

LIFETIME PROPERTY MANAGEMENT

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

Landlord Document Organizer

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

