How can we help?

Trust Administration

- [ ] Trust Account Management
- [ ] Receipt rent and other income in property management software
- [ ] Daily reconciliation with property management software
- [ ] Disbursement to owners
- [ ] End of Month closes
- [ ] EOFY reports and statements
- [ ] Assist staff / owners with financial interpretation of accounts
- [ ] Management and trust account reporting
- [ ] Preparing invoices
- [ ] Managing database
- [ ] Payment of Creditors
- [ ] Bond lodgements
- [ ] Process Bonds Refunds

General Administration

New Managements

- [ ] Load management into system (process agency agreement)
- [ ] Input new owner details and attach property documents
- [ ] Merge and send necessary forms, copies of agreement to all parties
- [ ] Input advertising data and images into property ad tool / websites

Managing Inspections

- [ ] Liaise with PM regarding open times (inspection/open scheduling)
- [ ] Book/Advertise open homes
- [ ] Send email to the tenant with scheduled inspection times
- [ ] Follow up email with interested viewers

Tenancy Application Processing

- [ ] Send and receive application, check for completion and accuracy
- [ ] Screen and credit check applicants
- [ ] Liaise with applicants for additional information/ files if needed
- [ ] Make necessary follow ups
- [ ] Process Application
- [ ] Update CRM Database
- [ ] Close property advertising

Water Rates Management

- [ ] Receive water rates, split fixed and volumetric charges
- [ ] Generate invoices for tenants & owners

New Tenancy

- [ ] Send new tenancy lease agreement for completion
- [ ] Send new tenancy pack
- [ ] Coordinate with PM and schedule ingoing inspection
- [ ] Follow up to settle move in fees
- [ ] Send copies of lease agreement to all parties

Arrears Management

- [ ] Trigger courtesy text or email
- [ ] Extract tenancy ledgers for sending if required
- [ ] Generate weekly arrears reports
- [ ] Trigger breach notice with PM's approval
- [ ] Follow up on breach when necessary

Routine Inspection

- [ ] Coordinate scheduling with PM
- [ ] Generate and send inspection notice and general inspection info
- [ ] Advise and remind tenants about inspection schedule
- [ ] Receive and produce property inspection report

Maintenance Management

- [ ] Receive maintenance requests
- [ ] Seek landlord approval
- [ ] Manage work order or quote request
- [ ] Liaise with tradespeople
- [ ] Follow up as needed
- [ ] Track job progress
- [ ] Advise landlord on completed

Lease Renewals

- [ ] Generate expiring leases report for PM
- [ ] Request lease renewal instruction
- [ ] Contact tenant and offer extension
- [ ] Report to PM if tenant intends to end lease
- [ ] Prepare lease renewal kit
- [ ] Follow up on signed lease

Ending a Tenancy

- [ ] Provide exit checklist
- [ ] If tenant breaks lease, request written notice and advise break fees
- [ ] Update tenant lease end date in PM system
- [ ] Schedule exit inspection
- [ ] Complete inspection report
- [ ] Complete bond return form for approval
- [ ] Follow up as necessary
- [ ] Advertise the property when appropriate

General Administration, Database Management & eFiling

- [ ] Update tenant, landlord, and creditor profiles
- [ ] Filing of documents (signed agreements, invoices, bond forms etc)
- [ ] eFile Auditing and reporting

•:• ManageMe