

BRANCH CHECKLIST - NEW TENANT

TENANT FIND

NAME: Miss H Morcom

PROPERTY: 3, 10 Oxford Road, St James, Exeter, EX4 6QU

PROPOSED DATE OF ENTRY:

TIME:

	Date	Signed	
Service agreement from LL	N/A		Email to CAD
EPC completed	YES	2019	Save to RPS 'pictures'
Gas Safety Cert (only if provided by LL)	che 9th Jan 2014		Email to CAD
Applicant affordability checked (pcm rent x 30 = £ annual income req'd)	29.5.14	LH	Note in RPS
Guarantor discussed if necessary (must be homeowner & solvent)			Note in RPS
Applicant details discussed with LL for instruction to proceed (inc pets, HB etc)	29.5.14	LH	Note in RPS Register applicant/s on RPS
Brief history forms completed for all applicants 18 yrs & over, plus guarantor (if applicable)	29.5.14	LH	Email to CAD and save to RPS
Referencing monies banked (for all applicants & guarantor) Enter Amount	29.5.14	£180	Note in RPS
Daily Transaction Sheet completed for fees			Email to Accounts and save to RPS
ID obtained for each applicant & guarantor. Photo (passport, driving licence etc). Address (utility bill, bank statement etc)	29.5.14	LH	Save to RPS – Complete Applicant 'ID Check' section
Advise CAD of any special conditions (for consideration)			Email to CAD & add a note in RPS
Send/Email O Let Agreed STC to LL & T	29.5.14	LH	Email Checklist to CAD
Van Mildert Rent Guarantee & Legal Expenses Insurance			Referred for quote? Y/N Note in RPS
Email from CAD to confirm applicants approved			Diarise completion date in RPS
Tenancy agreement received, signed & witnessed by tenants and guarantor (including guarantor deed, if applicable)			Verify or check received at CAD
Receipt received for monies demanded on Entry Statement			Verify, save receipt to RPS & copy to CAD
Deposit paid by bankers draft (payable to LL)			Verify, save copy to RPS & copy to CAD
Issue tenants a copy of the EPC			Note in RPS
Issue keys to tenants			Photocopy keys & save picture to RPS
Send signed TA to the LL for signature with an SAE for return to CAD			Save to RPS and email copy to CAD