



LIBERTY
MANAGEMENT INC, CRMC®

Kevin H. Knight | President & CEO -
ABR®, CRS®, GRI, RFS, RMP®,
MPM®, ePRO

Kevin@liberty.pm
www.libertymgt.net

Using
Outsourced Services
to become a consistently
Successful Property
Manager and to help your business
grow.



Outsourcing

- We manage about 800 properties in San Antonio and about 50 properties in Houston.
- In January and February we had all of our lease renewals completed before the end of month.
- Also on January 7nd along with our rent proceeds we sent out our owner 1099s and year end statements.
- We have property surveys (inspections) performed twice a year at the owners expense.
- For each work order we upload a copy of the invoice with before and after pictures.

- Per property we average 350 move-in pictures and 350 move-out pictures with video. (Move out pictures and video are performed by make ready personal)
- Owner's move out estimate has a link to the YouTube video.
- Our PMs almost never leave the office.
- We turn down about 50 to 75% of management leads that we receive.
- Our goal is to have 1000 properties that would be equal to having 1500 properties.

We outsource to multiple Virtual Assistant (VAs) and Vendors

Some of the benefits are:

More time for you and your staff

The single biggest and perhaps the most important benefit of working with a Virtual Assistant (VAs) is the amount of time you and your staff get.

When you let go of tasks such as ad postings, invoice processing and other administrative tasks, you will suddenly find a lot of precious time which you can use to obtain new clients, keep current clients and customers happy and increase your market share.

When VA experts work in your business and you work on your business, the results are truly compelling.

No Overheads

VAs work out of their office and this means you don't provide office space, computers, printers, phones, copiers, desks or chairs.

100% business continuity.

Rain or shine, your work gets done. VA are cross-train multiple employees on your projects, your work doesn't stop or slow down if one VA is sick or has taken time off. The backup VA jumps in and performs the work.

24-hour productivity

Your tasks get done while you are asleep.
VAs get it done before you enjoy your first cup of morning coffee.

When you work with VAs on a continuous basis, most ad postings, web updates, and invoice processing have an overnight turnaround time.

This makes us very fast and efficient!

VAs help you get organized

One of the first things you will notice is the gain in efficiency.

VAs streamline and document your work processes and help you get organized with your paperwork and must-do chores.

They manage your weekly, monthly and quarterly to-do lists like clockwork and get things done consistently and on schedule.

I'm barely going to scratch the surface of what VAs can do.

If it can be done with a computer VAs can do it.

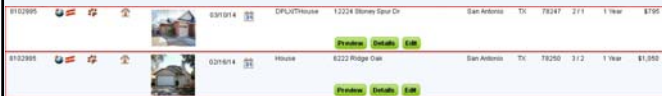
By this time next year we will have VAs doing 50% more tasks than they are currently doing for us.

- We are working on setting up:
Increased Owner and Tenant follow up systems.
Consistent Review Campaign for Google and other sites.

Advertising of Rentals

Market Properties: enter property info – resize and watermark photos, descriptions, directions, etc. in PM software.

VAs post to Rentals.com, Craigslist and AHARN.com for us. Makes us look better than just posting to the Multiple Listing Service (MLS)



Billing

Receive invoices, data entry, processing, follow-up on receivables, filing vendor invoices, uploading to software, etc.

Maintenance

We outsource our maintenance calls!

Receive work orders, determine what is needed, assign vendor, follow-up on work, quality assurance calls.

Virtual assistants help property managers stay on top of things and grow their property management business by performing key tasks on a daily, weekly, monthly and yearly basis:

From: Red Team - Virtual Assistant
Sent: Wednesday, February 12, 2014 6:05 AM
To: Valdez Irene
Subject: LM: Work Report - 02.12.14

Good Morning Irene:

Tasks done details for the day:
We have completed processing Work Order (28)

EI Faloon	24817	02/12/2014	0624	Maintenance & R...	02/12/2014	715.00	Unpaid
Whit's Commercial...	24563	02/12/2014	0497	Maintenance & R...	02/12/2014	1,036.10	Unpaid
EI Faloon	23698	02/11/2014	1404	Maintenance & R...	02/11/2014	70.00	Unpaid

VAs send out Surveys to our Owners and Tenants

SurveyMonkey®
Home My Surveys Survey Services

Send survey to Tenants to verify the completion and satisfaction of maintenance requests.

