**Signing Up a New Account - Sign Up Packet\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

These items need to be prepped prior to meeting with an owner up (face to face).

1. Your Power Point Presentation… Over the phone will be put on the web (gotomeeting.com)
2. NPO… that you have begun to fill out in m1 Solutions Software
3. Your company’s 12 x 13 Glossy Folder
4. Client Registration and Property Checklist
5. CRA (Certified Rental Appraisal)
6. Good Faith Estimate
7. Management Agreement
8. W-9 form for IRS
9. Insurance Example
10. Cleaning List
11. 56 Type of Turbulences
12. Referral Fee Program form
13. Key Tags
14. Direct Deposit Form
15. Directory of staff for your office

**Additional or deleted items if it’s a sign up over the phone/internet and procedure**

1. Cover letter
2. Less Management One Glossy Folder #3

Note prior to telephone appointment it is recommended that you email all the documents to the owner.

**New Accounts Division – Checklist for new account signing**

**Items to make sure you get at the appointment:**

1. Management Agreement, initial and sign where indicated
2. W-9 form filled out and signed. One person only; verify Social Security # or EIN is legible
3. Completely Fill out Client Registration Form
4. Owner Initials on Rating System form (discussing the grade you give the property based on the

current condition you view during this appointment)

1. All ancillary documents signed (Direct Deposit forms, Utility, etc.)
2. Collect $250.00 Maintenance Deposit to open Trust Account + Advertising if applicable (per ppty)
3. 1 copy of each key(s) to Property(s) - including mailboxes if applicable –Minimum 1 set of each
4. Garage remotes – If any (One is mandatory if a garage opener is installed)
5. Take photos of the property
6. Warranty Information on all appliances (A/C Units, Water Heater, Etc. Home Protection

Plan Name and # of company. Need when warranty or plan expires, MANUALS NOT NECESSARY)

1. Homeowners Association rules, (short version) pool keys and contact information for the HOA Management Office
2. A copy of current lease if you have a tenant in the property now (s) If any
3. Security deposit held for current tenant – If any
4. Indicate how you would prefer to be communicated with – E-mail – Fax - Phone

**Items to verify in New Prospective Owner file (NPO) prior to turning account into operations:**

1. Verify Appt. date, Appt. time and Appt. Status filled out
2. Update Status to Signed
3. Update Listing details (Hot Buttons, Leasing Disclosures, Rehab & Accounting notes)
4. Confirm all amenities are filled in
5. **Verify that all items from 1-14 from above checklist (at appointment) have been completed and**

**Packaged for operations**

1. Turn in to Operations to activate account

**Operations Division:**

**Search for SIGNED status to locate NPO then activate account from NPO and add to operations**

**Property Detail - Once account has been added to operations update the following in Property Detail:**

1. Contract Start and Finish date
2. Contract Term
3. Map Grid
4. Annual inspection month (if applicable)
5. Monthly Exterior (if applicable)
6. Alarm code and gate code (if applicable)
7. Property type
8. WO limit amount
9. Look up Latitude/Longitude for web
10. Home Warranty information (if applicable)
11. HOA information (if applicable)
12. Add any Work Order Special Conditions (if applicable)
13. Load photos for Leasing / Advertising
14. Verify all Owner Fees
15. Enter the high/low rent rate
16. Confirmall amenities are filled in

**Owner Detail - Proceed to Owner Detail and update the following:**

1. Confirm 1099 is checked off
2. Update all contact information
3. If check is being sent via Direct Deposit or to bank update the Bank information

Proceed to Command Center and upload all documents to the file cabinet under Owner Agreements

Note: if your office is set up on an ACH account, add the property with the M1 property number and owner information to the list of accounts for direct deposit.