symbols, and forms typify those most often used in residential real estate advertising to convey either overt or tacit discriminatory preferences or limitations. In considering a complaint under the Fair Housing Act, the Department will normally consider the use of these and comparable words, phrases, symbols, and forms to indicate a possible violation of the act and to establish a need for further proceedings on the complaint, if it is apparent from the context of the usage that discrimination within the meaning of the act is likely to result.

(a) Words descriptive of dwelling, landlord, and tenants. White private home, Colored home, Jewish home, Hispanic residence, adult building.

(b) Words indicative of race, color, religion, sex, handicap, familial status, or national origin --

(1) Race -- Negro, Black, Caucasian, Oriental, American Indian.

(2) Color -- White, Black, Colored.

(3) Religion -- Protestant, Christian, Catholic, Jew.

(4) National origin -- Mexican American, Puerto Rican, Philippine, Polish, Hungarian, Irish, Italian, Chicano, African, Hispanic, Chinese, Indian, Latino.

(5) Sex -- the exclusive use of words in advertisements, including those involving the rental of separate units in a single or multi-family dwelling, stating or tending to imply that the housing being advertised is available to persons of only one sex and not the other, except where the sharing of living areas is involved. Nothing in this part restricts advertisements of dwellings used exclusively for dormitory facilities by educational institutions.

(6) Handicap -- crippled, blind, deaf, mentally ill, retarded, impaired, handicapped, physically fit. Nothing in this part restricts the

inclusion of information about the availability of accessible housing in advertising of dwellings.

(7) Familial status -- adults, children, singles, mature persons. Nothing in this part restricts advertisements of dwellings which are intended and operated for occupancy by older persons and which constitute housing for older persons as defined in part 100 of this title.

(8) Catch words -- Words and phrases used in a discriminatory context should be avoided, e.g., restricted, exclusive, private, integrated, traditional, board approval or membership approval.

(c) Symbols or logotypes. Symbols or logotypes which imply or suggest race, color, religion, sex, handicap, familial status, or national origin.

(d) Colloquialisms. Words or phrases used regionally or locally which imply or suggest race, color, religion, sex, handicap, familial status, or national origin.

(e) Directions to real estate for sale or rent (use of maps or written instructions). Directions can imply a discriminatory preference, limitation, or exclusion. For example, references to real estate location made in terms of racial or national origin significant landmarks, such as an existing black development (signal to blacks) or an existing development known for its exclusion of minorities (signal to whites). Specific directions which make reference to a racial or national origin significant area may indicate a preference. References to a synagogue, congregation or parish may also indicate a religious preference.

(f) Area (location) description. Names of facilities which cater to a particular racial, national origin or religious group, such as country club or private school designations, or names of facilities which are used exclusively by one sex may indicate a preference.

24 CFR §109.25 Selective use of advertising media or content

The selective use of advertising media or content when particular combinations thereof are used exclusively with respect to various housing developments or sites can lead to discriminatory results and may indicate a violation of the Fair Housing Act. For example, the use of English language media alone or the exclusive use of media catering to the majority population in an area, when, in such area, there are also available non-English language or other minority media, may have discriminatory impact. Similarly, the selective use of human models in advertisements may have discriminatory impact. The following are

examples of the selective use of advertisements which may be discriminatory:

(a) Selective geographic advertisements. Such selective use may involve the strategic placement of billboards; brochure advertisements distributed within a limited geographic area by hand or in the mail; advertising in particular geographic coverage editions of major metropolitan newspapers or in newspapers of limited circulation which are mainly advertising vehicles for reaching a particular segment of the community; or displays or announcements available only in selected sales offices.

(b) Selective use of equal opportunity slogan or logo. When placing advertisements, such selective use may involve placing the equal housing opportunity slogan or logo in advertising reaching some geographic areas, but not others, or with respect to some properties but not others.

(c) Selective use of human models when conducting an advertising campaign. Selective advertising may involve an advertising campaign using human models primarily in media that cater to one racial or national origin segment of the population without a complementary advertising campaign that is directed at other groups. Another example may involve use of racially mixed models by a developer to advertise one development and not others. Similar care must be exercised in advertising in publications or other media directed at one particular sex, or at persons without children. Such selective advertising may involve the use of human models of members of only one sex, or of adults only, in displays, photographs or drawings to indicate preferences for one sex or the other, or for adults to the exclusion of children.

24 CFR §109.30a Fair housing policy and practices

In the investigation of complaints, the Assistant Secretary will consider the implementation of fair housing policies and practices provided in this section as evidence of compliance with the prohibitions against discrimination in advertising under the Fair Housing Act.

(a) Use of Equal Housing Opportunity logotype, statement, or slogan. All advertising of residential real estate for sale, rent, or financing should contain an equal housing opportunity logotype, statement, or slogan as a means of educating the homeseeking public that the property is available to all persons regardless of race, color, religion, sex, handicap, familial status, or national origin. The choice of

logotype, statement or slogan will depend on the type of media used (visual or auditory) and, in space advertising, on the size of the advertisement. Table I (see appendix I) indicates suggested use of the logotype, statement, or slogan and size of logotype. Table II (see appendix I) contains copies of the suggested Equal Housing Opportunity logotype, statement and slogan.

(b) Use of human models. Human models in photographs, drawings, or other graphic techniques may not be used to indicate exclusiveness because of race, color, religion, sex, handicap, familial status, or national origin. If models are used in display advertising campaigns, the models should be clearly definable as reasonably representing majority and minority groups in the metropolitan area, both sexes, and, when appropriate, families with children. Models, if used, should portray persons in an equal social setting and indicate to the general public that the housing is open to all without regard to race, color, religion, sex, handicap, familial status, or national origin, and is not for the exclusive use of one such group.

(c) Coverage of local laws. Where the Equal Housing Opportunity statement is used, the advertisement may also include a statement regarding the coverage of any local fair housing or human rights ordinance prohibiting discrimination in the sale, rental or financing of dwellings.

(d) Notification of fair housing policy --

(1) Employees. All publishers of advertisements, advertising agencies, and firms engaged in the sale, rental or financing of real estate should provide a printed copy of their nondiscrimination policy to each employee and officer.

(2) Clients. All publishers or advertisements and advertising agencies should post a copy of their nondiscrimination policy in a conspicuous location wherever persons place advertising and should have copies available for all firms and persons using their advertising services.

(3) Publishers' notice. All publishers should publish at the beginning of the real estate advertising section a notice such as that appearing in Table III (see appendix I). The notice may include a statement regarding the coverage of any local fair housing or human rights ordinance prohibiting discrimination in the sale, rental or financing of dwellings.

24 CFR §109.30 Appendix I (Table I) to Part 109 -- Fair Housing Advertising

The following three tables may serve as a guide for the use of the Equal Housing Opportunity logotype, statement, slogan, and publisher's notice for advertising:

Table I

A simple formula can guide the real estate advertiser in using the Equal Housing Opportunity logotype, statement, or slogan. In all space advertising (advertising in regularly printed media such as newspapers or magazines) the following standards should be used:

Size of advertisement	Size of logotype in inches
1/2 page or larger	2x2
1/8 page up to 1/2 page	1x1
4 column inches to 1/8 page	1/2 x 1/2
Less than 4 column inches	Do not use

In any other advertisements, if other logotypes are used in the advertisement, then the Equal Housing Opportunity logo should be of a size at least equal to the largest of the other logotypes; if no other logotypes are used, then the type should be bold display face which is clearly visible. Alternatively, when no other logotypes are used, 3 to 5 percent of an advertisement may be devoted to a statement of the equal housing opportunity policy.

In space advertising which is less than 4 column inches (one column 4 inches long or two columns 2 inches long) of a page in size, the Equal Housing Opportunity slogan should be used. Such advertisements may be grouped with other advertisements under a caption which states that the housing is available to all without regard to race, color, religion, sex, handicap, familial status, or national origin.

24 CFR §109.30 Appendix I (Table II) to Part 109 -- Fair Housing Advertising



Table II

Illustrations of Logotype, Statement, and Slogan. Equal Housing Opportunity Logotype:

Equal Housing Opportunity Statement: We are pledged to the letter and spirit of U.S. policy for the achievement of equal housing opportunity throughout the Nation. We encourage and support an affirmative advertising and marketing program in which there are no barriers to obtaining housing because of race, color, religion, sex, handicap, familial status, or national origin.

Equal Housing Opportunity Slogan: ``Equal Housing Opportunity."`

24 CFR §109.30 Appendix I (Table III) to Part 109 -- Fair Housing Advertising

Table III

Illustration of Media Notice -- Publisher's notice: All real estate advertised herein is subject to the Federal Fair Housing Act, which makes it illegal to advertise ``any preference, limitation, or discrimination because of race, color, religion, sex, handicap, familial status, or national origin, or intention to make any such preference, limitation, or discrimination."`

We will not knowingly accept any advertising for real estate which is in violation of the law. All persons are hereby informed that all dwellings advertised are available on an equal opportunity basis.

Roberta Achtenberg's memo; Advertisements Under 804(c) of the Fair Housing Act - Jan. 9, 1995

Housing and Urban Development

Washington, D.C. 20410-2000

January 9, 1995

MEMORANDUM FOR: FHEO Office Directors, Enforcement Directors, Staff, Office of Investigations, Field Assistant General Counsel

FROM: Roberta Achtenberg, Assistant Secretary for Fair Housing and Equal Opportunity, E

SUBJECT: Guidance Regarding Advertisements Under 804(c) of the Fair Housing Act

The purpose of this memorandum is to provide guidance on the procedures for the acceptance and investigation of allegations of discrimination under Section 804(c) of the Fair Housing Act (the Act) involving the publication of real estate advertisements. (This memorandum does not address fair housing issues associated with the publication of advertisements containing human models, and does not address 804(c) liability for making discriminatory statement.)

Recently, the number of inquiries involving whether or not potential violations of the Act occur through use of certain words or phrases has increased, and these issues cannot, in some situations, be answered by referring to decided cases alone. In some circumstances, the Advertising Guidelines, published at 24C.F.R. Part 109, have been interpreted (usually by persons outside of HUD) to extend the liability for advertisements to circumstances which are unreasonable.

This guidance is meant to advise you of the Department's position on several of these issues.

Previous guidance already requires that Intake staff review a potential complaint, gather preliminary information to ascertain whether the complaint states a claim under the Act, and consult with counsel on any legally questionable matters before the complaint is filed.

Likewise, jurisdictional issues such as standing and timeliness should also be established prior to filing.

If the Advertising Guidelines, this memorandum, or a judicial decision clearly indicate that the language used in the advertisement is a potential violation of Section 804(c) and the criteria for establishing jurisdiction are met, the complaint should be filed and processed. Any complaint concerning an advertisement which requires an assessment of whether the usage of particular words or phrases in context is discriminatory, requires the approval of Headquarters FHEO before a complaint is filed. If the advertisement appears to be discriminatory, but the Advertising Guidelines, this memorandum, or a Judicial decision do not explicitly address the language in question, supervisory staff must also obtain approval of Headquarters FHEO before the complaint is filed. Potential complaints regarding advertisements which do not meet the above descriptions should not be filed.

Where there is a question about whether a particular real estate advertising complaint should be filed, relevant information regarding the factual and/or legal issues involved in the complaint should be gathered, and counsel should be consulted prior to contacting the potential respondent publisher. The matter should then be referred to the Office of Investigations for review. Such referrals may take the form of a short memo, reciting the applicable advertisement language, and any factual or legal analysis which is appropriate.

Section 804(c) of the Act prohibits the making, printing and publishing of advertisements which state a preference, limitation or discrimination on the basis of race, color, religion, sex, handicap, familial status, or national origin. The prohibition applies to publishers, such as newspapers and directories, as well as to persons and entities who place real estate advertisements. It also applies to advertisements where the underlying property may be exempt from the provisions of the Act, but where the advertisement itself violates the Act. See 42 U.S.C. 3603 (b).

