

HomePointe
Property Manager Position Contract

10/12

Report to: General Manager

Subordinate: None, but work as a team with support staff

Job Objective: To meet company obligations to clients, residents, and vendors in the management of income property under contract. To secure new business on behalf of the company.

Results expected:

1. Maintain adequate portfolio of management to support the minimum salary for the position of Property Manager as outlined in Employment Contract.
2. Maintain vacancy factor at 5% or less. Inform supervisor of any vacancy exceeding 45 days to work out a plan to get that property rented.
3. Accept and process (or supervise the process) rental applications in accordance with company policy. Do not deviate from company policy without broker approval.
4. Prepare rental agreements and addenda. No resident is to move into a property without full payment of rent and deposits in the form of cashiers check, certified funds, or money orders. All agreements must be signed in advance by all adults that are to reside in the property.
5. Make sure that all buildings with 3 or more units are inspected monthly or declined by owner and a report is saved in our online database.
6. Make sure that all units are inspected on an annual basis or declined by owner.
7. All buildings under management to be maintained in accordance of habitability requirements and owner requests.
8. Keys controlled to company standards.
9. Marketing provided to clients per procedure and billed per procedure.
10. Every vacancy to have a recorded message, signage (if approved by client) and messaged followed up within one business day.
11. All funds under care of manager to be handled with utmost care. Never accept cash for rents or deposits.
12. Communicate with the owners so that owner knows what is being done at their property. Never conceal information from the owner. It is especially important to communicate during periods of vacancy, when repairs are being performed, and when rents are delinquent.
13. Market the company to maintain adequate portfolio.
14. Monitor and take action on delinquent payers on a timely basis.
15. Communicate to owners that owe funds. Request immediate payment.
16. Send reports on a timely basis to clients or make sure they are sent by support staff.
17. Never work on a property without a written management agreement on file.
18. Prepare for and attend all meetings scheduled by supervisor.
19. Document all messages, action taken, and schedule. Maintain this information and provide to supervisor on request. All vacancies and delinquents to have weekly notes maintained in company database. Houses/Condos in Property File for vacancies, others in Unit file; Delinquencies/Evictions in Tenant file.

HomePointe
Receptionist Position Contract

10/12

Report to: General Manager

Job Objective: To present a positive image to the public at the front desk. To meet company obligations to clients, residents, and vendors in the management of income property under contract. To provide support services for the office.

Results expected:

1. Present a professional image on the telephone and in person at all times.
2. To answer incoming telephone calls before the third ring and distribute them.
3. To type any correspondence as needed and insure all company outgoing correspondence is professionally presented and sealed.
4. To fax any documents requested by prospective tenants or clients the same day requested.
5. To send out company literature upon request the same day requested.
6. Run out-going mail through postage meter when available to do so.
7. Keep trays filled with forms for office use.
8. Print company vacancy list and showing schedule daily, post and deliver as requested.
9. Clean vacancy window, front door window, and front door daily.
10. Check Ext. 133 for messages needing to be transferred hourly.
11. Pick up, sort and deliver mail to staff.
12. Accept and log applications and fees and turn in copy of daily receipt at the end of each day.
13. Monitor supply needs each day and notify supervisor of any needs.
14. Take all outgoing mail to post office at the end of each day.
15. Make sure phone system is on voice mail at 12:00 to 1:00 and 5 pm to 9:00 am.
16. Perform all functions as outlined in Receptionist Job Commitments Checklist.

Standards

1. All work shall be documented, procedures used, and policies followed.
2. All work will be performed in accordance with all governmental laws, regulations, ordinances, and court rulings in those jurisdictions in which the company operates.
3. All residents, vendors, owners, and fellow employees shall be treated with professionalism and courtesy.
4. All company policies and directives of supervisor shall be adhered to supervisor shall be kept informed of any potential problem residents, vendors, owners, fellow employees, or situations that could adversely affect the property or company.
5. Dress in attire appropriate for the situation and in accordance with company requirements. Work area shall be maintained in a manner appropriate for all situations and accordance with company requirements.
6. No cash will be accepted for payment of rent at any time. The only cash that may be accepted is for application processing fees.

Dated in _____, CA this _____ day of _____ 20_____.

