

NEXT STEPS

When you decide that O’Connor Properties is the right fit for you and your investment, here are the next steps:

1. Call or email us to schedule a walk thru of the property
2. We will follow up to discuss findings and recommendations and finalize your Management Agreement terms
3. E-sign the Management Agreement
4. Set up your Owner Portal in Buildium (You will receive an email with login information)
5. Gather the following documents:

	Document	Where Can I Find It	Why Do I Need It
	Property Intake Form	Oconnorprops.com	We need to understand property details to provide the best service
	Proof of Ownership	Property Deed, Tax Bill, Proof of Interest in Owner Entity	Only the Property Owner can contract with us to act as their Agent
	IRS Form W9	IRS Website	We must issue you a Form 1099 at the end of each tax year
	Bank Account Request Form	Oconnorprops.com	We make monthly Owner payments through ACH transfer
	Completed Tenant Information Form for Existing Tenants	Oconnorprops.com	We need to contact Tenants about the management change
	Existing Tenant Leases and Ledgers	Your records	The tenant’s lease and ledger continue under management
	Copy of Purchase Inspection Report (if purchased in the last 5 years)	Your records	We use this to understand the Property and plan for maintenance
	Proof that O’Connor Properties, LLC is listed as a Secondary Insured on your Landlord Insurance	Your Property Insurer	This helps protect from liability in a consistent way. It should not cost you anything to add a Secondary Insured
	Copy of HOA documents, if applicable	Your records	We need to understand HOA requirements and know who to notify in the HOA of any issues

6. Upload the documents to Buildium
 - Sign in to your Owner Portal
 - Choose “Requests” from the left side menu
 - Choose “Add a Request” on the upper right corner
 - Add the word “Forms” to the subject
 - Add any notes necessary to the description
 - Drag and drop your forms
 - Choose your property
 - Click “Submit”
7. Provide copies of the keys to your property and all units for access