Publishers and advertisers are responsible under the Act for making, printing, or publishing an advertisement that violates the Act on its face. Thus, they should not publish or cause to be published an advertisement that on its face expresses a preference, limitation or discrimination on the basis of race, color, religion, sex, handicap, familial status, or national origin. To the extent that either the Advertising Guidelines or the case law do not state that particular terms or phrases (or closely comparable terms) may violate the Act, a publisher is not liable under the Act for advertisements which, in the

context of the usage in a particular advertisement, might indicate a preference, limitation or discrimination, but where such a preference is not readily apparent to an ordinary reader. Therefore, complaints will not be accepted against publishers concerning advertisements where the language might or might not be viewed as being used in a discriminatory context.

For example, Intake staff should not accept a complaint against a newspaper for running an advertisement which includes the phrase female roommate wanted because the advertisement does not indicate whether the requirements for the shared living exception have been met. Publishers can rely on the representations of the individual placing the ad that shared living arrangements apply to the property in question. Persons placing such advertisements, however, are responsible for satisfying the conditions for the exemption. Thus, an ad for a female roommate could result in liability for the person placing the ad if the housing being advertised is actually a separate dwelling unit without shared living spaces. See 24 CFR 109.20.

Similarly, Intake staff should not file a familial status complaint against a publisher of an advertisement if the advertisement indicates on its face that it is housing for older persons. While an owner-respondent may be held responsible for running an advertisement indicating an exclusion of families with children if his or her property does not meet the "housing for older persons" exemption, a publisher is entitled to rely on the owner's assurance that the property is exempt.

The following is policy guidance on certain advertising issues which have arisen recently. We are currently reviewing past guidance from this office and from the Office of General Counsel and will update our guidance as appropriate.

1. Race, color, National origin. Real estate advertisements should state no discriminatory preference or limitation on account of race, color, or national origin. Use of words describing the housing, the current or potential residents, or the neighbors or neighborhood in racial or ethnic terms (i.e, white family home, no Irish) will create liability under this section.

However, advertisements which are facially neutral will not create liability. Thus, complaints over use of phrases such as master bedroom, rare find, or desirable neighborhood should not be filed.

2. Religion. Advertisements should not contain an explicit preference, limitation or discrimination on account of religion (i.e. no Jews,

Christian home). Advertisements which use the legal name of an entity which contains a religious reference (for example, Roselawn Catholic Home), or those which contain a religious symbol, (such as a cross), standing alone, may indicate religious preference. However, if such an advertisement includes a disclaimer (such as the statement "This Home does not discriminate on the basis of race, color, religion, national origin, sex, handicap or familial status") it will not violate the Act. Advertisements containing descriptions of properties (apartment complex with chapel), or services (kosher meals available) do not on their face state a preference for persons likely to make use of those facilities, and are not violations of the Act.

The use of secularized terms or symbols relating to religious holidays such as Santa Claus, Easter Bunny, or St.Valentine's Day images, or phrases such as Merry Christmas, Happy Easter, or the like does not constitute a violation of the Act.

3. Sex. Advertisements for single family dwellings or separate units in a multi-family dwelling should contain no explicit preference, limitation or discrimination based on sex. Use of the term master bedroom does not constitute a violation of either the sex discrimination provisions or the race discrimination provisions. Terms such as "mother-in-law suite" and "bachelor apartment" are commonly used as physical descriptions of housing units and do not violate the Act.

4. Handicap. Real estate advertisements should not contain explicit exclusions, limitations, or other indications of discrimination based on handicap (i.e., no wheelchairs). Advertisements containing descriptions of properties (great view, fourth-floor walk-up, walk-in closets), services or facilities (jogging trails), or neighborhoods (walk to bus-stop) do not violate the Act. Advertisements describing the conduct required of residents ("non-smoking", "sober") do not violate the Act. Advertisements containing descriptions of accessibility features are lawful (wheelchair ramp).

5. Familial status. Advertisements may not state an explicit preference, limitation or discrimination based on familial status. Advertisements may not contain limitations on the number or ages of children, or state a preference for adults, couples or singles. Advertisements describing the properties (two bedroom, cozy, family room), services and facilities (no bicycles allowed) or neighborhoods (quiet streets) are not facially discriminatory and do not violate the Act.

Please contact Sara R. Pratt, Director, Office of Investigations or Susan Forward, Deputy Assistant Secretary for Enforcement and Investigations, for further information.

Supply Ordering

Establish Supply Accounts

Signs set up at time of ordering

Office Depot/Staples fulfillment products/stationary set up at time of ordering

Office Depot / Staples set up at time of ordering

Report business credit card information to Supplier Distributors

This information will be held on file to use "as needed". When you place your supply orders, this information will already be available to expedite processing of your order.

Place opening Supply order

Office Supplies	Quantity	Price Ea	Total	Company
(2 work-station system)				
1" White view binder	20	\$ 2.89	\$ 57.80	Staples/Office Depot
1 1/2" White view binder	10	\$ 3.44	\$ 34.40	Staples/Office Depot
Stapler/Staples	1	\$ 6.99	\$ 6.99	Staples/Office Depot
Stapler - Electric	2	\$ 20.00	\$ 40.00	Staples/Office Depot
Tape Dispenser/Tape 3/4"	1	\$ 5.49	\$ 5.49	Staples/Office Depot
Staple remover	1	\$ 2.29	\$ 2.29	Staples/Office Depot
Pens/Pencils (few boxes)	2	\$ 5.00	\$ 5.00	Staples/Office Depot
Pen Holder	2	\$ 1.70	\$ 3.40	Staples/Office Depot

Most of your office inventory may be purchased from local suppliers. **Your opening orders need to be placed at least 4-6 weeks prior to your office opening in order to insure its timely arrival at your office and its accuracy and completeness.**

[See Excel Sheet](#)

Stationary and Promotional Items

Order your printing needs from Staples or Office Depot - stationery, business cards, envelopes and many other materials. The Management One Licensed Operating System (MOLOS) or our national vendors will provide you with a sample packet of various printed materials and forms.

Most of your office inventory may be purchased suppliers. **Your opening orders need to be placed at least 4-6 weeks prior to your office opening in order to insure its timely arrival at your office and its accuracy and completeness.**

Sample Promotional Items

Thank you for visiting the Management One Product store. Our website is currently being upgraded for your convenience. Apparel orders are best sent via email to debie@advedge.com for personal service. Please continue to order all other products directly through the website. If you have any questions regarding our products or can not find what you are looking for please contact Debie (debie@advedge.com) 1-800-258-9774 ext 113.

Promotional Products:



House Magnetic Clip
\$1.45 - \$1.65



Letter Slitters
\$0.86 - \$1.36



Post-it Cube
\$6.50



Magnetic Memo Board
\$1.03 - \$1.49



11" Balloons
\$0.38



Rectangle Keytag
\$0.78 - \$0.97



Admiral Mug
\$5.99 - \$9.99



Ladle Mug
\$2.24 - \$2.54



Omega Plastic Mug
\$2.33 - \$2.90

You can order these promotional items from Staples, Office Depot or a local vendor.

Sample Stationary Printing

Thank you for visiting the Management One Product store. Our website is currently being upgraded for your convenience. Apparel orders are best sent via email to debie@advedge.com for personal service. Please continue to order all other products directly through the website. If you have any questions regarding our products or can not find what you are looking for please contact Debie (debie@advedge.com) 1-800-258-9774 ext 113.

Stationary:



Letterhead



Business Cards



Door Hangers



Envelopes



Large Envelope

Questions? [Click here to send us an email.](#)



Telescope Banners

www.nationalbannerstands.com 877-248-7764 (the artwork will be provided to you by Corporate)

Telescoping Banner Sample



Office equipment and supplies

Two Work Station System for standalone office or Executive Office
[See Excel Attachment](#)

Two Work Station System

Office Furnishings & Misc	Quantity	Price Ea	Total	Company	Phone #
2 Work Station System					
Tablets - PC - Android must have flash	2	\$ 500.00	\$ 1,000.00	Best Buy	
Computer (see breakdown)	2	\$ 1,250.00	\$ 2,500.00	Best Buy	
Printer with color	1	\$ 200.00	\$ 200.00	Best Buy	
Calculator	2	\$ 49.00	\$ 98.00	Staples/Office Depot	
P-Touch	1	\$ 89.00	\$ 89.00	Staples/Office Depot	
Copy machine	1	\$ 300.00	\$ 300.00	Staples/Office Depot	
Property file cabinet	1	\$ 360.00	\$ 360.00	Consolidated Office	714/692-1311
Key cabinet	1	\$ 110.00	\$ 110.00	Staples/Office Depot	
Signs/Yard	25	\$ 80.00	\$ 2,000.00	Oakley Signs	(complete \$80.
Signs/Post & crossbar	25	\$ 60.00	\$ 1,500.00	Oakley Signs	
Signs/For rent banner	40	\$ 15.00	\$ 600.00	Oakley Signs	
Signs/Arrows	40	\$ 15.00	\$ 600.00	Oakley Signs	
Signs/Ask us	40	\$ 15.00	\$ 600.00	Oakley Signs	
White erase board	1	\$ 60.00	\$ 60.00	Staples/Office Depot	
Storage cabinet 4x6	1	\$ 199.00	\$ 199.00	Staples/Office Depot	
2 drawer cabinet	1	\$ 79.00	\$ 79.00	Staples/Office Depot	
Paper cutter	1	\$ 50.00	\$ 50.00	Staples/Office Depot	

Additional Items Needed for Standalone Office

- Plants, pictures, etc.
- Reception Counter
- Lobby Chairs
- Headset for phone

Items Needed For Van/ Property Inspector

Office Supplies:					
Sharpie (Black & Red)		1	0	\$ 5.29	
Ream of paper		1	0	\$ 6.49	
Wrist Band for labeling walls to paint		1	0	\$ 18.95	
Orange stickers		4	0	\$ 7.29	
Green stickers		4	0	\$ 7.39	
Wrist tape dispenser		1	0	\$ 3.43	
Scotch tape for wrist tape dispenser		2	0	\$ 10.49	
Paper towels		2	0	\$ 0.99	
Trash can		1	0	4.99	
Receipt Book		1	0	3.69	
Printer Cartridges		2	0		
Electronics:					
Tablet		1	0		
Laptop		1	0		
Printer		1	0		

[See Excel Attachment](#)

Items for Marketing & Presentations

Marketing Items -Start-up	Quantity	Price Ea	Total	Company	Phone #	Monthly
Marketing Album/Folder	500	\$ 3.00	\$ 1,500.00			
* Join Board of Realtors	1	\$ 600.00	\$ 600.00			
Introductory 3 1/2 x 8 1/2	1000	\$ 1.00	\$ 1,000.00			
Advert in local bd of realtor newsletter	0	\$ -	\$ -			
Seminars with - Power point (To public, agents, current owners)	6	\$ 2,085.00	\$ 12,500.00			
Google - Monthly	12	\$ 250.00	\$ 3,000.00			
Website set up fee	1	\$ 1,700.00	\$ 1,700.00			
Website hosting fee \$20/month	12	\$ 20.00	\$ 240.00			
Contact management software-KIT	1	\$ 56.00	\$ 56.00			
Current owner campaign - \$2.85/own	300	\$ 2.85	\$ 855.00			
Agent,Brokers,Mortg Brokers \$2.23/ea	2500	\$ 2.23	\$ 5,575.00			
Preferred Agent,Broker,Mortg Brokers	200	\$ 25.12	\$ 5,024.00			
Other Management companies	30	\$ 37.33	\$ 1,119.90			
New HousingTracts	50	\$ 26.70	\$ 1,335.00			
Buying Real Estate Agent Ppty	2500	\$ 1.00	\$ 2,500.00			
Past Happy Owners	100	\$ 3.00	\$ 300.00			
Current Resident Campaign	300	\$ 1.50	\$ 450.00			
Pres at R.E. Offices - Food	10	\$ 100.00	\$ 1,000.00			
Estimated postage- start up	1000	\$ 0.47	\$ 470.00			
Agent Spiral booklets	300	\$ 2.50	\$ 750.00			
Coffee Cups	1000	\$ 2.85	\$ 2,850.00			
Letter Openers	1000	\$ 0.68	\$ 680.00			
Key Chains	1000	\$ 1.00	\$ 1,000.00			
Shirts	12	\$ 30.00	\$ 360.00			
Slacks	12	\$ 30.00	\$ 360.00			
Coats (Windbreaker)	2	\$ 50.00	\$ 100.00			
Hats	1	\$ 15.00	\$ 15.00			
Total			\$ 45,339.90			\$ -
*** Referral fees are paid to agents and owners and tenants once referrals are confirmed, that would be up and above the investment you see here:						
Recommended referral rates:						
Agents, Brokers, Mort Brks,		\$ 150 - \$300				
Owner and Residents		\$ 100.00				
These are recommend rates only as each Broker should set their own rates, see your attorney for details						

[See Excel Attachment](#)

Recommended Office Supply List

While much of the real estate industry has adopted a paperless system for tracking and storing documents, many departments of Real Estate still require hard copies of contracts. Please ensure you comply with your local regulations on storing and keeping records and purchase an appropriate file system and file folders to organize them. We recommend one file for each property and files for vendors as well to track their insurance coverage.

