BRANCH CHECKLIST - NEW TENANT

MANAGED

NAME: ~~Mr John May~~

PROPERTY: 34 Hadrian Drive, Redhills, Exeter, EX4 1SR

PROPOSED DATE OF ENTRY: ASAP **TIME:**

	Date	Signed	
Service agreement from LL	✓	KB	Email to CAD
EPC completed	✓	KB	Save to RPS 'pictures'
Gas Safety Cert (only if provided by LL)	✓	KB	Email to CAD
Van Mildert Rent Guarantee & Legal Expenses Insurance Required - Note in RPS			Free (6M): Yes / No Referred to VM: Yes / No
Applicant affordability checked (pcm rent x 30 = £ annual income req'd)	✓	KB	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)	✓	KB	Note in RPS
Brief history forms completed for all applicants 18 + (inc Guarantor if needed)	✓	KB	Email to CAD and save to RPS
Referencing fees banked (enter amount)	✓	£ 90	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)	✓	KB	Save to RPS – Complete Applicant 'ID Check' section
Advise CAD of any special conditions (for consideration)			Email to CAD & add a note in RPS
Print/Email O Let Agreed STC to LL & T	✓	KB	Email Checklist to CAD
Complete SOC & Read Meters			Save to RPS & add meter readings to 'General Notes'
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
Obtain tenant signature/s on two copies of ingoing SOC. Give copy to tenants to take away & amend as necessary			Save to RPS & email copy to CAD
Issue tenants a copy of the EPC & GSC			Note in RPS
Issue keys to tenants (with a master set to be retained in the office)			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
Diarise interim inspection			Diarise in RPS
Amended ingoing SOC rec from tenants			Save to RPS/email CAD