Signed _____
Employee

Signed _____
Employer 1.1.10

Property Manager Completes	
Begin day of move out	
Resident Name	
Address:	
Date keys turned in	
Verify Security Deposit	\$
If we don't have/do we need?	
Ask owner for funds if needed	
If We Need Funds, put a hold on owner draw	
Note Date Vacated/Est sheet Date	
Update m/o flow with actual m/o date	
File w/pending refunds / Pull 10th day	
Check Ledger/Maint for unpaid charges	
Check lease/ledger for w/s/g responsibility	
Print Check in/Check Out Form From Appfolio Tenant File	
Itemize & address checkout form	
Upload to S/Prop/Photos/M-out Name: YYMMDD SAM I23 MO	
Attach copies of invoices that go to tenant	
File to Accounting (14th day)	
Complete move-out flow/cut check	
Hide tenant(only if unit is not vacant)	
File to Office Manager	
Option 1 : Refund owed: Print R-94 (Appfolio)	
Mail Disposition letter with check & invoices	
Option 2: Res owes: Print R-95 (Appfolio)	
Mail Disposition letter with invoices	
Scan Entire Move Out File to Appfolio Tenant File	
File to Box for eventual shredding	
COLLECTIONS (circle)	Yes / No
Date submitted to Collections	
REVISED by manager	
Revision completed by Acctg	
Scan Revision to AppFolio Tenant File	
	7.2.2 11/15/13

Accounting Department Completes
<input type="checkbox"/> Check Trust balance/GL Accts to find location of funds Reporting>Saved Reports> AC-M/O Verify SecDep Continue only if SecDep amount is in 1120 & 2250 <u>or</u> 2280 GL Accts If NO SecDep amount in above GL accts - enter following chg/receipt using move-in date: <input type="checkbox"/> Enter tenant charge for amount of secdep to GL 2280 Owner Held SecDep <input type="checkbox"/> Enter tenant credit for amt of secdep to GL 2980 collected by Owner <input type="checkbox"/> Enter tenant -0- receipt to apply above charges <input type="checkbox"/> Confirm secdep amount is now in Owner Held SecDep GL account Go to Tenant (People - NOT "In Progress" tenant) <input type="checkbox"/> Verify additional roommates have not moved out yet if roommate moved out: hide roommate <input type="checkbox"/> Using "Tenant Unpaid Charges" report - compare chgs to disposition Delete or credit any charges <u>not</u> on the disposition Click on hyperlink>edit>correct or zero out the amount>save <input type="checkbox"/> Refresh the Unpaid Charges report and <u>keep open till end of ck list</u> Add a credit charge to each remaining unpaid charge with note: "unpaid amount added to move-out charges" in description of credit <input type="checkbox"/> Remove Eviction Status Find Tenant Move-out flow "In Progress" <u>DO NOT start another move-out flow</u> <input type="checkbox"/> Verify/enter forwarding address - "continue" <input type="checkbox"/> Verify/enter Actual Move-Out Date - "continue" <input type="checkbox"/> Add any "Tenant Unpaid Charges" from above using their original GL codes <input type="checkbox"/> Add any other charges from the disposition not included in Tenant Unpaid Charges (use GL 5660 for all added charges except for Broken Lease Fee-use GL 8120 and enter it as last chg <input type="checkbox"/> When the final amount matches the disposition "continue" (Click Yes for the warning about adding the transactions in the accounting system) <input type="checkbox"/> Print Disposition Letter - Add to Security Deposit File <input type="checkbox"/> Click "Remove from In Progress" <input type="checkbox"/> If unit is Vacant-don't hide tenants / hide tenants only if unit is Not Vacant Write check if resident is to get a refund <input type="checkbox"/> Go to Accounting>Payables>Write checks <input type="checkbox"/> Enter Bank/Property/All Payees <input type="checkbox"/> Check box for only the Tenant refund - "continue" <input type="checkbox"/> Print the check <input type="checkbox"/> Mark the Dep Checklist <input type="checkbox"/> If any Broken Lease amounts were collected from the Security Deposit Create bill to owner so HP receives money <input type="checkbox"/> If rent was paid with secdep: post mgmt fees & delete any over charge <input type="checkbox"/> Check the trust account balance & owner statement <input type="checkbox"/> Return file to property mgr assistant Date:
20.04.01 11/15/13