Excel - Office Supply List

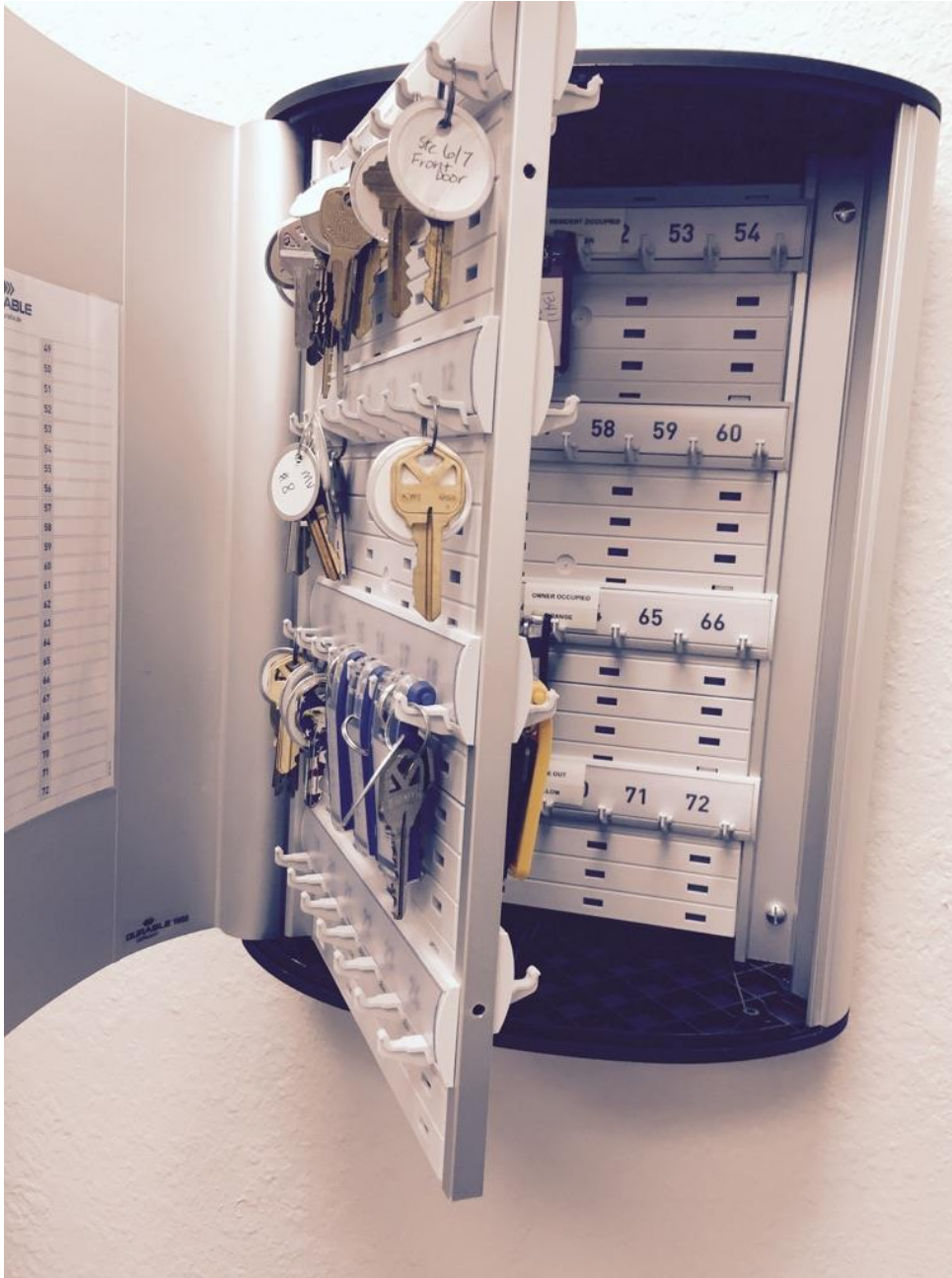
Office Supplies (2 work-station system)	Quantity	Price Ea	Total	Company
1" White view binder	20	\$ 2.89	\$ 57.80	Staples/Office Depot
1 1/2" White view binder	10	\$ 3.44	\$ 34.40	Staples/Office Depot
Stapler/Staples	1	\$ 6.99	\$ 6.99	Staples/Office Depot
Stapler - Electric	2	\$ 20.00	\$ 40.00	Staples/Office Depot
Tape Dispenser/Tape 3/4"	1	\$ 5.49	\$ 5.49	Staples/Office Depot
Staple remover	1	\$ 2.29	\$ 2.29	Staples/Office Depot
Pens/Pencils (few boxes)	2	\$ 5.00	\$ 5.00	Staples/Office Depot
Pen Holder	2	\$ 1.70	\$ 3.40	Staples/Office Depot
Business card holder	2	\$ 1.25	\$ 2.50	Staples/Office Depot
Paper clips (small/box)	5	\$ 0.40	\$ 2.00	Staples/Office Depot
Paper clips (jumbo/box)	5	\$ 1.35	\$ 6.75	Staples/Office Depot
Paper clips holder	2	\$ 2.35	\$ 4.70	Staples/Office Depot
A-Z Tabs for rents 5x8	1	\$ 4.49	\$ 4.49	Staples/Office Depot
A-Z Tabs holder 5x8	1	\$ 2.99	\$ 2.99	Staples/Office Depot
Post-it Notes	4	\$ 6.50	\$ 26.00	Staples/Office Depot
Application holder	1	\$ 25.99	\$ 25.99	Staples/Office Depot
Date stamper	1	\$ 4.55	\$ 4.55	Staples/Office Depot
Stamp ink pad	1	\$ 1.95	\$ 1.95	Staples/Office Depot
In Box/Work Box	4	\$ 5.99	\$ 23.96	Staples/Office Depot
Desk organizer for pens,etc	1	\$ 2.79	\$ 2.79	Staples/Office Depot
Vertical metal organizers 8 slots	4	\$ 19.99	\$ 79.96	Staples/Office Depot
Surface savers "grommets"	2	\$ 3.99	\$ 7.98	Staples/Office Depot

[See Excel Attachment](#)

Key Box



Keybox Interior

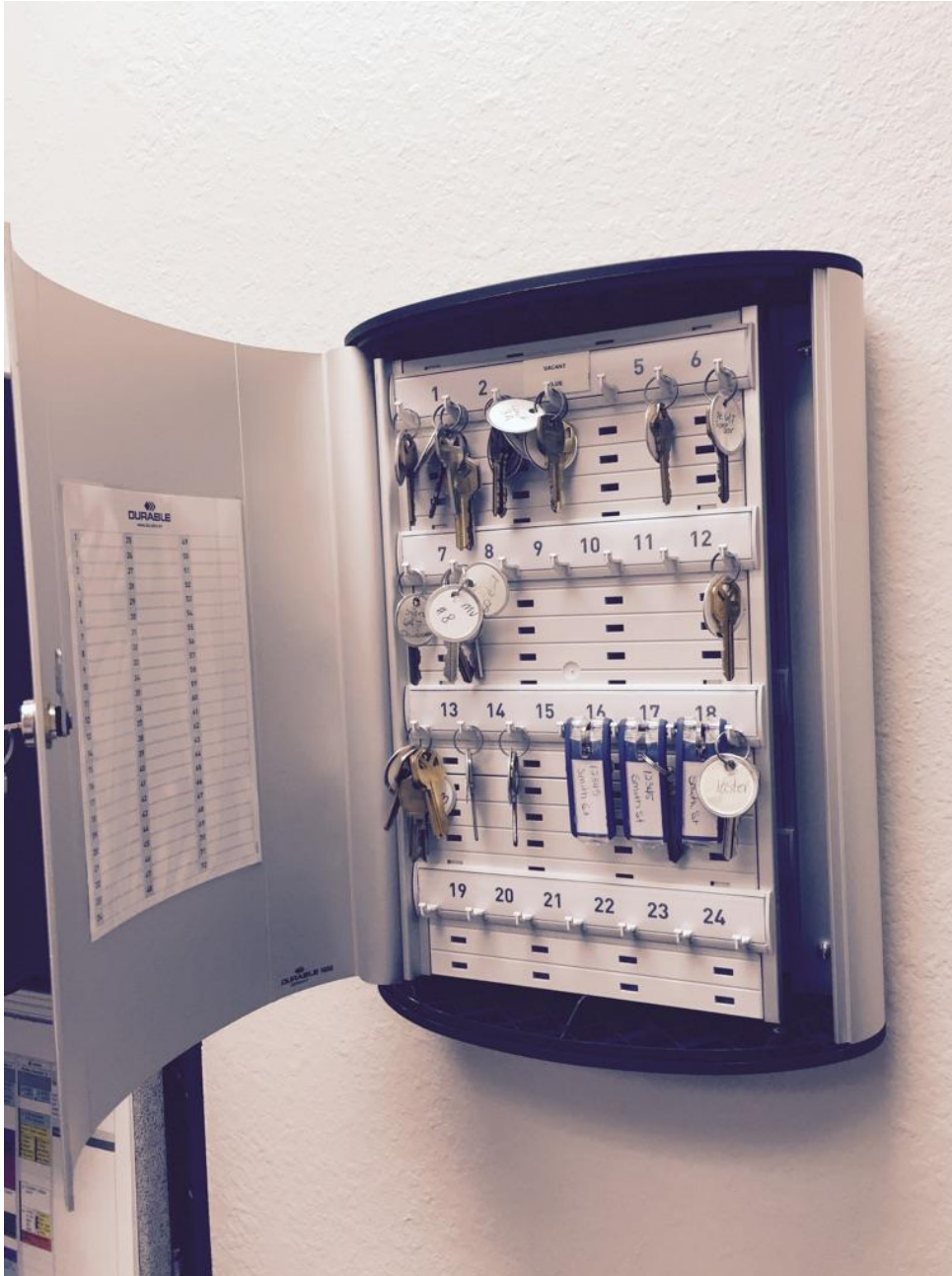


This key box will be used to store property keys in. These keys are organized in reference to the status of the property.

KeyBox Index



Add'l



Grand Opening plan

Preparing for your Grand Opening

A grand opening advertising plan is necessary to establish both name recognition and a flow of customers coming to your office. Through careful planning and spending, these goals will be accomplished.

