

# LIFETIME PROPERTY MANAGEMENT

www.lifetimepm.com | (916) 756-5384

## Landlord Document Organizer

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### PROPERTY PURCHASE & OWNERSHIP

- ☐ Deed and title documents
- ☐ Purchase agreement and closing documents
- ☐ Property survey
- ☐ Title insurance policy
- ☐ HOA documents and CC&Rs
- ☐ Property tax records
- ☐ Mortgage documents

### INSURANCE DOCUMENTS

- ☐ Landlord/property insurance policy
- ☐ Umbrella liability policy
- ☐ Flood insurance (if applicable)
- ☐ Earthquake insurance (if applicable)
- ☐ Insurance claim history
- ☐ Agent contact information

### TENANT DOCUMENTATION

- ☐ Rental applications (all applicants)
- ☐ Screening reports (credit, background)
- ☐ Signed lease agreements
- ☐ All addenda and disclosures
- ☐ Move-in inspection reports and photos
- ☐ Move-out inspection reports and photos
- ☐ Security deposit records
- ☐ Rent payment history
- ☐ Correspondence with tenants
- ☐ Lease violation notices
- ☐ Eviction documents (if any)

## FINANCIAL RECORDS

- ☐ Rental income records
- ☐ Operating expense receipts
- ☐ Mortgage payment records
- ☐ Property tax payment records
- ☐ Insurance payment records
- ☐ Utility bills (landlord-paid)
- ☐ HOA fee payments
- ☐ Contractor and vendor invoices
- ☐ Annual profit/loss statements
- ☐ Tax returns (property-related)

## MAINTENANCE & REPAIRS

- ☐ Major repair receipts and documentation
- ☐ Contractor contact information
- ☐ Warranty documents for appliances/systems
- ☐ HVAC service records
- ☐ Pest control service records
- ☐ Roof inspection/repair records
- ☐ Plumbing service records
- ☐ Electrical work permits and records

## PROPERTY IMPROVEMENTS

- ☐ Renovation permits and approvals
- ☐ Contractor agreements
- ☐ Before and after photos
- ☐ Improvement cost documentation
- ☐ Updated property valuations
- ☐ Capital improvement depreciation schedules

## LEGAL & COMPLIANCE

- ☐ Business license (if required)
- ☐ Rental registration (if required)
- ☐ Lead paint inspection/certification
- ☐ Safety inspection certificates
- ☐ Fair housing compliance records

- ☐ Legal correspondence
- ☐ Court documents (if any)

## **VENDOR & SERVICE CONTACTS**

- ☐ Property manager contact and agreement
- ☐ Handyman/general contractor
- ☐ Plumber contact
- ☐ Electrician contact
- ☐ HVAC technician contact
- ☐ Landscaper contact
- ☐ Cleaning service contact
- ☐ Locksmith contact
- ☐ Insurance agent contact
- ☐ Attorney contact
- ☐ Accountant/CPA contact





