



1. Ownership Entity Name

2. Ownership Names

Owner 1 First & Last Name

Owner 2 First & Last Name

Owner 3 First & Last Name

Owner 4 First & Last Name

3. Owner Preferred Phone Number

Owner 1 Phone Number

Owner 2 Phone Number

Owner 3 Phone Number

Owner 4 Phone Number

4. Owner Email Address

Owner 1 Email

Owner 2 Email

Owner 3 Email

Owner 4 Email

Multi-Family Onboarding Questionnaire

5. Percentage Ownership

Owner 1 Ownership %

Owner 2 Ownership %

Owner 3 Ownership %

Owner 4 Ownership %

6. Ownership Entity Mailing Address

Address

Address 2

City/Town

State/Province

ZIP/Postal Code

Country

7. Ownership Entity Billing Address (Leave Blank If Same As Mailing Address)

Address

Address 2

City/Town

State/Province

ZIP/Postal Code

Country

Multi-Family Onboarding Questionnaire

8. Monthly Reporting & Statements (What statements do you want to see on a monthly basis)

Owner Statement

Rent Roll

12 Month Cash Flow

Bill Detail

Work Order Summary

Monthly Income Statement

12 Month Income Statement

General Ledger

Other (please specify)

9. Tax Identification Number/EIN

I wish to provide my Tax ID Number over the phone

I wish to provide my Tax ID Number via email

10. Banking Information

I wish to provide my banking information over the phone

I wish to provide management my banking information via email

11. Subject Property Address

Property Name

Address

Address 2

City/Town

State/Province

ZIP/Postal Code

Multi-Family Onboarding Questionnaire

12. Property Info

Assessors Parcel
Number (APN Located
on Your Property Tax Bill)

Additional APN
(Optional)

Number of Units

Date of Construction
(DOC)

Location of Water
Shut Off

Location of Electrical
Main

Location of Electrical
Subpanels

Trash Pick Up Days

Onsite Parking Spaces

Onsite Garages

Onsite Storage
Gate Codes

Location of Onsite

Keys/Access

Location of Mailboxes

Multi-Family Onboarding Questionnaire

13. Asbestos and Lead Disclosure

Lead Materials

Asbestos Materials

I have knowledge of
my property containing

14. Property Specific Maintenance Notes (Please provide contact info for your preferred vendors **OR** type "IPA" If You Would Like To Use Management's Preferred Vendors)

Preferred Landscaper

Preferred Tree

Trimmer/Arborist

Preferred Pool

Technician (Optional)

Preferred Plumber

Preferred Electrician

Preferred Pest Control

Preferred Appliance

Repair Tech

Other

Multi-Family Onboarding Questionnaire

15. Property Maintenance History

Date of Last Roof
Inspection

Date of Last Building
Jetting (Main Sewer
Lines)

Date of Last Plumbing
Inspection (Camera)

Date of Last Tree
Trimming

Date of Last Gutter
Cleaning

Date of Last Parking
Lot Slurry/Stripping

Date of Last Chimney
Inspection (Optional)

Multi-Family Onboarding Questionnaire

16. Property Utility Billing (Must Provide Management With W-9 & Owner ID To Transfer Water & SDGE Account)

SDG&E HM Account
Number (Found on the
top of billing statement)

Water/Sewer Provider

Recycling/Trash
Provider

Utility Accounts Paid
By Owner

Utility Accounts Paid
to Tenants

17. Contracted Services

Laundry Service
Provider

Pest Control Service
Provider

Pool Service Provider

Landscape Service
Provider

Telephone/Internet
Phone Service Provider
(Service provider for
telephone call
entry box)

Fire Safety Service
Provider

Multi-Family Onboarding Questionnaire

18. Priority Billing

	Paid By
Property Taxes	
Insurance Paid	
Mortgage	
HOA (Optional)	

19. Tenant Security Deposits

	Held By
I am Requesting Tenant Security Deposits to Be Held By	

20. Property Pet Policy

	Allowed	Max # of Animals	Weight	Pet Deposit	Pet Rent
Dogs					
Cats					

Multi-Family Onboarding Questionnaire

21. Property Onboarding Checklist

Updated Rent Roll

Tenant Directory

Tenant Lease Agreements

Tenant Rent Increase Notices

Tenant Lease Renewal Addendums

Delinquency Report

Utility Documents

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