Items to be completed for Grand Opening

- Send an electronic email invitation to all Real Estate agents, Escrow Agents, Current Clients announcing your open house/Grand Opening with an RSVP
- Establish a Social Media presence including Facebook and Instagram. Connect with cities surrounding your business. Posting your grand opening on these sites is a great way to get your name out there.
- Start a Facebook campaign
- Post an Ad online with your local newspaper
- Order food and drinks, etc.
- Setup balloons, signage, etc.
- Setup giveaway items for branding (notepads, post its, pens, fabric grocery bags, etc.
- Install a "Coming Soon" or "Grand Opening" banner on the office building during build out

Schedule final inspection of construction

Your contractor normally schedules the final inspection. If your contractor will not handle this for you, contact the building authorities to schedule an inspection.

Clean your office

Make sure your office sparkles. The average customer judges the professionalism of the office by its cleanliness. There is no such thing as an office being too clean.

Employee Set Up

Office Uniform

Keeping a professional look in the office is of the utmost importance, and keeping a uniform look breeds consistency and a team focus. Of course you can choose your own office colors for your staff to wear. We had picked White/Beige shirts and blouses with Black pants. All shirts and blouses elected to be approved for the uniform were embroidered with the company logo.

Staff Uniform



Embroidered Logo



Complete Set Up of Employees

Keys to successful compensation

1. Compensation has to allow for company profitability or there will be no company.
2. Employee must be paid what they are worth to the company.
3. Employees have different compensation needs based on age and individual social/economic barriers.

Components of Compensation

1. Payroll
2. Wages
3. Salary
4. Commission
5. Salary + bonus
6. Incentives
7. Sales incentive program
8. Self-development courses
9. Career ladder opportunities
10. Recognition and awards programs
11. Placement potential throughout the system (U.S. and International)

Benefits

There are two categories of benefits, Compulsory Benefits and Voluntary Benefits. Examples for both are listed below.

Compulsory Benefits

1. FICA (Federal Insurance Contributions Act)
2. FUTA (Federal Unemployment Tax Act)
3. Workman's Compensation
4. Health Insurance (some states)
5. Jury Duty
6. Maternity Leave

Voluntary Benefits

1. Health Insurance

2. Sick Pay
3. Vacation
4. Holidays
5. Paid Personal Leave of Absence
6. Disability Insurance
7. Paternity Leave
8. Profit Sharing Plan
9. Additional compensation based on factors such as productivity, length of service, and overall contribution to the benefit of the business operation.

Establish office policies

We strongly encourage you to adopt written policies and procedures for all of your employees. This will help you be fair, consistent and avoid many future misunderstandings or conflicts. Employees know upfront what is expected of them and what they can expect from you. The rules that you publish need not be an all-inclusive list, but should cover the majority of situations that you could encounter on a day-to-day basis.

Advertise for staff members

Recruiting is a major part of your business and should begin approximately 4-6 weeks before your office opening. Recruitment of professionals is a **continuous** process. Even if you have a full staff, you never know when someone is going to leave, so you always need to be prepared.

A primary method of recruitment is Career Builders, Ad placement, and run dates are important, but a greater concern is content. You want to design your ad to entice a person that neither knows you nor your business practices to come in and hear what you have to offer.

Also, look for recruiting referrals from employees and customers. A simple "career opportunities available" sign at the front of the office can inform your customers in an unobtrusive manner that you are looking for qualified employees.

[See Property Management Employment Manual](#)

Set up accounting/payroll systems

Several procedures are used to monitor the flow of business.

Using payroll forms, quarterly taxes report forms and time sheets are part of the financial bookkeeping necessary to maintain approved employment procedures in the most efficient and effective manner. Doing daily and weekly paperwork on schedule will prevent big headaches and financial problems in the future

We recommend using a third-party payroll service like Paychex, ADP or QuickBooks Payroll by Intuit.

<https://www.paychex.com/>

<http://payroll.intuit.com/>

www.adprun.com

Tax Reporting Summary

Your payroll provider will supply the appropriate tax reporting that may apply to your office. We recommend that you contact your provider for a complete breakdown.

Obtain employer tax identification number

If you employ one or more persons, you are required to withhold income taxes and Social Security from each employee's paycheck and remit these amounts to the proper taxing authority.

You will need to obtain an employer tax number from the Internal Revenue Service using IRS form SS-4. Call the Employer Identification department of the IRS located nearest you. They will send you your federal I.D. number as well as payroll charts, quarterly and annual forms, W-4 forms, tax-deposit forms, and an instruction manual on filling out forms. No advance fees or deposits are required.

California will issue their own tax ID number through the CA Employment Development Department (EDD). Your accountant, lawyer or payroll service can help get this accomplished. Check out their web site at [www.edd.ca.gov/Payroll Taxes](http://www.edd.ca.gov/Payroll_Taxes)

Insurances

Insurance Checklist

You can purchase insurance to cover almost any risk. Business owners most commonly use the following types of coverage:

Property Insurance (basic policy):

- Fire, extended coverage, Vandalism, malicious mischief, windstorm and hail.

Additional Property Insurance (optional, or may be required by leasing agent)

- Flood
- Plate glass -- covering window breakage
- Boiler -- covering damage caused by boiler explosion

Liability Insurance

- Public liability -- covering injury to public (customers, pedestrians)
- Malpractice -- covers claims from guests who suffer damages due to your services.
- Errors and omissions -- covers against claims from guests who suffer damages because of errors you've done, or things you failed to do.

Employee Insurance

- Worker's compensation
- Fidelity bonding -- covering theft by employees
- Life insurance
- Health insurance
- Disability insurance
- 401-K plan

Business Insurance

- Fraud insurance -- covering bad checks, counterfeit money, larceny
- Business interruption -- covers loss of income and extra expense in event of fire or other catastrophic loss.

Vendor Insurance

- All vendors to name the property owner, the franchisee and the franchisor as additional insured in order to perform work on a property. (Proof of insurance required)

Setting up Brand Marketing

How to Edit the Branding of the Owner Presentation

You will need to open the Owner Presentation File within Microsoft Powerpoint

[Click Here to Watch a Video Tutorial](#)

How to Open the Slide Master



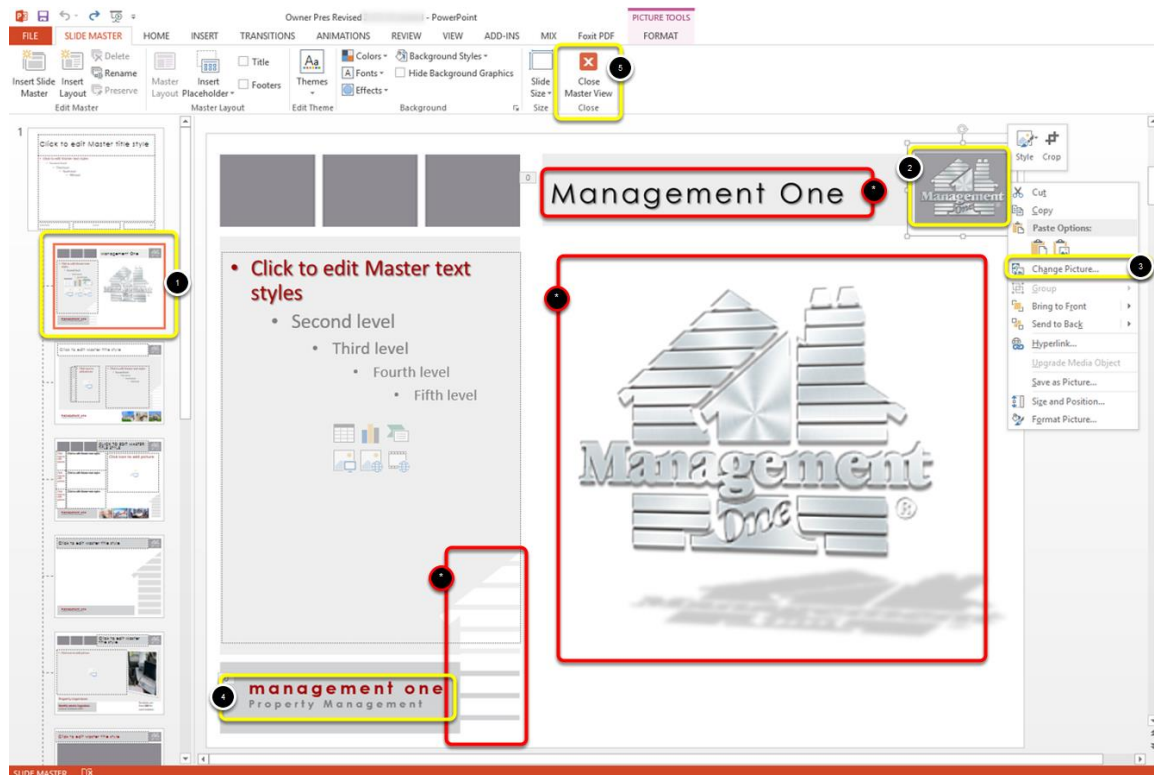
In MS Power Point:

1. Select **View** from the Top Navigation Menu
2. Then Select **Normal** from the View Ribbon
3. Next Select the Slide you want to edit by click on the **Thumbnail View** to the Left
4. Then Select **Slide Master** from the View Ribbon

Note: This will take you right to the Layout within the Slide Master for the Particular Slide you have Selected.

However, once in the Slide Master you have access to all of the Layout Versions used in the Presentation, and can edit them without having to select each slide. (for example, this Presentation has 13 Layout versions, but it has 58 Slides; you will only need to edit the 13 Layouts and in doing so the 58 slides will be updated.)

How to Edit the Brand Elements in the Slide Master Layouts



TO FULLY CUSTOMIZE THE PRESENTATION TO YOUR BRAND, YOU WILL NEED TO CHANGE THE LOGO AND NAME IN EACH OF THE 13 SLIDE LAYOUTS.

From the Master View:

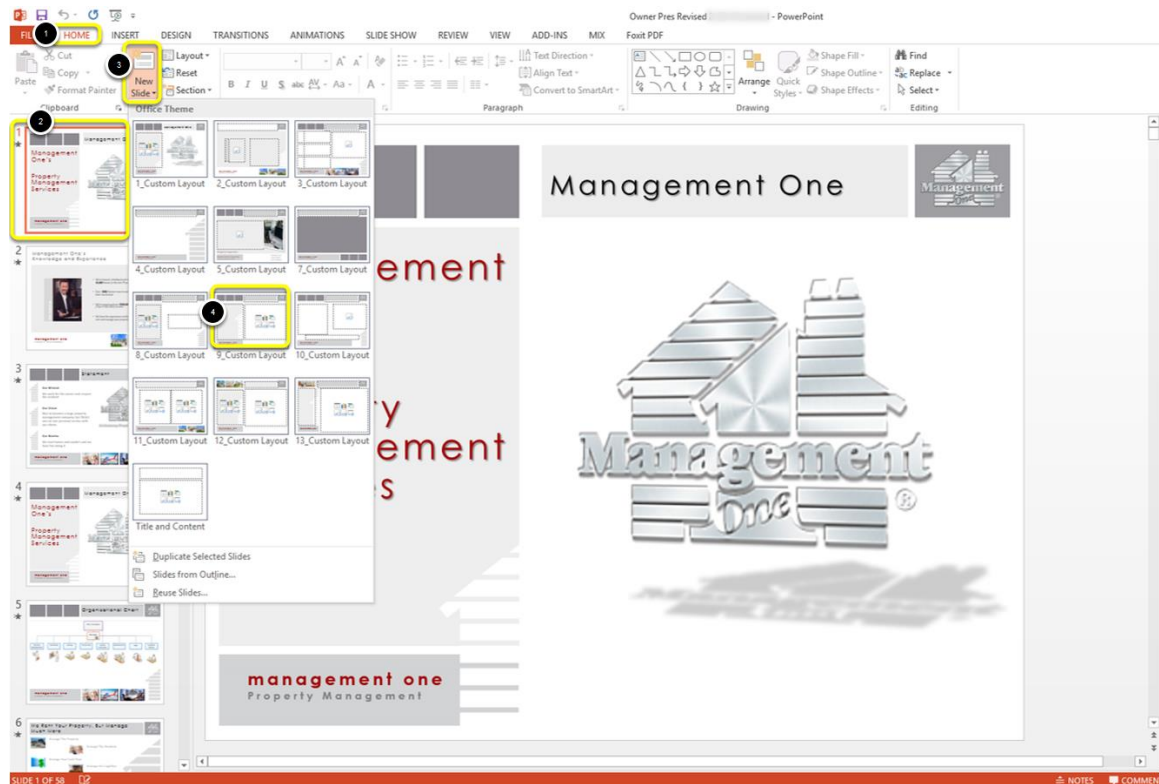
1. Select the **Slide Layout** you want to edit by clicking on the **Thumbnail View** to the Left
2. Then Select the **LOGO** element, by right clicking on it
3. Select **Change Picture** from the right-click menu (this will allow you to select a new picture to replace it with, while keeping the same formatting [i.e. size, shadow, 3D effect, etc])
4. Then **Place your cursor** on the Company Name Footer, **to edit the Text**
5. When you are done, Select **Close Master View** from the View Ribbon

Note: Any time a layout has been modified in the Slide Master, this will change any slides in your presentation that are using that layout.