Maintenance Follow-up Survey
Customer Feedback

1. How did you submit your maintenance request?

Online Tenant Portal

2. How easy did you find it to place your service request?

Not Easy (1)	A Little Easy (2)	Rather Easy (3)	Very Easy (4)	Extremely Easy (5)
				X

Comments:

3. Did you receive an email or phone call from the office saying that they received your maintenance request?

Yes

4. How polite did you find our staff to be?

Not Polite (1)	A Little Polite (2)	Rather Polite (3)	Very Polite (4)	Extremely Polite (5)
				X

Comments:

5. Timeliness of response to maintenance request: How long before you were contacted by the maintenance company?

Less than 2 Days (1)	3 Days (2)	4 Days (3)	5 Days (4)	6 or More Days (5)
	X			

Comments:

6. How courteous and professional were the maintenance personnel?

Not (1)	A Little (2)	Rather (3)	Very (4)	Extremely (5)
				X

Comments:

7. How many visits by the maintenance personnel were required to complete your service request?

1 Visit

8. How clean did the maintenance personnel leave the work area?

Not Clean (1)	A Little Clean (2)	Rather Clean (3)	Very Clean (4)	Extremely Clean (5)
				X

Comments:

9. How Satisfied were you with the resolution of your service request?

Not Satisfied (1)	A Little Satisfied (2)	Rather Satisfied (3)	Very Satisfied (4)	Extremely Satisfied (5)
				X

10. How Satisfied were you with the time it took to complete your service request?

Not Satisfied (1)	A Little Satisfied (2)	Rather Satisfied (3)	Very Satisfied (4)	Extremely Satisfied (5)
				X

Comments:

11. Overall, On a scale of 1-5, how would you rate all aspects of your maintenance service? 1 being the experience was unsatisfactory and 5 being very positive, provided?

1 (1)	2 (2)	3 (3)	4 (4)	5 (5)
				X

Comments:

12. How likely are you to recommend Liberty Management to a friend?

Not Likely (1)	A Little Likely (2)	Rather Likely (3)	Very Likely (4)	Extremely Likely (5)
			X	

Tenants that respond positively to the maintenance surveys we ask for a review.



The image shows a promotional graphic for Liberty Management Inc. It features a blue background with a white house icon and the company name. Text includes 'Review us online! Share your experience', '2 Easy Options', 'SCAN & REVIEW', and a QR code. At the bottom, it says 'Liberty Management, Inc.' and 'Thank you for your business!'.

Tenant Screening

Receive applications, data entry, run reports, collect payments, collect all required information, analyze reports, give first approval.

Accounting

Owner draw preprocessing, statement preparation, reconciliations, month-end tasks, etc.

We process our owner funds and statements like clockwork thanks to our VAs.

New Owner Sign Up

The VA's take a new management agreement with all the information and enter them into our system.

The file is created, introductory emails are sent out.

Set up Management Fee details in your property management software.

New Owner Sign Up.

Enter Owners and upload New Management Agreements and other documents to our property management software.

Agents:				Virtual Assistant
Under Property Information in AppFolio enter the agents name.				
Management Checklist Form to be filed under Property in AppFolio	<input checked="" type="checkbox"/> Completed			Virtual Assistant
Owner's Information Sheet filed under Owner's name in AppFolio	<input checked="" type="checkbox"/> Completed			Virtual Assistant
W-9 Form to be filed under the Owner's name in AppFolio	<input checked="" type="checkbox"/> Completed			Virtual Assistant
KCH Form to be filed under the Owner's Name in AppFolio	<input checked="" type="checkbox"/> Completed			Virtual Assistant
Acknowledgement Sheet to be filed under Owner's Name in AppFolio	<input checked="" type="checkbox"/> Completed			Virtual Assistant
BS Sheet to be filed under the Owner's Name in AppFolio	<input checked="" type="checkbox"/> Completed			Virtual Assistant
Management Agreement Contract to be filed under the Property in AppFolio	<input checked="" type="checkbox"/> Completed			Virtual Assistant
Property Information Sheet to be filed under the Property in AppFolio	<input checked="" type="checkbox"/> Completed			Virtual Assistant
MOA Form to be filed under the Property in AppFolio	<input checked="" type="checkbox"/> Completed			Virtual Assistant
MLS Sheet it is to be filed under the Property in AppFolio	<input checked="" type="checkbox"/> Completed			Virtual Assistant
Tax Rolls to be filed under the Property in AppFolio	<input checked="" type="checkbox"/> Completed			Virtual Assistant
Property Insurance Form to be filed under the Property in AppFolio	<input checked="" type="checkbox"/> Completed			Virtual Assistant
Owner's Notice Concerning Condition of Property to				Virtual Assistant

