



Thank you for choosing **HomePointe**. In order to begin management we will need the following: A check for \$300.00 to be placed in your trust fund, keys, entry remotes (leave in kitchen drawer), rental agreement(s).

**Owner Information:** Phone(w) \_\_\_\_\_  
(h) \_\_\_\_\_  
Email: \_\_\_\_\_ Cell Phone: \_\_\_\_\_  
Name of owner: Last: \_\_\_\_\_ First: \_\_\_\_\_  
Street address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

**TIN / Social Security #:** \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ **Payee Name/dba** \_\_\_\_\_  
*Under penalties of perjury the above payee's TIN is correct, the payee is not subject to backup withholding due to failure to report interest and dividend income, the payee is a U.S. person, and the payee is exempt from FATCA reporting.* **Payee/Owner/Signature** \_\_\_\_\_ **Date** \_\_\_\_\_

Does anyone else get a monthly report? \_\_\_\_\_ if so, list equity % of each owner below. Each additional owner must sign and complete the above statement to satisfy the IRS.  
Owner #1 \_\_\_\_\_%, Owner #2 \_\_\_\_\_%, Owner #3 \_\_\_\_\_%.

Complete Authorization to send funds via ACH.

Amount on hold \$300.00 or \$\_\_\_\_\_. Security deposits are held in trust by HomePointe.

**Property Address:** \_\_\_\_\_ **City** \_\_\_\_\_ **Zip:** \_\_\_\_\_  
Recurring expenses **HP** is to pay: circle: Mortgages / Home Owners Association Dues / Gardener / Pool Service  
We will need vendor name(s), coupons, addresses, account numbers, amounts for any we are to pay.

**Existing Tenant information: (Use separate sheet for additional tenants)**

Tenant Name: \_\_\_\_\_ (include all adults)  
Address: \_\_\_\_\_  
\_\_\_\_\_, CA Zip \_\_\_\_\_

Current rent rate: \$ \_\_\_\_\_ Deposit \$ \_\_\_\_\_ Amount owing: \$ \_\_\_\_\_ Pd to date: \_\_\_\_\_  
Grace period: \_\_\_\_\_ Late fee: \_\_\_\_\_ Amount rent to be raised: \$ \_\_\_\_\_ Effective: \_\_\_\_\_  
Phone numbers: (w) \_\_\_\_\_ (h) \_\_\_\_\_

We will need the rental agreement for occupied property. If none do you want one? Yes/No

**If vacant, rent desired? \$** \_\_\_\_\_ **Deposit desired \$** \_\_\_\_\_

**We will need keys for your vacancy.**

How is maintenance handled? Call if over \$300.00 or \_\_\_\_\_.

Home protection plan? Yes/No New Home Warranty? Yes/No If yes Company: \_\_\_\_\_.

Plan No: \_\_\_\_\_ Claims Phone Number: \_\_\_\_\_

Insurance Co. : \_\_\_\_\_ Policy# \_\_\_\_\_

Agent name: \_\_\_\_\_ Phone # \_\_\_\_\_

Have you notified your insurance agent that your property is a rental? \_\_\_ Yes \_\_\_ No

Home Owners Association (if applicable) \_\_\_\_\_

Address of HOA: \_\_\_\_\_

Phone of HOA: \_\_\_\_\_ Email of HOA \_\_\_\_\_

We will need any common area keys and remote controls. Access Code for gated roads: \_\_\_\_\_

Owner signature \_\_\_\_\_

\_\_\_\_\_ Date

**Owner Questionnaire**

A) Property address: \_\_\_\_\_ Date built: \_\_\_\_\_  
Are there any components not in normal operating condition at the above address? \_\_\_yes \_\_\_no  
If yes, then describe: \_\_\_\_\_

- B) Are you aware of any of the following at the above address?
1. Substances, materials, or products which may be an environmental hazard such as but not limited to mold, asbestos, formaldehyde, radon gas, lead-based paint, fuel or chemical storage tanks and contaminated soil or water on the property. \_\_\_Yes \_\_\_No
  2. Room additions, structural modifications, stairs, other alterations or repairs made without necessary permits, or not in compliance with building codes. \_\_\_Yes \_\_\_No
  3. Prior repairs or issues that might impact a current or future tenant? \_\_\_Yes \_\_\_No
  4. Flooding, drainage, or grading problems. \_\_\_Yes \_\_\_No
  5. Neighborhood noise problems or other nuisances. \_\_\_Yes \_\_\_No
  6. Homeowners Association with authority over property. Attach or send a copy of CC&R's to HomePointe. \_\_\_Yes \_\_\_No
  7. Notices of abatement/citations against property. \_\_\_Yes \_\_\_No
  8. Has anyone died on the property in the last three years? \_\_\_Yes \_\_\_No
  9. Would you like the property inspected for repairs, hazards, or damages? \_\_\_Yes \_\_\_No
  10. Are you storing anything inside, outside, or in a store room or shed? (we strongly suggest you not store anything at your rental) \_\_\_Yes \_\_\_No
  11. Is this property in default/foreclosure on any mortgage loan? \_\_\_Yes \_\_\_No
  12. Is this property registered with the local government agency as a rental? \_\_\_Yes \_\_\_No

