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PROPERTY MANAGEMENT TRANSITION CHECKLIST FOR COMMERCIAL PROPERTIES

**Sample Letter**

Management

To Vendors Regarding New Owner

Date

Vendor Name

Address

Address

Dear \_\_\_\_\_\_\_\_\_\_\_\_\_\_,

Effective \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, Property One, Inc. has been selected to provide property management services for the \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_office building(s) located at \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

All future correspondence, communication, etc. with regard to the property should be directed through our office located at \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_and my telephone number is \_\_\_\_\_\_\_\_\_\_\_\_.

All invoices should be in the name of (\_\_\_\_\_\_\_\_\_\_\_\_) c/o Property One, Inc.

If you have any questions, please feel free to contact me. We look forward to working with you in the future.

Yours truly,

Property Manager

**Contract Brief**

 Property:

 Date:

Contractor Name:

Address:

Phone Number:

Contact Name:

Address:

 (if different from above address)

Phone Number:

 (if different from above address)

Contract Type:

Performance Schedule (When and what is done):

Term:

Cancellation policy:

Cost per month:

Insurance: Workmen's Compensation Carried yes/no

 Certificate on file yes/no

 Employer's Liability yes/no

 Certificate on file yes/no

 Comprehensive General Liability yes/no

 Certificate on file yes/no

 Contractual Liability yes/no

 Certificate on file yes/no

**Existing Employee Evaluation Form**

1. Name:

Address:

Phone #:

Birthday:

1. Position:
2. Length of time with existing management company
3. Length of time with project
4. Current Salary $
5. Next review per existing company policy
6. Current vacation eligibility per existing company policy
7. Attitude
8. Appearance

10) Educational Background

1. Job Knowledge
2. Does existing employee wish to remain with property? Yes\_\_\_\_\_\_\_\_\_ No\_\_\_\_\_\_\_\_\_\_
3. Property One, Inc. Management recommendations for employee:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
4. If employee is not appropriate to remain at property, should he/she transfer to another Property One, Inc. property? Yes\_\_\_\_\_\_\_\_\_\_\_\_ No \_\_\_\_\_\_\_\_\_\_\_\_\_
5. General Comments: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature of Property Manager conducting interview:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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

**Property Status**

The following is a basic checklist of items indicating the status of the property at the time of the takeover:

Name of property:

Address:

Gross square feet

# of Units

(if applicable)

Occupancy

Monthly Rent

Rolls $

# of Tenants

Past Due Rent

Past Due Rent $

Past Due Invoices $

General Physical

Condition

Interior:

Exterior:

Available yes/no

Survey available yes/no

**Capital Projects Performed**

|  |  |  |
| --- | --- | --- |
| **Year** | **Project** | **Cost** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

**Preventative maintenance program**

Has one been maintained? Yes/no

Review of current preventative

 maintenance program