



OWNER WELCOME PACKET

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THE BROKERAGE
PROPERTY MANAGEMENT

TB The Brokerage Property Management

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Thank you for
trusting me with
your biggest
investment!

WELCOME!

I grew up as a San Diego native and have loved this beautiful city. My wife and I have chosen to raise our three children here, in the small community of Ramona, where my wife is a 4th generation "Ramonan". Here we have raised our three children Mikaela, Blake and Farrah. After finishing school at San Diego State University, emphasis in Marketing, I purchased my own health club in 2001. I have been in business in Ramona for over 20 years as owner and operator of one of the counties most successful health clubs and training facilities, The Gym Ramona. Before purchasing The Gym I worked as Associate Producer for American Sports Network, a division of ESPN. I love business and how ALL good business practices are transferrable. The combination of my experience and education in marketing, advertising, cinema production and photo, as well as sales and service, have led me to a career in real estate. I look forward to the opportunity to serve my clients with the upmost care and diligence in selling or buying property. As a full service real estate professional, I work with buyers, sellers and investors in real estate transactions spanning all of price ranges and property types throughout San Diego County and more.

Peter San Nicolas
BROKER

MEET THE TEAM!



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New Account

OWNER INTAKE FORM

PROPERTY ADDRESS _____

OWNER NAME _____

OWNER ADDRESS _____

PHONE _____

PROPERTY INFORMATION

MINIMUM ACCEPTABLE MONTHLY RENT RATE: _____

MINIMUM ACCEPTABLE LEASE TERM: _____

WILL YOU ACCEPT PETS? YES ☐ NO ☐ IF YES, WHICH TYPE? _____

DOES YOUR PROPERTY HAVE AC OR OTHER COOLING SYSTEM? YES ☐ NO ☐ IF YES, WHICH TYPE? _____

DOES YOUR PROPERTY HAVE AN IRRIGATION SYSTEM? YES ☐ NO ☐

IF YES, WOULD YOU LIKE US TO HANDLE THE IRRIGATION TURN OFF AND ON EACH SEASON? YES ☐ NO ☐

DOES YOUR PROPERTY HAVE A MAILBOX IN FRONT OF HOUSE OR A CLUSTER BOX THAT REQUIRES A KEY?

IF THE MAILBOX IS LOCATED AT A CLUSTER BOX, PLEASE PROVIDE THE MAILBOX LOCATION AND #

IS YOUR PROPERTY LOCATED IN A GATED COMMUNITY? YES ☐ NO ☐ IF YES, WHAT IS GATE CODE?

OWNER PAID UTILITIES: SEWER ☐ GARBAGE ☐ WATER ☐ ELECTRICITY ☐ GAS ☐
LANDSCAPING ☐ HOA DUES ☐ OTHER ☐ IF YES, WHICH TYPE?

IF YOUR PROPERTY IS AN APARTMENT, CONDO OR TOWNHOUSE, PLEASE PROVIDE PARKING SPACE NUMBER: _____

DO YOU HAVE A HOME WARRANTY? YES ☐ NO ☐

IF YES, PLEASE PROVIDE ME WITH A COPY OF THE POLICY SHOWING THE COMPANY, POLICY # AND CONTACT INFORMATION. I WILL NEED THIS FOR MY FILE.

IF THERE ARE ANY SPECIAL INSTRUCTIONS OR ADDITIONAL THINGS WE NEED TO KNOW ABOUT YOUR PROPERTY, PLEASE PROVIDE DETAILS ON THE NEXT PAGE.

