

New Client Checklist

Property Address \_\_\_\_\_

City \_\_\_\_\_

Zip \_\_\_\_\_

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

Land Lot \_\_\_\_\_

District \_\_\_\_\_

Lot# \_\_\_\_\_

Subdivision \_\_\_\_\_

Owner's Name \_\_\_\_\_

Owner's Mailing Address \_\_\_\_\_

City \_\_\_\_\_

State \_\_\_\_\_

Zip \_\_\_\_\_

Owner's Tele #'s

Home # \_\_\_\_\_

Work# \_\_\_\_\_

Cell # \_\_\_\_\_

Other # \_\_\_\_\_

Present Tenant Name & Tele #'s (or Vacant) \_\_\_\_\_

Home # \_\_\_\_\_

Work # \_\_\_\_\_

Cell # \_\_\_\_\_

Home Warranty \_\_\_\_\_

Termite Bond \_\_\_\_\_

HVAC Service \_\_\_\_\_

Any Codes, ie: garage door \_\_\_\_\_

Master on Main? \_\_\_\_\_

Utilities: \_\_\_\_\_

\*\*\*\*Owner's Tax ID # (or SS #)\*\*\*\*

OWNER'S E-MAIL ADDRESS

Bedrooms \_\_\_\_\_

Baths \_\_\_\_\_

Living Rm \_\_\_\_\_

Dining Rm \_\_\_\_\_

Great Rm \_\_\_\_\_

Basement \_\_\_\_\_

Garage \_\_\_\_\_

Fence Yd \_\_\_\_\_

Vaulted Ceilings \_\_\_\_\_

Stories \_\_\_\_\_

Fireplace \_\_\_\_\_

Gas Logs \_\_\_\_\_

Ceiling Fans \_\_\_\_\_

Appliances Included: \_\_\_\_\_

Laundry Closet \_\_\_\_\_ or Room \_\_\_\_\_

Who is responsible for yard work until tenant moves in? \_\_\_\_\_

Schools:\*\* \_\_\_\_\_

Brief Description of Property: \_\_\_\_\_

Directions: \_\_\_\_\_

Items Checklist

Keys \_\_\_\_\_ Garage Door Openers \_\_\_\_\_ Pool/Clubhouse Keys \_\_\_\_\_

Any items left with property ( curtains) \_\_\_\_\_

Rent - Price Range: \$ \_\_\_\_\_ to \$ \_\_\_\_\_

Available: \_\_\_\_\_

Pets: \_\_\_\_\_ Smoking: \_\_\_\_\_

*AUTHORIZATION AGREEMENT FOR DIRECT DEPOSIT*

*I hereby authorize Preferred Realty Services to initiate a credit entry to my checking /savings account indicated below at the depository named below. .*

*Depository Name* \_\_\_\_\_

*Branch* \_\_\_\_\_

*City* \_\_\_\_\_

*State* \_\_\_\_\_ *Zip* \_\_\_\_\_

*Routing Number for ACH* \_\_\_\_\_

*Account Name* \_\_\_\_\_

*Account Number* \_\_\_\_\_

*Type of Account* \_\_\_\_\_

*This authorization is to remain in full effect until Preferred Realty Services has received written notification from me of its termination in such time and in such a manner to afford reasonable time to act upon it.*

*By* \_\_\_\_\_

\_\_\_\_\_

*Date* \_\_\_\_\_

**PLEASE ATTACH A VOIDED CHECK TO THIS FORM!!**