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Phone 303.255.1990  
[www.PropertyManagementSystem.org](http://www.PropertyManagementSystem.org)

## Prospective Owner Questionnaire

Date: \_\_\_\_\_

Property Address: \_\_\_\_\_

Type of Property: \_\_\_\_\_

Owners Name: \_\_\_\_\_

Phone #: \_\_\_\_\_

E-mail: \_\_\_\_\_ Send e-mail to Marc for CC entry: \_\_\_\_\_

1. Tell me a little bit about yourself and your situation? (ask questions to develop rapport)
2. If we work together, we want to be sure that we are working with YOUR goals in mind. So what are your short and long term goals or plans for yourself?
  - \* Are they looking to rent for one-year then sell, will they be moving back to the property in 2 years, do they want to buy more RE??
  - \* After you determine their goals, explain how we can help them achieve this goal.

3. Is the property currently occupied? \_\_\_\_\_, if yes, by whom?

\_\_\_\_\_

If tenant occupied, what is the current rent? \_\_\_\_\_

If tenant occupied, is the tenant a "good" tenant or are there problems? \_\_\_\_\_

If owner occupied, what rental rate are you hoping to receive? \_\_\_\_\_

**\*\* If GM will be taking over a property with a tenant already in place – GM charges a \$250 setup fee. Can be increase or reduced by the PM.**

3. When will the property be vacant? \_\_\_\_\_

4. How long have you owned the property? \_\_\_\_\_ Are you current on your mortg? \_\_\_\_\_

5. Does the property need work to bring it to a rent-ready condition? \_\_\_\_\_  
If yes, what?

\_\_\_\_\_

6. Have you worked with a property management company before?

7. We want to be sure that we understand your goals for the property so we ensure we manage the property in such a way to help you reach these goals. What goal(s) are you wanting to reach with the property? (ie – maximize cash flow, find the highest quality tenant, moving back into the property in the future, acquiring more rental property.... Etc..)

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8. What is the most important thing you are looking to get from professional property management?

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9. Are you also considering selling your property? \_\_\_\_\_  
(If yes) Would you like us to prepare a free sales analysis for the property in addition to preparing you a rental rate quote? \_\_\_\_\_

10. Where did you hear about Grace Management? \_\_\_\_\_

11. Have you reviewed our web-site to get information on our how we can help you? \_\_\_\_\_

Comments: \_\_\_\_\_

For the PM: In your estimation, is the owner: (enter yes or no)  
Financially stable: \_\_\_\_\_ Emotionally stable: \_\_\_\_\_ Realistic: \_\_\_\_\_  
Can you control this transaction AND this owner? \_\_\_\_\_  
'Yes' must be entered in all of the above to work with the owner.

Next Action Step: \_\_\_\_\_

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