In this way, you only need to make the change once, but it can effectively update multiple slides with that one action.

* These other items, outlined in red, can be changed in a similar fashion as the previous instruction indicates, or they can be deleted from the layout. However, this can only be done in the Slide Master as these items are not editable in the Presentation View.

Add a New Slide Using the Existing Theme Slide Layouts



In MS Power Point:

1. Select **Home** from the Top Navigation Menu
2. Next Select the Slide that you want the new slide to appear after, by clicking on the **Thumbnail View** to the Left
3. Then Select **Add Slide** from the Home Ribbon
4. Choose the **Slide Layout** you want to use, from the expanded Office Theme Menu

Note: The new slide will appear after the slide you have highlighted to the left.

Owner Presentation Brand Customization

How to Edit & Customize the Branding of the Owner Powerpoint Presentation

[Click Here to View a Step-by-Step Tutorial Article](#)

Video - Owner Presentation Brand Customization



[Click here to watch Video in a Browser](#)

Setting up Your Office, Work Stations, and PI Van

Office Layout for a facility Managing 700 doors

This is an overview of how an office can be Setup and laid out to accommodate all the Work Stations and Divisions needed to properly manage 700 doors using the Management One Licensed Operating System.

Video - Office Layout 700 Doors



[Click here to watch Video in a Browser](#)

Accounting Division Work Station

This is an overview of how the Work Station is Setup for the Accounting Division using the Management One Licensed Operating System.

Video - Accounting Division Work Station



[Click here to watch Video in a Browser](#)

Leasing Division Work Station

This is an overview of how the Work Station is Setup for the Leasing Division using the Management One Licensed Operating System.

Video - Leasing Division Work Station



[Click here to watch Video in a Browser](#)

New Property Accounts Division Work Station

This is an overview of how the Work Station is Setup for the Marketing & New Property Accounts Division using the Management One Licensed Operating System.

Video- New Property Accounts Division Workstation



[Click here to watch Video in a Browser](#)

Maintenance Division Work Station

This is an overview of how the Work Station is Setup for the Maintenance Division using the Management One Licensed Operating System.

Video - Maintenance Division Work Station



[Click here to watch Video in a Browser](#)

Yard Signs in the Property Inspector's Van

This video will provide you with an overview of how to set up your maintenance vehicle to accommodate the breakdown of parts for the Yard Signs, including Posts and Ryders.

Video - How to Set up Yard Signs in the Property Inspector's Van



[Click here to watch Video in a Browser](#)

The Property Inspector Van & Its Components

In this Instructional Video you will be shown How your Property Inspector Vehicle needs to be set up so you can work very effectively in the field.

[For Measurements of Component Part, Click Here](#)

Video - PI Van and Its Components



[Click here to watch Video in a Browser](#)

Van Supply List - Excel

Items Per Van	Re-order if less than	Min on Board	Inventory	Ordered	Price
Tools:					
White spray paint		2	0		\$ 6.50
Fix a flat		2	0		\$ 5.99
Smoke sabre		2	1		\$ 5.93
Zip ties		1	0		\$ 22.00
WD40		2	0		\$ 8.00
Bolt cutter		1	0		\$ 21.99
Nuts		25	0		
Thumb Bolt		10	0		
Eye bolt		10	0		
Crossbar Bolt					
Allen wrench		2	0		
Boxes of blank keys		2	0		
Key machine		1	0		
Sledge Hammer		1	0		\$ 9.99
Auger Drill		1	0		\$ 80.00
Spray bottle		3	0		\$ 1.95
Screwdriver		2	0		\$ 1.69
Signs:					
For Rent		7	0		
Arrows		10	0		
Signs		5	0		

[See Excel File](#) for a full list of items needed

Office Manager Work Station

This is an overview of how the Work Station is Setup for the Office Manager using the Management One Licensed Operating System.

Video - Office Manager Work Station



[Click here to watch Video in a Browser](#)

Insurance Reference

Curt Bulloch Insurance Group

Home & Auto
Home, Auto & Life Insurance are more than important. They're essential to the continued financial safety of any family.

Business Insurance
Businesses and corporate entities see more lawsuits than anybody else these days. Protect your business with the right insurance.

Event Insurance
Insure yourself, your guests, and your event partners and vendors safety and well being. Secure peace of mind today through event insurance.

Surety Bonding
Surety bonds guarantee that you will meet your contractual obligations. With surety bonding, businesses can compete for contracts.

Curt Bulloch

Insurance Agent/Broker

CA Ins Lic. #0I36002 Bail Agent Lic. 1E80348 Notary Commission No. 2086211

Direct: 925.640.0485

Fax: 925.405.0642

www.curtbulloch.com

Licenses and permits

Apply for licenses and permits

Permits

You will not be allowed to operate in an area not zoned for your business, unless you first have a Variance or Conditional Use permit. Your contractor and landlord should assist you with information on these permits and determine whether or not you will need them.

Fire Department Permit

Many local fire departments require businesses to obtain a permit if it uses any flammable materials, or if customers or the public at large will occupy the premises. In some cities, you must secure a permit before you open for business. Other jurisdictions do not require a permit. Instead, periodic inspections of the premises are scheduled to see if you meet regulations. If you do not, a citation will be issued.

Sign Permit

Many areas have instituted sign ordinances that restrict the size, location and sometimes the lighting and type of sign used.

County Permits

County governments often require essentially the same types of permits and licenses that cities require. These apply to commercial enterprises located outside city limits. County regulations are often less strict than those of adjoining cities.

Apply for Business License


Before you can operate your Property Management® office, you must obtain a business license from the City in which your office will be located. It's important to take care of this as soon as you have a definite address for your office. Go to your local City office and file the proper documents with the City. They will provide local instructions and forms.

Business License

Business License: Most business license departments are operated as tax collecting bureaus. You simply pay a fee to operate your business in that city. In addition to the license fee, some cities receive a percentage of your gross sales. Your application for a license will probably be processed through the planning or zoning department, which will check to make sure you may operate an office there, and that there are enough parking places to meet the code. You should not encounter many problems if you are opening your business in an existing structure that previously housed a similar business.

Sample of Business License

CITY OF NEWPORT BEACH
REVENUE DIVISION
BUSINESS LICENSE APPLICATION
3300 NEWPORT BOULEVARD, P.O. BOX 1768
NEWPORT BEACH, CA 92658-8915
(714) 644-3141 FAX (714) 644-3073



BUSINESS LICENSE NUMBER _____

BUSINESS NAME MANAGEMENT ONE BEACH-SIDE
34 SPACES MAXIMUM

BUSINESS ADDRESS 620 Newport Center Dr. SUITE 117E

CITY Newport Beach STATE CA ZIP 92660

BUSINESS PHONE (714) 781-6695 SELLER'S PERMIT # _____

MAILING ADDRESS SAME SUITE _____

CITY _____ STATE _____ ZIP _____

STATE LICENSE # _____ TYPE _____ EXPIRATION DATE _____

TYPE OF BUSINESS Property management.

THIS BUSINESS IS A (check one)

Sole Ownership Social Security of Owner # _____

Partnership Partnership Tax I.D. # _____

LLC Tax I.D. # _____

Corporation Corporate Identification # _____ STATE _____

STATE/FEDERAL (circle one) EMPLOYER IDENTIFICATION # _____

CITY LAW REQUIRES THE FOLLOWING INFORMATION ON ALL PRINCIPALS, IF NECESSARY
PLEASE ATTACH A LIST OF ADDITIONAL PRINCIPALS.

NAME Rennie W. Sudman DRIVER'S LICENSE # _____

RESIDENCE ADDRESS _____

CITY _____ STATE _____ ZIP _____ PHONE _____

NAME _____ DRIVER'S LICENSE # _____

RESIDENCE ADDRESS _____

CITY _____ STATE _____ ZIP _____ PHONE () _____

BUSINESS TAX CATEGORIES: (These fees are annual taxes and must be paid with the application)

THIS BUSINESS IS LOCATED OUTSIDE THE CITY OF NEWPORT BEACH \$157.00

THIS BUSINESS IS LOCATED AT A RESIDENTIAL LOCATION IN THE CITY \$99.00

THIS BUSINESS IS LOCATED AT A COMMERCIAL LOCATION IN THE CITY \$104.00 PLUS
AN ADDITIONAL \$ _____ x _____ (See reverse side for instructions)
(# of employees)

NUMBER OF EMPLOYEES (ONLY FOR BUSINESSES LOCATED IN THE CITY) _____

I HEREBY CERTIFY UNDER THE PENALTY OF PERJURY THAT I AM AUTHORIZED TO MAKE THIS
STATEMENT, AND THE INFORMATION PROVIDED ON THIS APPLICATION IS TRUE AND CORRECT.

Rennie W. Sudman
applicant's signature name printed

APPLICANT'S TITLE (OWNER) DATE 10-24-97

Apply for a fictitious business name (DBA)

Before you can operate your office, you must obtain a fictitious business name or DBA. Usually this is done at the County level. It is important to take care of this as soon as you have a definite address for your office. Go online to your local County Clerk or Records office and file proper documents with the County in which they will provide local instructions on publishing requirements.

DBA

Sole proprietors and partnerships may choose distinctive names for their businesses. However, you will be required by the county, city or state to register your fictitious name. Procedures vary -- in many cities, you need only to go to the county offices and pay a registration fee to the county clerk. Other cities and counties require placing a fictitious name ad in a local newspaper. Generally, the newspaper that prints the legal notice for your business name will file the necessary papers with the county for a small fee. The easiest way to determine the procedure for your area is to call your bank and ask if it requires a fictitious name registry or certificate in order to open a business account. If so, ask where you should go to obtain one.

Fictitious name filings do not apply to corporations in most states. Documents of incorporation have the same effect for corporate businesses as fictitious name filings have for sole proprietorships and partnerships.

Note: You may not include the registered mark "Property Management®" as part of your corporate name.

Sample of Fictitious Business Name Statement

GARY L. GRANVILLE
 COUNTY CLERK-RECORDER
 CIVIC CENTER PLAZA, ROOM 106
 POST OFFICE BOX 238
 SANTA ANA, CA 92702-0238


FICTITIOUS BUSINESS NAME STATEMENT

Print legibly or type all information and DO NOT ABBREVIATE.