HomePoints - Outside Tasks

☐ ! @	Subject	Status	Due Date	% Complete	Categories	▲
☑	Review & Update form letters in AppFolio	Not Started	Wed 6/26/2013	0%		▲
☑	Clear unused prepayments/open charges	Not Started	Sun 12/1/2013	0%		▲
☑	Adjust ending date of AppFolio saved reports	Not Started	Wed 1/1/2014	0%		▲
☑	UD Reimb payments collected & broken lease fees	Not Started	Wed 1/1/2014	0%		▲
☑	Utility Billing Service for Properties	Not Started	Fri 1/3/2014	0%		▲
☑	Run Unpaid Mortgages/HOAs Reports (AC report)	Not Started	Mon 1/6/2014	0%		▲
☑	Post Late Fees	Not Started	Tue 1/7/2014	0%		▲
☑	Run Lease Expiration Detail Reports for Managers	Not Started	Tue 1/7/2014	0%		▲
☑	Post Late Fees	Not Started	Wed 1/8/2014	0%		▲
☑	Review Pending File	Not Started	Thu 1/9/2014	0%		▲
☑	Silver Bay - Unpaid bills	Not Started	Fri 1/10/2014	0%		▲
☑	Weekly Balance of Trust Accts	Not Started	Fri 1/10/2014	0%		▲
☑	Cleanup InProgress list in Appfolio	Not Started	Fri 1/10/2014	0%		▲
☑	Post Late Fees	Not Started	Fri 1/10/2014	0%		▲
☑	Review old unpaid bills	Not Started	Sun 1/12/2014	0%		▲
☑	Year end Cash Flow for closed properties	Not Started	Wed 1/15/2014	0%		▲
☑	Post Late Fees	Not Started	Wed 1/15/2014	0%		▲
☑	Move-in list for Maint Inspections	Not Started	Sat 1/18/2014	0%		▲
☑	Remind Mgrs for Rent Inc lists	Not Started	Sat 1/18/2014	0%		▲
☑	Allow online payments for one time NSF's	Not Started	Mon 1/20/2014	0%		▲
☑	Post Late Fees	Not Started	Mon 1/20/2014	0%		▲
☑	Rent Increase Letters to Residents	Not Started	Wed 1/22/2014	0%		▲
☑	Pay partials & notify managers of old unpaid bills	Not Started	Fri 1/24/2014	0%		▲
☑	Post Late Fees	Not Started	Sat 1/25/2014	0%		▲
☑	Delete PV payables	Not Started	Tue 1/28/2014	0%		▲
☑	Mgmt Fees & Late Fees	Not Started	Fri 1/31/2014	0%		▲
☑	Group 30 pay bills by last day of month (new info)	Not Started	Fri 1/31/2014	0%		▲
☑	Pay all LeaFee & Mgmt Fees	Not Started	Fri 1/31/2014	0%		▲
☑	Post late fees	Not Started	Fri 1/31/2014	0%		▲
☑	Print ck lists for Bill Pay Runs	Not Started	Sat 2/1/2014	0%		▲
☑	Tenant rent ACHs by 2nd	Not Started	Sun 2/2/2014	0%		▲
☑	Silver Bay Month End Reports	Not Started	Mon 2/3/2014	0%		▲
☑	Online rent payments - SPECIAL adjust for late fees/...	Not Started	Mon 2/3/2014	0%		▲
☑	Email Bob	Not Started	Mon 2/3/2014	0%		▲
☑	HOA Dues & Mortgage stmts	Not Started	Mon 2/3/2014	0%		▲
☑	Run Manager's list of Properties	Not Started	Mon 2/3/2014	0%		▲
☑	Accounting Dept Schedules for the month - Print tas...	Not Started	Tue 2/4/2014	0%		▲
☑	Post Late Fees 1st time for the month READ!!	Not Started	Tue 2/4/2014	0%		▲
☑	Post Late Fees	Not Started	Wed 2/5/2014	0%		▲
☑	Post Late fees	Not Started	Thu 2/6/2014	0%		▲
☑	Update Property Tax payables	Not Started	Mon 3/3/2014	0%		▲
☑	Property Tax Bill update	Not Started	Wed 10/15/2014	0%		▲

Home Rent

December

<i>Sun</i>	<i>Mon</i>	<i>Tue</i>	<i>Wed</i>	<i>Thu</i>	<i>Fri</i>	<i>Sat</i>
1	2 Print gp30-s Enter Rents Ann-Tenant ACH Rents	3 *Notify PMs gp-5 & 5x (AM) Print/Process gp-02x ACH Transfer	4 (AM) Global pay all bills.	5 (AM) Print/Process gp-5, 5x & 02x ACH Transfer *Notify PMs gp-8 & 10	6 *Notify PMs gp-6x & 7x.	7
8	9 (AM) Print/process gp-8 & 10	10 (AM) Print/Process gp-6x, 7x & 02x. ACH Transfer	11	12	13	14
15	16 Global pay all bills, Clean ups by request ACH Transfer	17 *Notify PMs gp-18, 19 & 20y.	18 *Notify PMs gp-17x, 17xx, 17xlmr, 20x & 20z.	19 (AM) Print/Process gp-18, 19 & 20y.	20 (AM) Print/Process gp-17x, 17xx, 17xlmr, 20x, 20z & 02x. ACH Transfer	21
22	23 Last day for PV invoices, Ram invoices ok	24	25 CLOSED HOLIDAY	26 Global pay all bills, Clean ups by request ACH Transfer	27 *Notify PMs gp-30x.	28
29	30 Create August Calendar	31 (AM) Process gp-30x. ACH Transfer				

2013

Property Manager Compensation Checklist

Property Manager: _____

Portfolio Number: _____

This report must be submitted fully completed no earlier than the last day of each month and before payroll is due. Reports submitted using dates outside these requirements will not be considered. If any of these days fall on a weekend, file PRIOR.

