



PROPERTY MANAGEMENT CHECKLIST FOR NEW PROPERTIES

Essential Documents and Items for Smooth Transfer

Owner(s): _____

Property Address: _____

Property Documentation

- ☐ Completed Property Management Agreement
- ☐ Completed Property Information Form
- ☐ Completed Landlord Utility Agreements (known as revert to owner clause)
- ☐ Disclosure of Information on Lead-Based Paint and/or Lead-Based Paint Hazards (if property was constructed prior to 1978)
- ☐ Completed W-9 (this is for whoever will be receiving the 1099)
- ☐ A copy of the HOA Rules & Regulations (if the property is located within a HOA) – an emailed PDF is preferred over a hard copy. If you don't have these, please contact your HOA management company for a copy.

Keys and Access

- ☐ House Keys: 2 sets (SGPG will supply 2 DO NOT DUPLICATE keys to go to the new tenants, original will be retained by us).
- ☐ If the property is already occupied by tenants, please provide us with 2 keys for our use. Keys Provided ____
- ☐ Mailbox Keys (if applicable): Please provide 2 keys. 1 will go to the tenants, and 1 will be retained by us. Keys Provided ____
- ☐ Pool/Clubhouse access key (if applicable). Please leave this in the kitchen drawer closest to the refrigerator. Keys Provided ____



- ☐ Garage Remotes: Please place 2 working remotes in the kitchen drawer closest to the refrigerator. Remote Provided ____

Appliances and Manuals

- Leave any operational manuals for appliances, security systems, thermostats, etc. in the kitchen drawer closest to the refrigerator.
- Copies of any recurring bills you would like us to pay (lawn service, utilities, etc... - we do not pay mortgages, insurance, HOA's or taxes).

Insurance

- ☐ Insurance COI (Certificate of Insurance) showing Stone Gate Property Group LLC as additional insured. (Your insurance broker can email this directly to us):
Admin@stonegate-property.com

Tenant Information (if applicable)

- ☐ Tenant's Applications
- ☐ Tenant's Lease
- ☐ Tenant's Security Deposit
- ☐ Tenant's Account Statement
- ☐ Tenant's Contact Info
- ☐ Tenant's move-in inspection

Cleaning (Vacant properties)

The following items are expected to be professionally cleaned prior to moving in a tenant. If you need help finding a contractor to do the cleaning, please let us know.

- ☐ All appliances inside and out, behind, and underneath.
- ☐ All cabinets and drawers inside and out.

- ☐ All light fixtures, all bulbs must be present and working.
- ☐ All baseboards, door casings and trim.
- ☐ All window coverings and blinds.
- ☐ All ceilings and walls as needed.
- ☐ All heating units; vacuumed as necessary. Filters cleaned or replaced.
- ☐ Fireplace, woodstove and hearth area.
- ☐ All plumbing fixtures (sinks, tubs, showers, toilets, and faucets).
- ☐ All shower tiles, tubs and enclosures including tracks and doors.
- ☐ All windows inside including windowsills and tracks.
- ☐ All interior and exterior doors inside and out including tracks.
- ☐ All porches, decks, patios, walkways and garage swept and cleaned.
- ☐ All floors swept and mopped (waxed if necessary).
- ☐ Professional carpet cleaning.

**The following must also be completed:*

- ☐ Lawn and grounds trimmed, mowed, and beds weeded if applicable.
- ☐ Any not in use satellite dishes removed from exterior of property.
- ☐ Batteries must be present and working in smoke and carbon monoxide alarms.
Alarms older than 10 years MUST be replaced.
- ☐ Furnace serviced and filters changed.
- ☐ Wood burning fireplaces cleaned and inspected.
- ☐ Touch up paint or repaint where needed (interior and exterior).
- ☐ All nail holes filled and painted where needed.

****Below information only required if transferring from a different property management company****

To ensure a smooth transfer from your current property management company, please provide the following information:

Current Property Management Details

- ☐ Name of Company: _____
- ☐ Name of Current Property Manager: _____
- ☐ Phone: _____
- ☐ Email: _____
- ☐ Time Zone/Office hours: _____ / _____

Financial Details

- ☐ Rate Currently Paid in Management Fees:
- ☐ Current Rent for Occupied Units:

**Please ensure that all the information is accurate and up to date to facilitate a seamless transition.*

Stone Gate Property Group LLC

512 Northampton St

Edwardsville, PA 18704

(570) 539-9105

Admin@stongate-property.com