New Management
VAs send welcome letter to owner.

Lead Paint Addendum to be filed under the Property in AppFolio	<input checked="" type="checkbox"/> Completed			Virtual Assistant
Send a Copy of the HOA form to the HOA	<input checked="" type="checkbox"/> Completed			Virtual Assistant
0 - 1 D: Notice to Home Owner's Association Up-date Contact Information	<input type="checkbox"/> N/A			
Send Owner Welcome Letter: 0 - 1 A: Thank you for choosing Liberty Management, Inc.				Virtual Assistant
Post the year built in AppFolio under Year Built field	<input checked="" type="checkbox"/> Completed			Virtual Assistant
Post all information in AppFolio Software				Virtual Assistant
Create folder for pictures Real Estate Pics on xserver				Virtual Assistant
Create folder for docs under Real Estate Documents on xserver				Virtual Assistant
Comments:				

New Management (cont.)
VAs Send Introduction letter to Existing Tenants that come with a New Management.

Step Three - if Property came with a tenant.	DATE:	INITIAL	TITLE
Input tenant's lease agreement and contact info	<input checked="" type="checkbox"/> Completed <input type="checkbox"/> N/A		Virtual Assistant
Sent tenants: T - 0 A: Introduction to Existing Tenant with New Mgmt.	<input checked="" type="checkbox"/> Completed <input type="checkbox"/> N/A		Virtual Assistant
If Property came with tenants order survey on property. Sent Survey request to faustino@libertymgmt.net	<input checked="" type="checkbox"/> Completed <input type="checkbox"/> N/A		Virtual Assistant
Check survey if repairs or security devices need done	<input checked="" type="checkbox"/> Completed <input type="checkbox"/> N/A		Sales Manager
If the property came with a tenant: let Mary know that we need to Pay the Agent a Management Commission for brining in Management	<input checked="" type="checkbox"/> Completed <input type="checkbox"/> N/A		Sales Manager
Comments:			

Lease Expirations

Collect Information	DATE:	INITIAL	TITLE
Is the Property in Leon Valley?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A		Virtual Assistant
Do Tenants have an outstanding balance?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A		VA
Tenant's Current Monthly Rent			
Comments:			
90 Day Lease Expirations Step One	DATE:	INITIAL	TITLE
Need New Management Agreement	Select...		Debbie
Send Owner new management agreement	<input type="checkbox"/> Yes <input type="checkbox"/> N/A		Debbie
Is the Property in Leon Valley?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A		
If Property is in Leon Valley check if we need to renew the Rental Agreement	<input checked="" type="checkbox"/> Completed <input type="checkbox"/> N/A		Debbie
Tenant's Current Monthly Rent			
Proposed Rent for tenants to renew their lease agreement			Debbie
New Rent if tenants move and we put the property back on the market			Debbie
Send Owner 90 Day Letter Letter (1 - 1 A) - 90 Day Lease Exp. No Increase Letter (1 - 1 B) 90 Day Lease Exp. with Increase	<input checked="" type="checkbox"/> Completed		Virtual Assistant
Do Tenants have an outstanding balance?	<input type="checkbox"/> Yes <input type="checkbox"/> No		Faustino
Check to see if 90 day survey is on file	<input type="checkbox"/> Yes <input type="checkbox"/> No		Faustino
Is the 90 day survey placed properly on the Subaru List	<input type="checkbox"/> Done <input type="checkbox"/> N/A		Faustino
Review last survey - is survey good?	<input type="checkbox"/> Yes <input type="checkbox"/> No		Faustino
If last survey is good send Renewal Notice to Tenant If last survey is bad do not send Renewal Notice and bring to owner's attention	<input type="checkbox"/> Good <input type="checkbox"/> Bad		Faustino
Send Renewal Notice To Tenant Letter (1 - 1 A) - Administrative Notice to Tenant, One Increases Letter (1 - 1 B) - Renewal Notice To Tenant with Rent Increase	<input type="checkbox"/> emailed <input type="checkbox"/> N/A <input type="checkbox"/> mailed		Virtual Assistant
Comments:			

Tenant Renewal Tracking

The VA's run 90 day reports for us on upcoming lease expirations.