OWNER SIGNATURE _____

OWNER SIGNATURE _____

PROPERTY NOTES & ADDITIONAL INFORMATION

OWNER SIGNATURE _____OWNER SIGNATURE _____

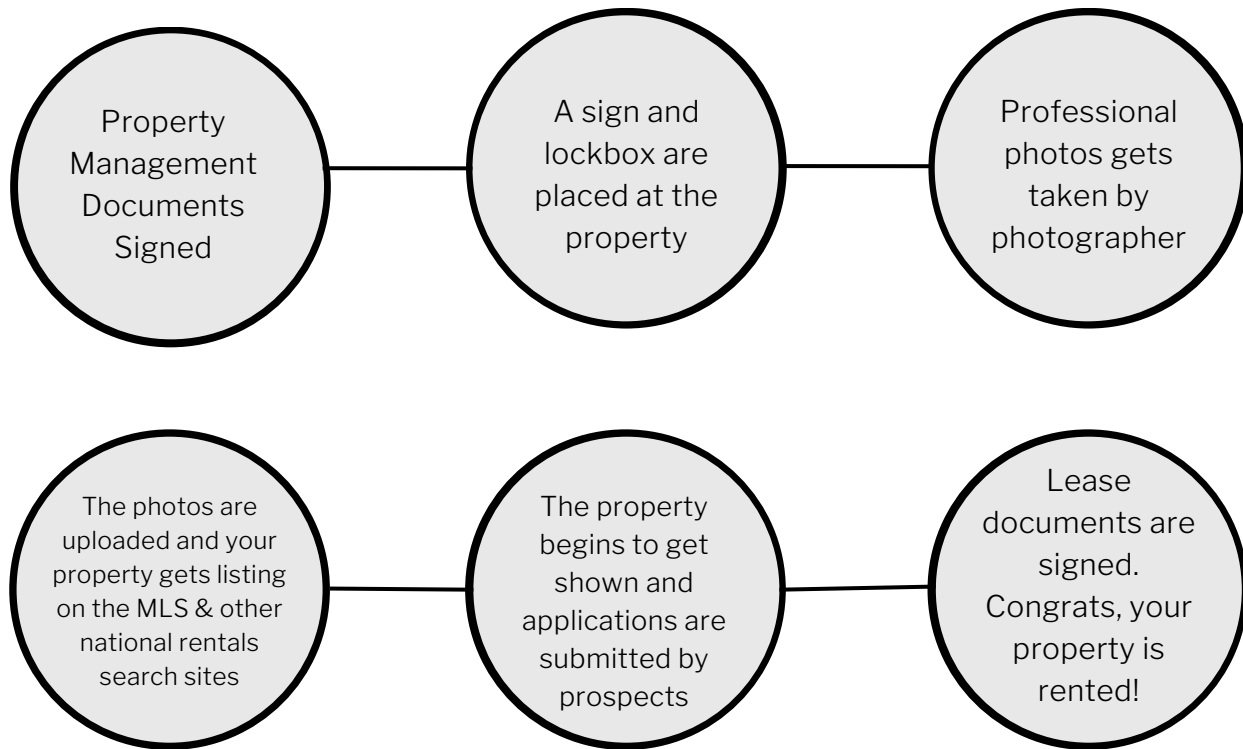


SIMPLE WAYS TO GET YOUR HOUSE READY FOR TENANTS

Now that you are getting ready to list your property for rent, it's important that you go through the list below to ensure your property is ready for new tenants.

- Make sure all appliances are in working order and up to safety standards.
- Make sure all windows and doors are secure, and that locks are in place.
- Ensure that any smoke and carbon monoxide detectors are installed, and that they are regularly tested.
- Repair and paint any walls or ceilings that are damaged or scuffed.
- Clean and sanitize all surfaces, including floors, appliances, and bathrooms.
- Replace any worn-out carpeting or flooring.
- Update any outdated fixtures or lighting.
- Ensure that all plumbing is in good working order.
- Check for any pest infestations, and treat if necessary.
- Make sure that all outdoor areas are clear of debris and hazards.
- Replace any/all furnace intake filters and leave a couple extras for tenants.

THE PROCESS



NEXT STEPS

01

Once the lease is signed and you know the move-in date of the new tenants, call the utility companies to have services disconnected in your name effective on that date. The new tenants will call to have services put in their names.

02

Once the tenants officially move in, I will keep you informed of any maintenance issues or requests from the tenants.

03

That is it for now. Each month, you will receive your owner payment along with copies of any invoices paid that rent cycle.

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

PROPERTY MANAGEMENT FAQ'S

Q: What services are included in management fee?

A: I offer several different management services ranging from Full Service to Tenant Finder Only and even Short Term Vacation Rentals.

Q: How often do you inspect the property?

A: I do a periodic walkthrough every 6 months and then again during the Final Walkthrough once a tenant has vacated.

Q: How do you handle Tenant requests and/or complaints?

A: Each tenant will have their own Tenant Portal where they can pay rent, submit maintenance requests and submit any notes including complaints that need to be resolved.

Q: What experience do you have managing properties like mine?

A: I have been a Licensed Realtor and Property Manager since 2011 and have managed many different types of properties from multi-unit to apartments to Single Family Residences.

Q: What is your policy for late rent payments?

A: Rent is due on the 1st of the month and is considered late on the 4th. The late fee penalty for paying late is outlined in the Terms and Conditions of the Lease Agreement.

Q: Are there any additional fees or charges not included in your management fee that i should be aware of?

A: There are no additional fees. Professional photos, sign and lockbox are all included in my monthly management fee. My policy is to not charge anything until a lease has been signed and the property is rented. You will not be charged during any of the vacancy periods.

Q: What is your process for finding and qualifying tenants?

A: The application process is very thorough in vetting a qualified tenant. It runs a background, credit, income, rental verification/history and eviction check on each applicant.

Q: What bills are tenants typically responsible for?

A: Tenants are normally responsible for water, electricity, gas and/or propane, garbage and any cable, internet services of their choice. What the tenant pays for is usually negotiable depending on lease terms.

Q: What bills are owners typically responsible for?

A: Owners are normally responsible to pay for HOA dues, mortgages, property taxes and sewer. Owners sometimes offer to pay for landscaping services as well. What the owner and tenant pay for is usually always negotiable. Owners can also choose to have the management company pay any of these bills on your behalf by having these bills sent directly to our office to be paid through the property from the monthly rent proceeds.

Q: Is it worth the money to pay for a Home Warranty?

A: This is always personal preference. The Home Warranty will cover all of the main systems within the property including plumbing, electrical & HVAC. Most Home Warranty companies also offer options to cover all appliances within the home like refrigerator, washer and dryer. Service call fee amounts differ from each company, so its always a good idea to compare companies.

Q: How is my owner payment handled every month?

A: Once the tenant pays rent, it is then processed by the accounting department. Once the payment clears the bank, your owner payment will be paid to you by the 10th of each month. You will also get an email to notify you of the ACH deposit. You will also receive a monthly accounting statement for your records.

Q: What is your showing process?

A: Once the property is listed for rent and inquiries start coming in, a showing appointment will be scheduled. The property will be shown by myself, someone from my team or by another licensed agent from my office. We never allow any prospects to view the property without being accompanied by a licensed team member.

Q: What is the term of the property management agreement?

A: The initial term is always for one year. After the year, either part has the option to provide the other with a 30 day written notice OR renew the term for an additional year. The term as well as any of the other conditions in the property management agreement is always negotiable.

FAQ'S

THANK YOU!



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Real Estate Agency

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