

**RENTAL CHECK LIST & PROCESS**

**STEP-BY-STEP FOR RENTAL CLIENTS:** Treat every case different.

**STEP ONE:**

* Get the lead
* ASK 3: 1. Their *NEEDS*2. *TIME*, when do they to MOVE-IN 3. *READY*to provide at least a "3 months" amount
* Send specific criteria MLS listing to tenant
* Request and know more about credit and background
* Show rentals (offer no more than 4 to show)
* Schedule all within one day and make sure to contact each rental's agent for approval of show time.
* Show the schedules listing accordingly
* Tenant accepts one of the rentals and wants to put an offer.
* Notify the leasing agent about CTL.
* Ask agent what does tenant need to provide in order to proceed for the leasing contract. (*Common docs are*: CTL, driver license, 2 pay slips - income, social security, credit score [association usually checks credit and background])

**STEP TWO:**

* Create a new contract to lease.
* CTL template is found in zip form.
* Download the CTL template.
* Upload in DocuSign and add all of your client's information and agreement
* Once completed make a copy for you and the listing agent. (Make sure to have the listing agent's email)
* Confirm with listing agent that CTL was received and request them to review and have it signed by the landlord.
* Tenant must email all credentials (as above in step one: driver license, 2 pay slips - income, social security, credit score)
* Tenant must give the first rent amount in a money order or check.
* Turn in the first month's rent and a disbursement form to the LUXE receptionist.
* Once landlord agrees and signs the offer. The listing agent will send you a lease.

**STEP THREE:**

* Lease and association begins.
* Sometimes the listing agent will attach the Application for association to the lease and they will send it off to the association.
* If lease is sent to you blank by listing agent, upload on DocuSign and set it up for the tenant to fill out and send back to you.
* Make sure the tenant has all the documents to move the process as quick as possible.
* Once completed make a copy for you and the listing agent. (Make sure to have the listing agent's email)
* *ASSOCIATION PROCESS:*
  + The tenant needs to fill and sign the application.
  + *NOTE*: to get application form, try in the MLS listing under doc icon, ask the listing agent or find out the association's phone number.
  + Tenant will need to be interviewed by the association.
  + Provide a possible fee in money order form, the lease, social security and any other credentials to process application.
  + Be interviewed.
  + Finally, get approved by them.

**STEP FOUR:**

* Final Walk Thru and Broker Sumo
* Once associations approves, next process in the *Final Walk-thru.*(available in Podio)*.*
* *FINAL WALK PROCESS:*
  + Tenant and landlord meet and exchange the security deposit and other fees in a money order for the keys to the rental.
  + Use forms as a tool to walk-thru the home and any remarks.
  + Both parties sign.
* *BROKER SUMO PROCESS:*
  + Login
  + New transaction
  + Add information regarding rental and tenant
  + DOCUMENTS tab: download each document as you go through the full process of the rental.
    1. CTL
    2. W9 Form (request from listing agent)
    3. LEASE
    4. WALK-TRHU
    5. Association Approval
    6. Disbursement Form
    7. ANY credentials of the client (tenant)
  + NOTES tab:
    1. Add listing agents address where she wants her commission check to be sent. (or they can pick it up at Luxe)
    2. Add walk thru was completed and approved.
    3. Add Association approved tenant.
  + Click the envelope icon to send to Luxe receptionist for final approval.