They send letter to owner advising them that we are working on renewing the tenants lease agreement and if we are raising the rent or not.

They send out Lease renewal letter to tenants via DocuSign (e-forms) to tenants to get their signed intent on what they are wanting to renew or vacate.

Outsourcing

From: Red Team – Virtual Assistant
Sent: Saturday, February 15, 2014 1:22 AM
To: Hollis Brian
Subject: LM: Work Report - 02.15.2014

Good Morning Brian,
 Task done details for the day:
We have completed processing 90 days lease expiration letter to the tenant for the following (42) properties:

1. Alverstone Way 7422 – **Tenant has no e-mail id. Letter saved in Dropbox.**
2. Ancient Song 3716
3. Babcock Rd 1 6467
4. Bartlett Falls 9339
5. Battle Oak 19638
6. Bear Springs 2610
7. Bobcat Creek 627
8. Boxer Bay 14407
9. Cape Meadow 6803
10. Cardinal Song 235

Lease Violations					
Resolution					
Scheduled for follow up:	<input type="checkbox"/> Yes <input type="checkbox"/> N/A	Use the Follow Up Date Above to Suspend the follow up.			Tino
Tenants Confirmation that they took care of the violation.	<input type="checkbox"/> Yes <input type="checkbox"/> No				Tino
Scan Notice form tenant that they took care of the violation.	<input type="checkbox"/> Completed				Tino
If we have not received confirmation from tenants send 2nd Violation Notice?	<input type="checkbox"/> Yes <input type="checkbox"/> N/A	Use This Form: T - 4 K: 2nd Notice Lease Violation Up date the Follow Up Date Above to match Follow Up Date in 2nd Notice			Virtual Assistant
Tenants Confirmation that they took care of the violation.	<input type="checkbox"/> Yes <input type="checkbox"/> No				Tino
Scan Notice form tenant that they took care of the violation	<input type="checkbox"/> Completed				Tino

Process Late Fees in your property management software. Email "Demand Letters" to tenants and have letters ready to print.					
Step 1 - Late Fees & 1st Notice	Option	Date	Initials	Title	
Tenant has grace period AFTER 3rd at 11:59pm	<input type="checkbox"/> Yes <input type="checkbox"/> No				Virtual Assistant
If Yes, what is the grace period? Change follow up date to date after grace period expires	<input type="checkbox"/> Completed				Virtual Assistant
If No, charge initial late fee (See Lease Agreement)	<input type="checkbox"/> Completed				Virtual Assistant
Create, email, and save tenant letter: T - 3 B: 1st - Notice - Rent Payment Not Received	<input type="checkbox"/> Completed				Virtual Assistant
Comments:					

NTQ Evictions
VAs notify the owner when the tenants have not paid rent.

Step 3 - NTQ	Option	Date	Initials	Title
Create Late notice to tenants: 1. T - 3 R: 1st - Notice - Rent Payment Not Received 2. T - 3 C: 2nd - 3 Day Notice Terminating Right of Occupancy 3. T - 3 D: 3rd - 3 Day Notice with Balances Only 4. New NTQ Serious Notice	<input checked="" type="checkbox"/> Completed <input checked="" type="checkbox"/> Completed <input checked="" type="checkbox"/> Completed <input checked="" type="checkbox"/> Completed			Virtual Assistant
Create Notice to Quit certified mail to tenant: 1. T - 3 C: 2nd - 3 Day Notice Terminating Right of Occupancy	<input checked="" type="checkbox"/> Yes			Virtual Assistant
Date NTQ expires:				Virtual Assistant
E-Mail notice to Owners that tenants have not paid rent: 1. O - J0 A: Tenant has NOT PAID	<input checked="" type="checkbox"/> Completed			Virtual Assistant
Charge tenant NTQ Fee (\$75)	<input checked="" type="checkbox"/> Completed			
Comments:				

Transfer Management Out

If owner owes money post on Outstanding Owner Balances and close this form!
 If owner does not owe money finish filling out form.