THE FOLLOWING PERSON(S) IS (ARE) DOING BUSINESS AS:

1.	Fictitious Business Name(s) <i>MANAGEMENT ONE BEACH-SIDE</i>	Business Phone No. <i>(714) 721-6600</i>
1A.	<input checked="" type="checkbox"/> New Statement <input type="checkbox"/> Refile—List Previous No. <input type="checkbox"/> Change	
2.	Street Address, City & State of Principal place of Business State Zip Code (Do NOT use a P.O. Box) <i>620 NEWPORT CTR. DR. 11TH FL., NB, CA 92660</i>	
3.	Full name of Registrant (If Corporation, enter corporation name) <i>RONNIE W. JUDMAN.</i>	If Corporation/L.L.C. State of Incorporation or organization
	Res./Corp. Address (Do NOT use a P.O. Box) City State Zip Code	
	Full name of Registrant (If Corporation, enter corporation name)	If Corporation/L.L.C. State of Incorporation or organization
	Res./Corp. Address (Do NOT use a P.O. Box) City State Zip Code	
	Full name of Registrant (If Corporation, enter corporation name)	If Corporation/L.L.C. State of Incorporation or organization
	Res./Corp. Address (Do NOT use a P.O. Box) City State Zip Code	
4.	(CHECK ONE ONLY) This business is conducted by (<input checked="" type="checkbox"/> an individual () a general partnership () a limited partnership () an unincorporated association other than a partnership () a corporation () a business trust () co-partners () husband and wife () joint venture () Limited Liability Co. () Other—Specify _____	
5.	Have you started doing business yet? Yes _____ Insert the date you started: _____ No <input checked="" type="checkbox"/>	NOTICE: THIS FICTITIOUS NAME STATEMENT EXPIRES FIVE YEARS FROM THE DATE IT WAS FILED IN THE OFFICE OF THE COUNTY CLERK-RECORDER. A NEW FICTITIOUS BUSINESS NAME STATEMENT MUST BE FILED BEFORE THAT DATE. THE FILING OF THIS STATEMENT DOES NOT OF ITSELF AUTHORIZE THE USE IN THIS STATE OF A FICTITIOUS BUSINESS NAME IN VIOLATION OF THE RIGHTS OF ANOTHER UNDER FEDERAL, STATE, OR COMMON LAW (SEE SECTION 14400 ET SEQ., BUSINESS AND PROFESSIONS CODE).
6.	If Registrant is NOT a corporation, sign below: (See instructions on the reverse side of this form.) Signature <i>Ronnie W. Judman</i> _____ (Type or Print Name)	If Registrant is a corporation, an officer of the corporation signs below: If Registrant is a limited liability company, a manager or an officer signs below. Limited Liability Company Name/Corporation Name _____ Signature and Title of Officer or Manager _____ Print or Type Officer's/Manager's Name and Title _____
(THIS FEE APPLIES AT THE TIME OF FILING) FILING FEE \$31.00 FOR ONE BUSINESS NAME \$7.00 FOR EACH ADDITIONAL BUSINESS NAME. \$7.00 FOR EACH ADDITIONAL PARTNER AFTER FIRST TWO. PROVIDE RETURN STAMPED ENVELOPE IF MAILED.		

Sample of Affidavit of Publication

<p>AFFIDAVIT OF PUBLICATION</p> <p>STATE OF CALIFORNIA</p> <p>COUNTY OF ORANGE</p>	<p>Space Below for filing Stamp Only.</p>
<p>I am a citizen of the United States and a resident of the County aforesaid. I am over the age of eighteen years, and not a party to or interested in the above entitled matter. I am the principal clerk of the Newport Beach Light, a newspaper that has been adjudged to be a newspaper of general circulation by the Superior Court of the County of Orange, State of California, on January 23, 1997 Case No. A-185909 in and for the County of Orange, State of California; that the notice of which the annexed is a true printed copy, has been published in each regular and entire issue of said newspaper and not in any supplement thereof on the following dates, to wit:</p>	<p>ORIGINAL FILED COUNTY CLERK ORANGE COUNTY</p>
<p>November 6, 13, 20, 27, 1997</p>	<p>Proof of Publication of</p>
<p>I declare under penalty of perjury that the foregoing is true and correct.</p>	<p>FICTITIOUS BUSINESS NAME STATEMENT</p>
<p>Executed at Lake Forest, Orange County, California, on</p>	<p>FICTITIOUS BUSINESS NAME STATEMENT 19973708070 The following business is (was) doing business as MANAGEMENT ONE BRANCH OFFICE 233 NEWPORT COE DR. 11TH FL. NEWPORT BEACH, CA 92660 Full Name of Registrant L. RONNIE W. SUDMAN 407 Sleepy Hollow Ln. Laguna Beach, CA 92653 The business is conducted by an individual. The Registrant commenced to conduct business under the Fictitious Business Name of MANAGEMENT ONE BRANCH OFFICE on October 30, 1997. At RONNIE W. SUDMAN This statement was filed with the County Clerk of Orange County on October 30, 1997. Publishing: Newport Beach Light Nov. 6, 13, 20, 27, 1997 17-176 199708030</p>
<p>Date December 1st, 19 97</p>	
<p> Signature</p>	
<p>Newport Beach Light 22481 Aspan St. Lake Forest, CA 92630 (714) 454 - 7380</p>	

Set up with Vendors Setting up your Vendor Database

For all the information on how to Locate, Interview, Screen & Contract with Vendors for maintenance items, please refer to the [Vendor](#)

Manual. However, you can access many of the needed Vendor Manual Articles by clicking on the Article Links below.

[How to Find Local Vendors](#)

[Script For Calling Vendors](#)

[Vendor Interview Sheet](#)

[Reference Check on Vendors](#)

[Getting Started with General Vendors](#)

[Checklist of Items for a General Vendor](#)

[Getting Started with Rehab Vendors](#)

[Checklist of Items for a Rehab Vendor](#)

[Contractor Sign-up Paperwork](#)

[W9 Form](#)

[Insurance Tracking](#)

[How to Add a New Vendor in the M1 Solutions Software](#)

Marketing

Establish your Marketing Plan

There are several items that you will need to complete in order to have a successful marketing program.

Join Chamber of Commerce

We recommend that you join and participate in your Chamber of Commerce or other service organizations. Invite your Chamber of Commerce to your Grand Opening Day festivities ask about a ribbon cutting ceremony. Civic involvement is an excellent means of networking and marketing.

Discovery of Competition

Make a List of all your local competitors. Call around “incognito” to find out your competitors fees and any other info you can glean from them. This is important for two reasons. First so you will know how to position yourself in the marketplace among other management companies. Second, so you can solicit other management companies to acquire accounts, even during your pre-opening. See [Excel Attachment](#) to use and questions to ask.

Initial Marketing Setup

Start on the setup of the 12-month marketing plan. See Marketing manual for details as many of these items you will complete after pre-opening.

See [Excel Attachment](#) for full list items needed.

Set Up Website

Contact Four and Half at www.fourandhalf.com. They are a company that caters to property management companies. They will help you set up your website, establish your PPC campaign (pay per click with Google), establish your Social Media campaigns and more. Corporate has utilized their services as well.

Processes

One Touch System

The One Touch System has been designed to provide order to one's day and reduce any feeling of being overwhelmed.

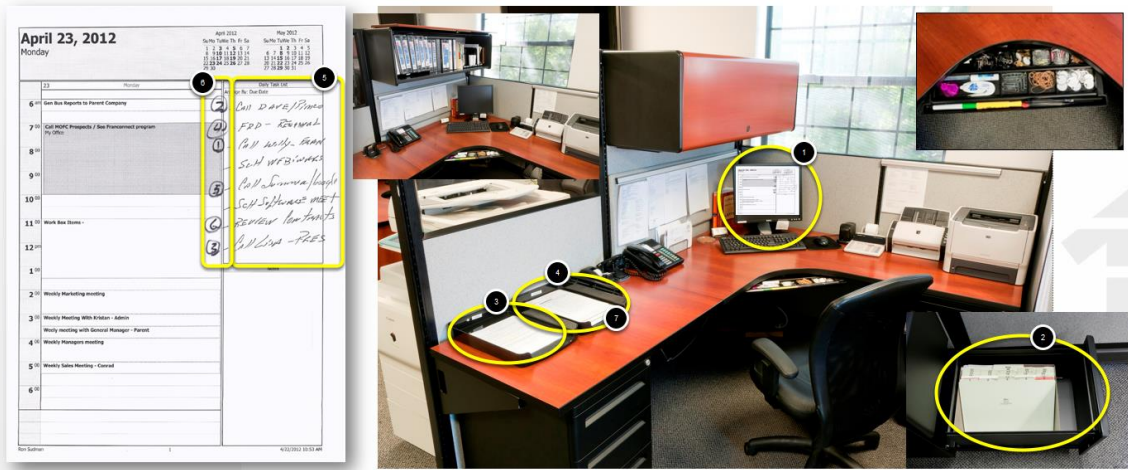
It's in the name...only Touch the Paper/file once, work it as far as you can take it, then move on to the next item.

The goal is to process through as much of the Stack of files in your Work Box as possible, eventually having an empty Work Box.

However, if at the end of the day there are a few items left, leave them in your Work Box. They will just take a higher priority for completion the following day.

The following day you will start over, beginning with the Steps of the One Touch System.

One Touch System Outlined



One Touch System

1. Run out **Outlook Calendar**
2. Pull items out of **Tickler File**
3. Take items out of **In Box**
4. Take items out of **Work Box**
5. **Write Out** all Priority items combined from Tickler, Work Box & Inbox
6. **Prioritize** your outlook 1-6
7. Place all Combined Items in **Work Box for the day**. *(Any new Items will be placed in the Inbox and will wait to be addressed the following day)

Then, start with first item and go as far as you can go then either:

- A) File it
- B) Throw it away
- C) Set up in tickler if you're waiting for a call back
- D) or Tickler it for a future date

Spending 15-20 min a day organizing your work for the day and week will keep you from feeling you don't have enough time to get your work done and you won't be overwhelmed.

Contributing Factors that Lead to feeling Overwhelmed

1. Doing things 3 times instead of once (Don't cut corners and Do it right the first time)
2. Not following the system and doing things out of order and having to back track
3. Getting complaints due to not following systems
4. Team members not being consider of other team players when they are out for the day and not calling in on time and being in the daily meeting. When this is not done pressure increases and complaints increase again taking up more time, thus making you feeling overwhelmed.
5. Not asking for managements help when you need it before you are drowning to guidance and assistance but not to do the actual work. (Use your life lines)

Keyboard System

The keyboard is a color coded board which is labeled with the property address on each tag along with 3 hooks for sets of keys and relevant tags. The Color coded sections denotes the current level of occupancy/vacancy and correlates directly with 3 reports;

1. (ILR) Internal Leasing Report
2. (RML) Resident Move-in Ledger
3. (COL) Close-Out Ledger

Keyboard Color Code



The keyboard is organized and segregated by 5 Colors which correlates directly with 3 reports; (ILR) Internal Leasing Report, (RML) Resident Move-in Ledger & the (COL) Close-Out Ledger; as well as denotes the current level of occupancy.

Orange- Owner occupied

Blue- Vacant

Green- Tenant occupied

White- Rented/Move-in

Yellow - Closeout

Color Categories Explained

Orange Label- **Owner occupied**

Owner is still occupying property so you cannot check out keys to this property to anyone and the property must be personally shown (3 sets of keys on the board at this time) (the property address & the scheduled move out date to be noted on the tag)

Blue Label - **Vacant**

Property is vacant (please note the Property Inspector must walk the property before it's deemed vacant; an owner or a resident turning in keys is not considered vacant and details of this will be covered in training as to why) (2 sets of keys and a red tag on the board at this time) The property inspector will change the keys to a Blue Tag once the first walk through has been completed.

