



REAL ESTATE CHECK-UP

PROPERTY MANAGEMENT SERVICES

Add to your investment—subtract from your stress!

INTRODUCTION

The Property Management Services “Real Estate Check-Up” provides a review of the current systems, procedures, and reporting that is currently being implemented at the property. The comprehensive review includes:

- Review of existing accounting reports critical for owner “eyes on” information for cash flow, financial performance, rent collections, and deferred maintenance.
- Level One Property Inspection by trained professionals to identify any issues that may need attention.
- Review of property operation systems and procedures, life safety, building manuals, security procedures, and risk management.
- Long term Asset Management plans and actions.
- General strategy meeting discussing owner’s general objectives of the asset, custom strategies, and recommendations.

ACCOUNTING REPORTS REVIEW

- Cash Flow, Accounts Receivable/Payable, Profit and Loss reports
- CAM, Taxes, & Utility Reconciliation and Tenant Bill Backs
- Financial Forecasting and Budgeting
- Capital Improvement Plan and Reserves
- Rent Rolls, Delinquent Revenue Reports
- Tenant CAM, Taxes, and Utility Bill Backs
- Year End Audit Assistance



LEVEL ONE PROPERTY INSPECTION

- Roof and Mechanical Systems
- Exterior Building and Paved Areas
- Exterior Esthetics and Landscaping
- Windows and Doors
- General Interior





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PROPERTY OPERATIONS

- Work Order / PM System Review
- Competent & Cost Effective Vendors
- Property Inspections / Frequency / Follow Up
- COI Tracking—Current and Accurate
- Life Safety Inspections
- Security Systems & Procedures
- Operation Manuals / Building “As Built” Drawings
- Tenant Manuals / Relations
- Tenant Lease Expiration Tickler Calendar
- Tenant COI—Current and Accurate
- Tenant Experience Enhancements



ASSET MANAGEMENT

- Long Term Asset Plan
- Strategy for Maximizing Asset Valuation
- Tax Grievance Considerations
- Capital Improvement Forecasting with Budgets and Reserves
- Market Rent Reports

CONCLUSIONS MEETING

- Property Inspection Report
- Accounting Reports Findings
- Property Operations Findings
- Asset Management Findings
- General Discussions and Recommendations