All bills paid- Owner owes no money to Liberty.	<input checked="" type="checkbox"/> Completed			Property Supervisor
Mark and move folder to inactive:	<input checked="" type="checkbox"/> Completed			Secretary
Put property inactive in management software:	<input checked="" type="checkbox"/> Completed			Virtual Assistant
Mark owner inactive if this was their only property; Double check owners statement that the owner has been zeroed out and does not owe money and we are not holding money in the owner's account.	<input checked="" type="checkbox"/> Completed <input type="checkbox"/> N/A			Virtual Assistant
Move Picture file under Real Estate Pictures to zzz-Closed Properties	<input checked="" type="checkbox"/> Completed			Virtual Assistant

SARMA - Collections
If tenants leave owing money after sending warning letters VAs turn the tenants over to collections.

Step 2: Submit for Collection	Action	Date	Initial	Title
Submit to SARMA for collection: SARMA Collections	<input type="checkbox"/> Yes <input type="checkbox"/> No			Virtual Assistant
If required information cannot be located in Appfolio: Reassign to Property Supervisor for correction	<input type="checkbox"/> Yes <input type="checkbox"/> No			Virtual Assistant
Comments:				

Receive daily emails about completed tasks.

From: Red Team - Virtual Assistant
Sent: Monday, February 17, 2014 5:44 AM
To: Brian@libertymgt.net
Subject: LM: Work Report - 02.17.14

Good Morning Brian,
Task done details for the day.
We have added Property details and Owner details into Appfolio for the following property.
• 6222 Ridge Oak
We have completed posting following properties on AHRN website.
•Stoney Spur Dr 12224
•Ridge Oak 6222

VA's will attach screenshot of completed work.

Thanks & regards,
Red Team
Virtual Assistant

Completed processing Work Order for Utility Bill (11)

City Public Service	300...	02/12/2014	1320	Utilities	02/12/2014	8.75	Unpaid
San Antonio Water...	000...	02/12/2014	0887	Utilities	02/12/2014	60.00	Unpaid

Enter Rent Payments and Owner payments received via Paylease.

We have completed working on Pay lease (Batch #824)

Bank Name	CHASE BANK	Deposit Number	824
Account Name	LibertyOwnersEscrow-0m	Deposit Date	02/11/2014
Account Number	[REDACTED]	Number of Items	1
Description	Paylease		

Check #	Date	Property	From	Description	Amount
[REDACTED]	02/11/2014	1567	[REDACTED]	--	1,150.00
					Total: 1,150.00

Create Lease Agreements, move-in-inspections, pet addendums, for lease signing and send agreements via DocuSign to tenants.

Enter Tenants and upload lease agreements and other documents to your property management software.

Enter Security Deposit, first month's rent, and process leasing fee after the tenant information is entered in your property management software.

Run Lease Expiration report every month.

Process Tenant Move-outs, return security deposits, and create checklist for making the property rent-ready.

Outsourcing

Generate Owner Statements and Owner Draws.

Generate year-end owner statements and upload 1099 to their (owner) portals.

Perform monthly Bank Reconciliation.

Reduce overall paperwork, and upload data for backup and archiving on online/cloud storage services.

Other Outsourcing Capabilities that some VAs can do

Misc. Tasks

Voicemail Management (transcribing and distributing various voicemail lines), Website chat support, file organization, misc. data entry (new properties, tenants, leases, etc), data archiving, etc.

Customer Service

Responding to questions and concerns (using canned responses), website chat support, etc.

Marketing (for new business)

Run campaigns, monitor performance, create reports, posting ads, receiving leads and data entry (if not automated), pay per click management, SEO, website development, etc.

Social Media Management

Posting through various social sites, monitoring accounts for positive/negative reviews, boosting reviews from surveys, creating social webs and links, Upload Property Videos to your YouTube account and your property management website.

