



2309 Rio Grande, Austin TX 78705
512-542-0050 office ~ 512-323-2855 facsimile
maintenance@uthomesearch.com | www.activeaustinmgmt.com

Dear Investor,

Following is a check list of all documents and information management will need to setup a new client account. All items below must be provided promptly. If an item listed below is not applicable, please indicate so with N/A.

1. Please provide owner(s) social security number(s) or tax ID to be used for the property; **(W-9)**.
2. Please provide owner(s) drivers license number(s). _____
3. Please provide owner(s) date(s) of birth. _____
4. Please provide bank name and account number for payments to be deposited.

5. Please provide a mailing address or an email address where monthly statements are to be sent.

6. Please provide owner(s) phone numbers (including cell phones, home numbers, work numbers and faxes).

7. Who do you designate as an emergency contact if we cannot reach you?

8. Please provide property insurance information.

9. Please provide warranty info, such as home owner's warranty and appliances. Please provide copies of each.
10. Please list all appliances and items being provided for tenant use.

11. Please provide HOA information and copy of CC&R's for future tenants.

12. Please provide name and address where property files and keys may be obtained.

13. Please list all codes for the property, such as alarm system and access gates.

14. Please list utility account numbers for which the owner is currently responsible for paying (i.e. gas, electric, water and trash).

15. Please list monthly vendor service, numbers and provide copies of contracts, such as gardener.

16. Please list monthly expenses for which Active Property Management is to pay, such as mortgage or HOA dues. (Please provide copies of most recent invoices).

On behalf of Active Property Management, welcome! We look forward to working with you!

Sincerely,
Autumn Leal
Property Supervisor