

Boswell Real Estate

4310 Cumberland Road
Fayetteville, NC 28306

PROPERTY MANAGEMENT CHECKLIST

Street Address: _____
Zip Code: _____
Subdivision: _____
Homeowner's Association Name: _____
Address of HOA: _____
HOA Managed by: _____
Amount of Monthly Dues: _____

Bedrooms: _____ Bathrooms: _____ Sq Ft: _____ Garage Y/N
Fireplace Y/N Gas Heating Y/N (Natural/Propane Tank)

Companies:

Electric: _____
Water: _____
Sewer: _____
Gas: _____
Trash: _____
Exterminator (if under annual contract): _____
Termite (if under annual contract): _____
Alarm: _____ Code: _____
Insurance/ Home Warranty: _____

Pets Allowed: _____
Appliances in Property: _____
Year Built: _____ Square Footage: _____
Rental Amount: _____ Section 8 Allowed: _____

Name: _____ SSN: _____
Home Phone: _____ Cell Phone: _____
Work Phone: _____ (Home/Work/Cell to Contact First)
Email Address: _____
Proceeds Sent to: _____

Emergency Contact Info: _____
Relationship: _____

Attention Property Manager: Please pull tax records for this property and place in file.

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Expense Information

Expenses Near Moveout or Initial

This is to notify you of the main areas that expenses may occur in the first few months that your property is converted to a rental home or transferred to this company. This list may not completely apply or is not inclusive. Other areas may arise for your particular home that is not known at this time.

1. Advertising in the newspaper, internet and etc.
2. Interior cleaning prior to new tenants
3. Interior walls-spackling and painting
4. Lawn and shrub maintenance
5. Carpet cleaning
6. Owner's trash removal- some companies do not haul moving trash
7. Required general maintenance
8. Pest treatment in the first 30 days of lease
9. Fire extinguisher
10. All locks will be re-keyed to a single key system.
11. Carbon monoxide and carbon dioxide alarm installed on required homes.
12. 10% supervision fee on all projects that require bids, estimates and supervision.

Expenses With Tenants

It is the policy of our firm to perform annual maintenance/service/inspections on AC/Heating Systems, Termite Inspections (except where it does not apply) and any other areas that we feel is in line with maintaining your investment. If you currently have a termite contract please inform us. If your home has an attached garage, fireplace, or uses any fossil fuel you must have a carbon monoxide detector. That is a state law for rental homes. Some maintenance will be performed by American Rentals Maintenance which is an affiliate company.

Nonemergency maintenance needed that is less than \$300.00 in repair may be done without notification. Routine repairs over \$300.00 will be notified and coordinated. Keep in mind some items such as heating and air and hot water heater replacement will exceed \$300.00. When health, welfare or safety items are mandated by law or ordinance we have to make those repairs to comply.

Emergency maintenance will be repaired as soon as we are aware of them. Repair price notification will be sent to you when the contractor of the needed repairs notifies me. Emergency examples are ones that effect the health or welfare of tenants such as no water, electric, sewer, heating or air conditioning and similar situations.

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Signature & Date

Request for Taxpayer Identification Number and Certification

**Give Form to the
 requester. Do not
 send to the IRS.**

Print or type
 See Specific Instructions on page 2.

Name (as shown on your income tax return)	
Business name/disregarded entity name, if different from above	
Check appropriate box for federal tax classification: <input type="checkbox"/> Individual/sole proprietor <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=partnership) ▶ _____ <input type="checkbox"/> Other (see instructions) ▶ _____	
<input type="checkbox"/> Exempt payee	
Address (number, street, and apt. or suite no.)	Requester's name and address (optional)
City, state, and ZIP code	Boxwell Real Estate 4310 Cumberland Rd. Fayetteville, NC 28306
List account number(s) here (optional)	

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on the "Name" line to avoid backup withholding. For individuals, this is your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

Social security number									

Note. If the account is in more than one name, see the chart on page 4 for guidelines on whose number to enter.

Employer identification number									

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and
3. I am a U.S. citizen or other U.S. person (defined below).

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions on page 4.

Sign Here	Signature of U.S. person ▶	Date ▶
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General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Purpose of Form

A person who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) to report, for example, income paid to you, real estate transactions, mortgage interest you paid, acquisition or abandonment of secured property, cancellation of debt, or contributions you made to an IRA.

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN to the person requesting it (the requester) and, when applicable, to:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
2. Certify that you are not subject to backup withholding, or
3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income.

Note. If a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

Definition of a U.S. person. For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien,
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States,
- An estate (other than a foreign estate), or
- A domestic trust (as defined in Regulations section 301.7701-7).

Special rules for partnerships. Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax on any foreign partners' share of income from such business. Further, in certain cases where a Form W-9 has not been received, a partnership is required to presume that a partner is a foreign person, and pay the withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid withholding on your share of partnership income.

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Homeowner Information Sheet

The following information is needed in order to process rent proceeds as quickly as possible. Please make sure to fill out every thing completely.

Property Address

Homeowner Name

Mailing Address

Phone Number

Email Address

Social Security Number

Bank Account Information (for direct deposit)

Homeowners Association (Amount of dues and address to send payment)

Please be looking for an email from Dawn Shoemaker within the next few days, this email contains information to set up your online portal where you will view all financial information through out the month. Activity is uploaded every Friday, statements are uploaded on the last day of the month, and all invoices are uploaded on the first day of the month. Please visit www.promascentral.com click on owners and then create an account, this is where you will need the email. If you have any questions or problems please feel free to call our office.

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The benefits of ownership and renting

LANDLORD OWNERSHIP

- Loan interest deduction
- Real estate tax deduction
- Real estate insurance deduction
- Depreciation of home deduction
- Maintenance expense deduction
- Management fee deduction
- Homeowners association dues deduction
- Equity buildup from loan reduction each payment
- General appreciation of value each year
- Satisfaction that the tenants are paying for your financial future

OCCUPANT OWNERSHIP

- Loan interest deduction
- Real estate tax deduction
- Equity buildup from loan reduction each payment
- General appreciation of value each year
- Satisfaction of ownership

RENTING

- None of the above

A tax advisor should be consulted to the exact details and deductions.