Green Label - **Tenant occupied**

Current Resident is still occupying the property so you cannot check out keys to this property to anyone (there would only be 1 set of keys on the board at this time) (The property address & scheduled move out date to be noted on the tag)

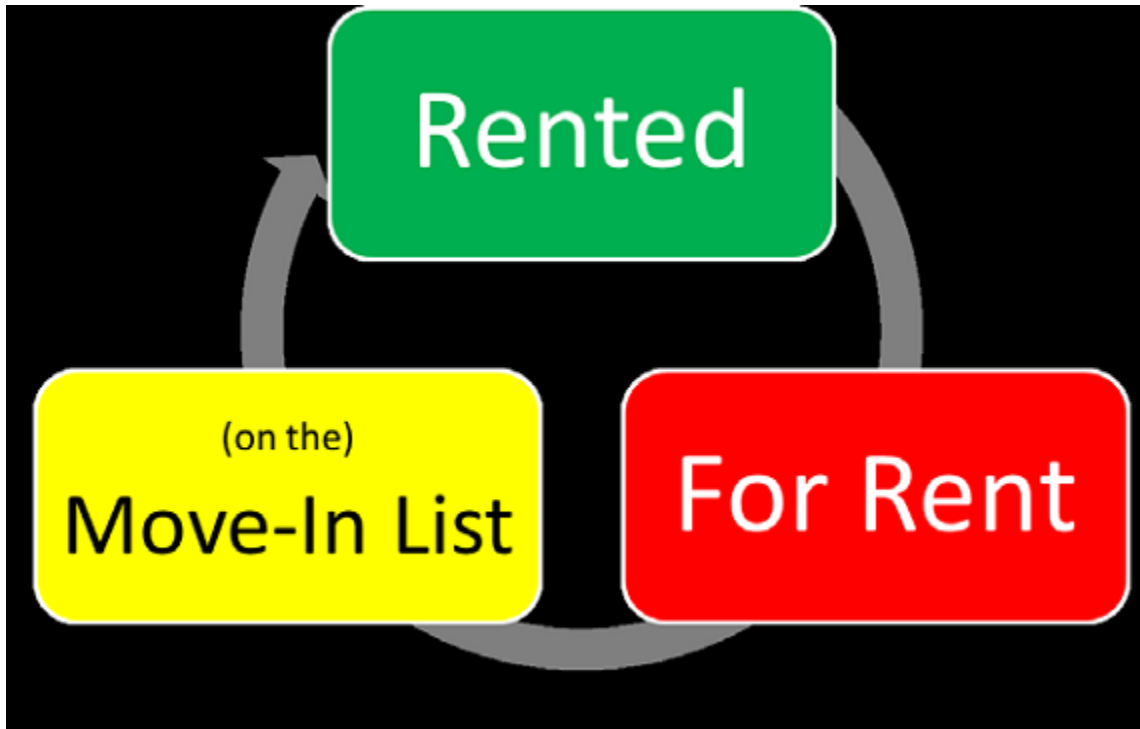
White Label - **Rented / Move-in**

Property is rented and waiting for the new resident to move in (1 set of keys if the property is still occupied; 2 sets of keys and a red tag if the property is vacant) (the property address & the scheduled move in date to be noted on the tag)

Yellow Label - **Closeout**

These tags are for all properties that are being closed out after a resident moves out. (the property address & scheduled move out date to be noted on the tag)

Key Board Statuses & Rental Categories



There are only 4 statuses a property will be in, within our inventory.

1. For Rent
2. Move-in
3. Rented
4. Closeout

There are only 4 categories that properties will come from, "for rent", and will either have an (NPO) New Prospective Owner sheet or a (BOM) Back on Market sheet.

(N) New Accounts-NPO

(R) Re-rent-BOM

(E) Evictions-BOM

(B) Breaking of Lease-BOM

Additional Tags

White Tag with Writing ("Keys to be made") New Account

If Owner Occupied - An Owner is to turn in 3 sets of keys when the sign as a new account, however if the owner only has one set to turn in, the keys will be placed on the board with two tags that state "Keys to be Made" until the Property Inspector has been able to make copies.

White Tag with Writing (R - OCC) Resident Occupied

If Resident Occupied - When a property is a "Back-on-Market" or a "Closeout", then the one set of keys, kept on file in the office, will be placed on the board with two tags that state "Keys to be Made" until the Resident vacates and turns in the two sets they have.

White Tag with Writing ("Staff Member's Name") Keys are Checked Out

If a Staff member has checked keys out for a Showing or to Personally Show, they would replace the key set with a key tag that has their name on the board so that anyone can see who is responsible for the keys that are checked out.

White Tag with Writing ("Owner") Keys are Checked Out

If the property is Vacant, and the Owner has decided to manage the Rehab himself, he would then checkout a key from the office or may have his contractor check a key out. For each set of keys checked out, they would be replaced with a tag stating "Owner" so you know the owner has them. A checkout key form would also have been signed by the owner or their contractor.

3 sets of keys with White Address Tags (V - VAC) Vacant


The Occupant has vacated and all keys are on the board

Red Tag- Lockbox on property

One set of keys is taken from the board placed in a lockbox secured at the property on the front door. The Keys on the board are replaced with a Red Key Tag (this is only on vacant properties, once the First Walk Through (FWT) has been performed by the Property Inspector)

M1 Rehab Algorithm "For Rent" Inventory Tool

M1 Rehab Algorithm "For Rent" Inventory Tool

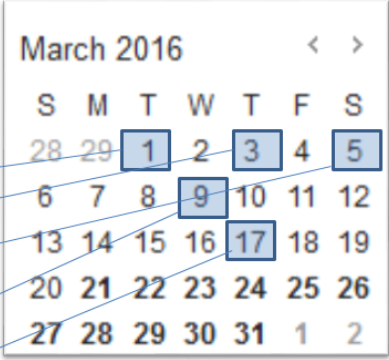


LMS (Leasing Maintenance Status)
Availability Date

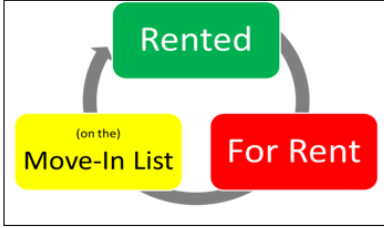
(Status codes correspond to each number of days remaining)

- OCC (Occupied) - 17 calendar days to move in
- FWT (First Walk Thru) - 15 calendar days to move-in
- WF (Waiting for Funds) - 12 calendar days to move-in
- **WBDO (Work Being Done by Own)** - 12 calendar days to move-in
- WBD (Work Being Done by Mgt One) - 8 calendar days to move-in
- COM – (Ready - Can Move in Anytime) - 0 days until move-in

For Total Transparency to all Staff



Powered by
Management One
Property Management



This Algorithm is used to determine the Date a property can be Available for a Resident to take possession.


To work this Algorithm, one must count down or count backwards, meaning on day one (i.e., the property is Vacant and the Property Inspector can perform his initial [FWT] First Walk Through) the schedule affords 17 days until the property is available for move-in.


As the schedule progresses each status acts as a milestone with a certain number of days afforded for that phase in the process. It will be very apparent if there is an issue in meeting the deadline to make this property available by the calculated date, if the property status does not correlate with the calculated days in the process. For example, if today's date is the 11th, and the property is committed to a New Resident to be ready on the 17th, then the status needs to be (WBD) Work Being Done in order to be on schedule. If the Status is still (WF) Waiting Funds from the owner, then the number of days available for the contractors to complete the work and the time needed for the Property Inspector to perform his Final Walk Through is now

M1 Rehab Algorithm "For Rent" utilizing the Resident Move In Ledger (RML)

M1 Rehab Algorithm "For Rent"

Integrate with M1Software

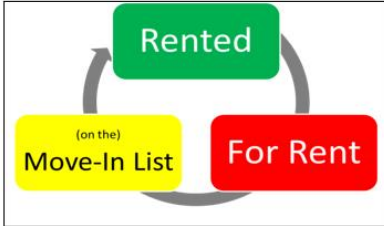




Management One Moreno Valley
 23846 Sunnymead Blvd. #10
 Moreno Valley, CA 92553
 Phone:951-924-4315 Fax:951-924-7241

Resident Move In Ledger
 April 25th 2016

Address	Rented	LMS	Proj. MID	Leasing REP	Occupancy	Mapgrid
21370 Shakespeare Ct. Moreno Valley 92557	10/25/2012	COM	11/12/2012	Marco	VACANT	716H1
25193 Billie Dr. Moreno Valley 92553	10/17/2012	WBDO	11/12/2012	Cindy	VACANT	717G7
15147 Calle Renfro Moreno Valley 92551	10/23/2012	COM	11/15/2012	Marco	VACANT	747H1
12213 Orchid Ln #C Moreno Valley 92557	11/1/2012	COM	11/20/2012	Marco	VACANT	717F2



Key Board Protocol

-All Properties must correlate their position on the board with their Occupancy Status and reflect their availability dependent on their (LMS) Leasing Maintenance Status as indicated in the (ILR) Internal Leasing Report and (RML) Resident Move In Ledger.

-Every property on the key board must have 3 key tags

-New Accounts must have 3 sets of keys- if only 1 set is given, then there should be two tags which state "keys to be made" until they are made and hung on the keyboard.

-Back on Market (BOM) Properties will have 1 set of keys (from the office filing cabinet) and the other 2 hooks will have key tags which note "Resident Occupied".

-Occupied status address labels will state the potential move-out / vacancy date.

-When a resident turns in all keys, the address tag and keys are not moved from "Green" to "Blue" until the Property inspector has walked the property and changes the (LMS) Leasing Maintenance Status on the (ILR) Internal Leasing Report, from "OCC" to "FWT". The same goes for Owner occupied property; From "Orange" to "Blue".

-When a property changes to (FWT) First Walk Thru status, one set of keys are taken off the key board and placed into a lock box which is left on the door knob of the rental property. This key hook is then marked with a "Red" key tag to note that a set of keys are in a lock box at the property.

-If the owner or his vendor needs a set of keys, one will be taken off the board and replaced with a key tag that states "Owner" to note the owner has a key.

-All keys must be signed out before released.

-If a key is taken off the board or checked out to a prospect by a staff member, the set of keys must be replaced with a key tag with notes the staff member's "Name" whom removed the keys.

-Only keys for "Vacant" status properties can be checked out to prospective residents. All prospects must have been pre-screened prior and must provide a photo ID, give a deposit for the keys and sign the (AIS) Applicant Interview Sheet which states they are not taking possession of the home.

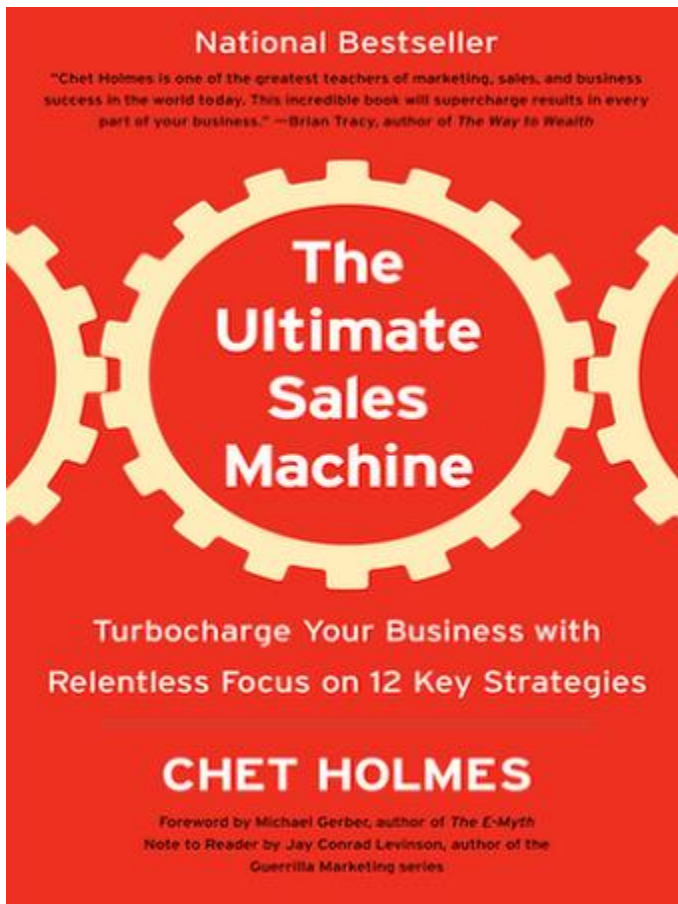
-Any property on the board may change status to "White" once a Holding Agreement is signed with a new prospective resident and the property is considered Rented and waiting for Move-in. The vacancy date is then replaced with the projected Move-in date on the address label.