**Marketing Information**

Cross Streets: \_\_\_\_\_

Directions: \_\_\_\_\_

Type of Property: Single family, duplex, condominium, 3, 4, 5-15, 16+ (circle one)

Alarm: Yes/No If Yes: Key/Code : #'s \_\_\_\_\_ Location: \_\_\_\_\_

Instructions: \_\_\_\_\_

Garage Door Opener: Yes/No If yes: # of controllers \_\_\_\_\_

Pool Service? Yes/No who pays? Owner/HomePointe Name: \_\_\_\_\_ Addr: \_\_\_\_\_ Amt: \_\_\_\_\_

Tenant pays gas, electricity and phone bills, but in Sacramento Valley most owners pay water/sewer/garbage.

Who is to pay water/sewer/garbage? Owner/HomePointe/Tenant. Owner must call utility companies to make changes.

Pets allowed? Yes/No (No=Can limit the market, over half of the population has a pet.)

Sprinklers Yes/No If yes, Type: Manual/Automatic

Type lease: \_\_\_\_\_ (12 months/6 months/month to month)

Bed/ baths	Heater	A/C	Floor	Stove	Gar	Levels	Laundry	Pet	Patio	Yard	Dish washer	Fam Rm	Frig	Fireplace	Sec. 8?	Sq ft
/																
/																

Microwave? Yes/No \*\* Gardener provided? Yes/No \*\* Other: \_\_\_\_\_

Owner certifies that the information herein is true and correct to the best of owner's knowledge as of the date signed by owner.

\_\_\_\_\_  
Owner Signature

\_\_\_\_\_  
Date

**For Agent Use:**

Digital photograph taken?

Yes / No

Sign installed?

Yes / No

Lockbox installed

Yes / No

# Lead Paint Disclosure: Disclosure of Information on Lead-Based Paint and Lead-Based Paint Hazards

Address: \_\_\_\_\_ CA \_\_\_\_\_

### Lead Warning Statement

*Housing built before 1978 may contain lead-based paint. Lead from paint, paint chips, and dust can pose health hazards if not taken care of properly. Lead exposure is especially harmful to young children and pregnant women. Before renting pre-1978 housing, landlords must disclose the presence of known lead-based paint and lead-based hazards in the dwelling. Tenants must also receive a Federally approved pamphlet on lead poisoning prevention.*

### Owner's Disclosure:

(a) Presence of lead-based paint or lead-based paint hazards **(initial one)**:

\_\_\_\_ Known lead-based paint and/or lead-based paint hazards are present in the housing (explain):  
\_\_\_\_\_

\_\_\_\_ Owner has no knowledge of lead-based paint and/or lead-based paint hazards in the housing.

(b) Records and reports available to the Owner **(initial those that apply)**:

\_\_\_\_ Owner has provided the Resident with all available records and reports pertaining to lead-based paint and/or lead-based paint hazards in the housing (list documents below).  
\_\_\_\_\_

\_\_\_\_ Owner has no reports or records pertaining to lead-based paint and/or lead-based paint hazards in the housing.

\_\_\_\_ Owner hereby notifies Agent that if they know of any lead-based paint or lead-based paint hazards at the property that Owner will immediately notify Agent so that Agent can disclose any known information to Lessee(s) and provide to Lessee(s) any records available. Agent may sign on behalf of Lessor all required disclosures and inform Lessee(s) of any known hazards or records pertaining to lead-based paint and lead-based hazards.

### Agents Acknowledgment (initial)

(c)  
\_\_\_\_ Agent has informed the Owner of the Owner's obligations under 42 U.S.C. 4852(d) and is aware of his/her responsibility to ensure compliance.

### Certification of Accuracy (initial)

(d)  
\_\_\_\_ The parties have reviewed the information above and certify, to the best of their knowledge, that the information provided is true and accurate.

Owner \_\_\_\_\_

Owner \_\_\_\_\_

Authorized Agent \_\_\_\_\_