

## FORM 2~7 Standard Property File Labels

[ company logo, name, and address ]

All properties managed should have files that include the standard labels listed below. Additional files should be added as appropriate.

**Acquisition and Takeover**

- Appraisal
- Correspondence
  - Owner
  - Takeover
- Legal
- Management Agreement
- Management Plan
- Property Takeover
- Real Estate Closing
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**Administration**

- Correspondence (various files as necessary)
- Employee
  - Applications
  - Current (by employee)
  - Past
  - Job Descriptions
  - Miscellaneous
- Forms (samples and form management files)
- Insurance
  - Property
  - Employee
  - Claims
- Inventory (furniture, materials, and supplies)
- Keys and Key Control
- Legal
  - Resident
  - Other
- Licenses and Permits
- On-site Office

(continued)

- Organization
- Reporting Schedule/Information
- Security
- Taxes

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Managing the Physical Asset

- Correspondence—Maintenance
- Capital Improvements
- Inspections
- Maintenance

· Preventive

- Service Contracts (file for each contractor or contract type)
- Maintenance Detail Files (as appropriate, e.g., air conditioning, appliances, carpet, ceilings, doors, electrical, elevators, energy, floor, foundation, gas, halls, heating, janitorial, landscape, lighting, mailboxes, parking lot, pest control, plumbing, remodeling and repairs, roof, shop, signs, sprinkler system, stairs, supplies, trash removal, water and sewer, utilities, walls, windows and window cleaning)
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Marketing and Leasing

- Advertising
- Broch u res
- Comm lesions
- Floor Plans
- Lease Form(s)
- Leasing Policy and Procedures
- Lease—Legal
- Marketing Plan/Studies
- Photographs
- Promotions
- Public Relations
- Signs
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Tenant Management

- Apartment Unit Details
- Collection Procedures
- Correspondence—Residents
- Eviction Procedures
- Move-in/Move-out Information
- Other Income
- Rent Rolls
- Resident Associations
- Resident Leases/Files (one for each apartment unit)
- Resident Ledgers (one for each resident/unit)
- Resident Lists
- Resident Relations
- Rules and Regulations
- Security Deposit Schedule
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Financial Management

- Accounting and Bookkeeping (various files as appropriate for the system in use)
- Banking
- Budgets
- Cash Flow Statements
- Chart of Accounts
- Correspondence—Financial
- Comparative Statements
- Financing (including mortgage information)
- Management Fee
- Operating Statements
- Paid and Unpaid Bills (detail determined by accounting department)
- Purchasing—Vendor List
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NOTE: Filing system should be adjusted to suit systems used.

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	By	Date
Prepared	_____	_____
Approved	_____	_____