Recommended Reading

Books Recommended to Read

Below are several resources I have found over the years and incorporated into my success. I highly recommend that you read them as well, and I feel you will find them to be a benefit to your development and success for the future, as I have.

"The Ultimate Sales Machine" - by Chet Holmes



<http://www.chetholmes.com/ultimate-sales-machine>

And the insights prove it. A masterpiece of insights, wisdom and step-by-step instruction to build The Ultimate Machine. A machine implies a level of precision and that's exactly what you'll take away from this book: How to turn your company into a precision-like sales machine. This is where nothing is left to chance.

In most companies, the majority of the sales process is not well defined. In Chet's book, he lays out the fourteen strategic objectives you should have for every sales interaction. Most companies have two or three strategic objectives that are met in a sales interaction, and those two are three are not even well defined; they are haphazard and left too much to chance.

The basic idea:

Becoming a master is not about doing 4000 things. It's about doing 12 things 4000 times. Over his thirty-year career at the top of the

sales and marketing fields, Chet Holmes has worked like a machine himself to boil down all you'll ever need to know into 12 skill areas that make you a master. And to make your life easy, he has divided the book into 12 chapters, each focusing on the skill you need to master. Written with great examples and practical stories, you will find this book, and it's writing to be artful and entertaining (so say the other famous authors below).

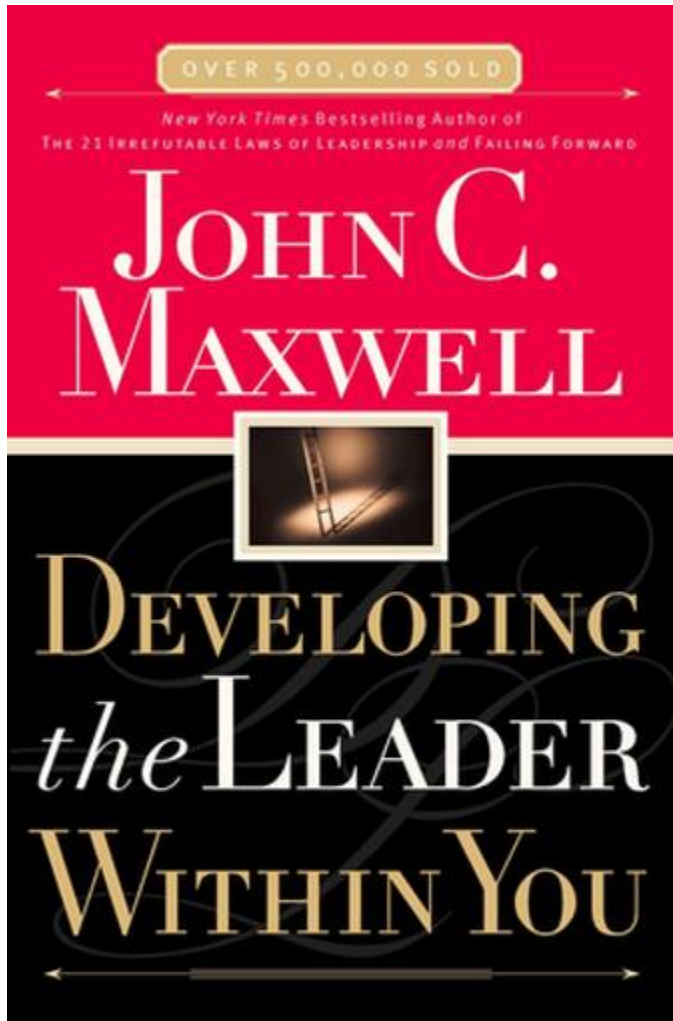
The end result:

The end result of this rather spectacular book is that you will get a lifelong blueprint to absolutely mastering the art of how to market, manage and sell like a machine. And in the end, no company will be able to stand against you. That is the ultimate promise. NO company will be able to compete with the company that masters the material in this superbly crafted book. You will take the business you want from whomever you want to take it and they will be powerless to stop you. You will pre-empt your competitors at every turn, even at a higher price.

[Preview a chapter now!](#)

[Buy the book right now and start benefiting from Chet's breakthrough strategies!](#)

"The 21 irrefutable Laws of leadership" - by John Maxwell



<http://www.johnmaxwell.com/store/products/Developing-the-Leader-Within-You.html>

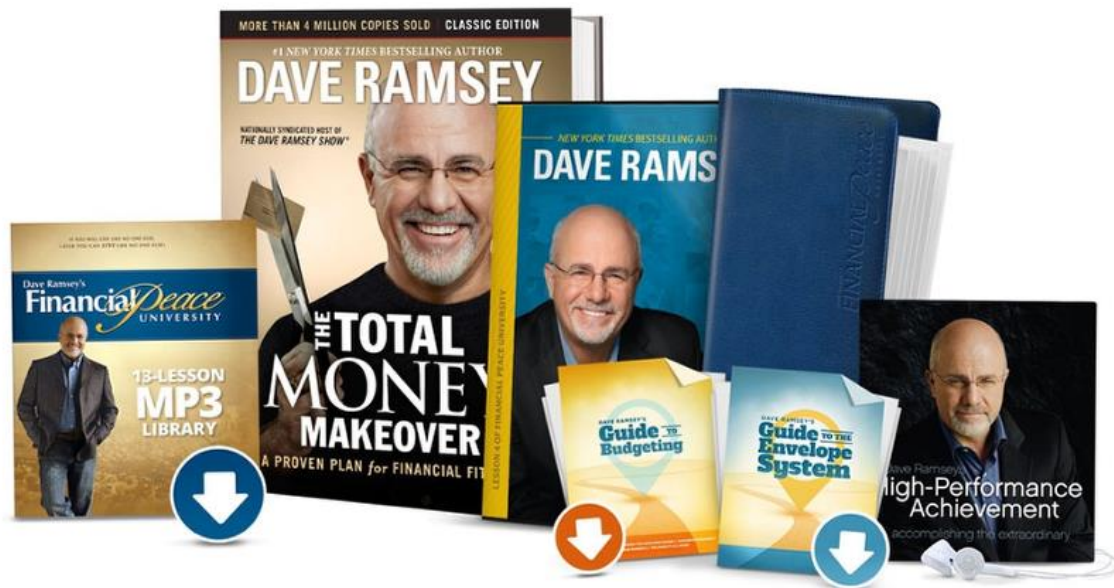
Make A Defining Difference in the Lives of Those Closest to You.

Whether you find yourself leading 2 people or 200, you feel the responsibility of training them to achieve all that they are capable of becoming.

In this endearing volume, Dr. John C. Maxwell shares his heart for developing exceptional leaders.

Timeless principles applied in your life - and the life of your organization - will bring about positive change through personal integrity and self-discipline. Updated and revised, this resource is a must have for anyone in, or desiring to be in leadership!

"Destroy Debt Bundle" - by Dave Ramsey



<http://www.daveramsey.com/store/prodD022.html>

This special bundle is just what you need to start the Baby Steps, destroy debt, and start saving this year! If you want to get serious about destroying your debt, learn exactly how to do it and keep going strong with a book, audio lessons, DVD, and more!

The Total Money Makeover

Dave's teaching is condensed into 7 organized, easy-to-follow steps that will lead you out of debt and into a Total Money Makeover.

13-Lesson Audio MP3 Download

Listen to 13 audio lessons from Dave covering virtually everything he teaches on getting out of debt, saving for the future, buying a home, investing, college, and more. Note: This is a MP3 download approximately around 600 megabytes. It will be delivered in your order confirmation email.

Starter Envelope System

Try a simple way to manage your household income and expenses and avoid spending more than you earn!

Dave Ramsey's Guide to Budgeting (PDF ebook)

This new resource will help you get started with a budget! The guide takes you through the spending plan process from the ground up, step by step.

Dave Ramsey's Guide to the Envelope System (PDF ebook)

This handy guide will explain exactly how to use the included envelope system to reign in your spending and keep your budget under control!

High-Performance Achievement

This audio lesson is a quick primer for anyone wanting to not just meet goals, but accomplish big goals that most people won't think are possible. If you're ready to accomplish the goals that only "successful" people reach, this lesson is a must-have.

Dumping Debt DVD

In this core Financial Peace University lesson, Dave shows you how to become debt-free as he walks you through the necessary steps and details of dumping debt with the Debt Snowball method.

Coaching Books & Audios - by Tony Robbins



6 TONY ROBBINS INSIGHTS
THAT WILL CHANGE YOUR SALES GAME

1. KNOW YOUR PURPOSE
You **MUST** have a sense of meaning. Bring an idea of what you need to get done to the office everyday. It will make the biggest impact you can imagine.

2. GIVE POSITIVE MEANING TO EVERYTHING
Don't be afraid to take risks. Through wins and losses, your response is key. Learn from both to improve your sales process and create more future opportunities.

3. REALIZE THAT EVERYTHING YOU DO HAS A CONSEQUENCE
Each and every interaction between sales rep and customer leaves a impact. Make sure they're positive. There's no neutral in sales. Know your strengths and speak to them.

4. KNOW THAT EVERYONE IS UNIQUE, DIFFERENT, AND AMAZING
Be aware that not everyone is like you. Competitors and buyers will not always behave the way you expect- or want. And that's okay. Keep your head up and realize that everyone has meaning.

5. BE DRIVEN BY YOUR DESIRE FOR ADVENTURE
It's important to know what motivates you. Be it your past, your successes, or even your fears, be aware of what makes you tick.

6. EXPECT THE UNEXPECTED
Sales aren't always predictable. How will you respond when something unexpected happens? Be flexible and respond to changes with ease.



There are too many to mention here, but he has products discussing and coaching you through many of the important aspects of life we so often neglect. The aspects warrant your attention, not only for your success but also for you to enjoy your efforts, and I highly recommend any of the products Tony has to offer.

<https://www.tonyrobbins.com/products/>

[**Personal Growth and Development Products**](#)

The Ultimate Edge - A 3- Part System for Creating an Extraordinary Life in Any Environment

In this powerful 3-part Ultimate Edge audio program, Tony Robbins will personally coach and passionately entertain as you begin to discover what you truly want most in your life. Implement the same personal and professional development strategies and tools Tony uses for achieving his own goals, as you learn the methods to help unlock obstacles that may be holding you back.

Health, Energy & Fitness Products

Living Health - 10 Steps to Creating the Health, Vitality and Energy You Deserve

What good is having powerful goals if you don't have the energy to carry them out? Anthony Robbins' Living Health system will teach you how to adopt a set of simple, enjoyable and powerful principles to create a physically vital life, one where you'll reignite the passion in your physical relationships and access the energy required to take your career and finances to the next level.

You can learn specific steps to increase your energy levels and achieve your physical fitness goals. Tony also coaches you on effective nutritional and psychological strategies to bolster your immune system and improve your health. It's time to take charge and seize the optimum health and energy you deserve now!