Date: _____

LETTERS IN BOXES ARE MANDATORY TO COMPLETE

- A** Base is 19% May be reduced if mandatory items not completed

B In writing, obtain responses (one owner & one tenant)

 - a. Ask these questions and get favorable answers:
 - b. How would you rate us: Poor, Not Good, Average, Good, Excellent
 - c. Let us know about your experience.

Provide 5 valid sales agent emails for quarterly survey to Bob
(must provide business card or email confirmation)

19%

Yes No 1%

- C** Vac: List All Vac including on hold & note how long/last rent change

To earn % must have none Vac over 90 days

Yes No 1%

	Address	Status	Days Vac	Last Rent Decrease
1	_____			
2	_____			
3	_____			
4	_____			
5	_____			
6	_____			
7	_____			
8	_____			
9	_____			
10	_____			
11	_____			
12	_____			
13	_____			
14	_____			
15	_____			
16	_____			
17	_____			
18	_____			
19	_____			
20	_____			
21	_____			
22	_____			
23	_____			
24	_____			
25	_____			

To earn "C" Appfolio must match NetRent Vacancy Sheet
 Attached Exterior Inspection Form for every property with 3 or more units.
 Form is in Manual 8.3.2
 Completed Estimate Sheet & voice mail sheet for each vacancy at desk & in Maint Dept?
 VERIFICATON BY SUPERVISOR _____ DATE _____

Property Manager Compensation Checklist

D	Attach Report/Aged Payable Summary/Portfolio#/>0.00/All Payees Total owed must be less than \$5,000.00 and each client owing over \$500 must have been contacted with Notes in the Appfolio Property File to verify.	Yes	No	1%
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E	Attach copy of Rent Increase Report At least 10 rents were increased with Owner approval. Lease renewals may be listed to qualify to reach the minimum required of 10 using checklist.	Yes	No	1%
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F	Each week a Weekly Transition Report must be saved in system and match AppFolio vacancy list Every tenant with a balance over \$200 must have satisfactory notes by the manager in the Tenant File Notes as to why they owe. The last Delinquency Report must be attached to this checklist along with last WTR and the Delinquency Report must have notes on anyone owing more than \$200 Distribute 50 Landlord Magazines and have tracking in company spreadsheet	Yes	No	1%
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G	Does Gross Portfolio Income exceed \$xx,xxx? & VM Matches Vac List? (will be verified by supervisor)	Yes	No	1%
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H	Does Gross Portfolio Income exceed \$xx,xxx.00? (will be verified by supervisor)	Yes	No	1%
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I	Hold a personal NARPM or CPM Designation or a chair level position in NARPM?	Yes	No	1%
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J	Total of 4 new accounts earned new account commission	Yes	No	1%
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K	Total of 6 new accounts earned new account commission	Yes	No	1%
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L	One original blog that Bob accepts for HomePointe Blog (500 word minimum)	Yes	No	1%
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M.	Negative reviews, calls not returned, anything negative the broker & General Manager agree are mishandled issues (each one will lower percentage by 1-10% based on Broker discretion.			
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- | | | | | |
|--|---|--|--|-----|
| | 1. On Friday are showings for vacancies posted for coming week? (Mon-Wed?) | | | -1% |
| | 2 | | | -1% |
| | 3 | | | -1% |
| | 4 | | | -1% |
| | 5 | | | -1% |
| | 6 | | | -1% |
| | 7 | | | -1% |
| | 8 | | | -1% |
| | 9 | | | -1% |
| | 10 | | | -1% |

Initial below that each of the following have been followed this month:		Total:	
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- ___ Monitor delinquencies and return Owner calls daily.
- ___ Checks ads, internet, recording, vac lists weekly for accuracy
- ___ See every vacancy at least once a week, show 2-3 times a week.
- ___ Evaluate rental rates every week, drop accounts that will not cooperate.
- ___ Do your own Estimate Sheets within 24 hrs of receiving keys.
- ___ Get Vacants in rent ready condition within 9 business days.

I certify that the above information is accurate and complete	Date		1.02.05 3/25/2013
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