



PROPERTY MANAGEMENT

Owner **Onboarding**

Everything we need to know about your property, how our partnership works from first visit to steady management, and what your plan includes.

WELCOME

A property manager that works like an owner

Thank you for considering Apex to manage your property. We handle the day to day so you do not have to: leasing, rent collection, maintenance, inspections, and the paperwork, all in one place. You keep full visibility through your owner portal, and you always know where your money is and what is happening at your property.

This packet walks you through exactly how it works, what each plan includes, and the questions we will ask up front so we can take great care of your property from day one. You can fill this out on paper or complete the same steps online, whichever is easier for you.

One team, in house

Leasing, maintenance coordination, and bookkeeping are handled by our own people, never handed off and forgotten.

You are always in the loop

An owner portal with live statements, maintenance updates, and documents. Approve repairs and read reports anytime.

Local and hands on

We work where we live in Lancaster County, so we know the market, the tenants, and the trades.

Straightforward pricing

A simple percentage of rent collected. No hidden fees, and you choose the plan that fits how involved you want to be.

HOW IT WORKS

From first visit to steady management

Here is what to expect, start to finish. Most owners are onboarded within one to two weeks, faster when the property is vacant and ready.

1

Discovery call

We learn your goals and the basics of the property. This questionnaire gets us started.

2

Property walkthrough

We come see the house in person: assess its condition, photograph it, and note the systems, repairs, and anything that affects the rent.

3

Rental analysis and proposal

We give you a market rent range, the plan we recommend, exactly what is included, and an estimate of your net income.

4

Management agreement

We review the terms together and you sign electronically in your owner portal: the fee, your repair approval limit, included services, leasing and renewal fees, and the term.

5

Onboarding

We collect your documents, set up your owner portal and repair reserve, coordinate utilities as needed, and take key handover.

6

Tenant step

If the home is occupied, we transition your current tenant: transfer the lease and deposit and set up online rent payment. If it is vacant, we handle make ready, photograph and list it, screen applicants, and place a qualified tenant on a signed lease.

7

Ongoing management

Rent collection with monthly statements and payouts, maintenance handled within your approval limit, periodic inspections, lease renewals, and a year end statement for taxes. It is all in your portal.

YOUR PLAN OPTIONS

Simple pricing, tiered to fit you

Our management fee is a percentage of the rent we actually collect, so we only earn when you do. Pick the plan that matches how much you want us to cover.

STANDARD IN EVERY PLAN

Owner portal access · Tenant placement (marketing, screening, and lease signing) · Rent collection with owner payouts · Maintenance coordination with your approval limit · Monthly owner statements · Year end tax statement

	Essential 10% of rent	Plus 12% of rent	Premium 15% of rent
Everything standard (above)	✓	✓	✓
Annual filter replacement	✓	✓	✓
Eviction handling	–	✓	✓
Annual HVAC service	–	✓	✓
Three free lockouts per year	–	–	✓
\$200 included maintenance credit	–	–	✓

The \$200 included maintenance credit on Premium applies in your first year, starting at signing. It is a one time credit and does not roll over month to month. A one time leasing fee applies when we place a new tenant, and a renewal fee may apply when a tenant renews; these are set out in your management agreement.

TELL US ABOUT YOU AND YOUR PROPERTY

Owner & property questionnaire

The more we know up front, the better we can price, market, and care for your property. Answer what you can; we will fill in the rest during our visit.

1 • ABOUT YOU

Your name

Do you own it yourself, or through an LLC or trust?

Business or trust name (if any)

Phone

Email

Mailing address

Best way and time to reach you

Anyone else we should include? (name, phone)

Do you make decisions on your own, or with someone else?

2 • ABOUT THE PROPERTY

Property address

What type of home is it? (house, duplex, condo, etc.)

How many units can be rented?

What year was it built?

Bedrooms

Bathrooms

Square footage (rough)

Parking (garage, driveway, street)

Is there an HOA? Name and monthly dues

☐ Furnished ☐ Unfurnished ☐ Pets OK ☐ No pets ☐ Smoking OK ☐ No smoking

3 • CONDITION & SYSTEMS

What kind of heating and cooling does it have?

About how old is the heating and cooling?

About how old is the water heater?

About how old is the roof?

Which appliances stay with the home?

Any recent updates or renovations?

Anything currently broken or in need of repair?

Water: ☐ City ☐ Well Sewer: ☐ City ☐ Septic Working smoke & CO detectors? ☐ Yes ☐ No

Any known lead paint, asbestos, radon, or mold?

4 • KEYS & ACCESS

How many sets of keys are there?

Any lockbox, garage, gate, or alarm codes?

Do any locks need changing before a new tenant?

5 • WHO IS LIVING THERE NOW

Right now it is: ☐ Rented to a tenant ☐ Lived in by the owner ☐ Vacant

Current tenant name and contact (if rented)

Current rent and when it is due

Lease start and end (or month to month)

Deposit amount and where it is held

When will it be available to rent?

Any issues with the current tenant?

Keep the current tenant? ☐ Yes ☐ No, turning over

6 • MONEY

What monthly rent do you have in mind? (or ask us)

About how much are the yearly property taxes?

Do you have landlord insurance? Which company?

What expenses do you pay now? (utilities, lawn, etc.)

How would you like to be paid, and how often?

OK to hold a small repair reserve? How much?

7 • YOUR PREFERENCES

What matters most to you? ☐ Best rent ☐ Fewest vacancies ☐ Least hassle

How much can we spend on a repair before asking you?

Who handles lawn, snow, pest, filters, trash?

When vacant, keep utilities in your name or transfer?

Any contractors you prefer, or want us to avoid?

How often would you like updates?

Long term plan (keep renting, sell later, not sure)

8 • GETTING IT RENTED

Photos: ☐ We can take them ☐ I will provide photos

Where would you like it listed? (Zillow, etc.)

Any screening preferences? (credit, income, background)

Move in requirements (first, last, deposit)

Anything else we should know?

SECTION 9

Documents & next steps

Bring or upload what you have. We will help you gather anything missing during onboarding.

- ☐ Proof of ownership (deed or settlement statement)
- ☐ Existing lease(s) and any addenda
- ☐ Current tenant ledger / payment history
- ☐ Security deposit records
- ☐ Landlord insurance declaration page
- ☐ HOA or condo documents and rules
- ☐ Appliance manuals and warranties
- ☐ Keys and access devices
- ☐ Utility account details
- ☐ W-9 for owner payouts
- ☐ Photo ID for the owner or signer

WHAT HAPPENS NEXT

1. We schedule your property walkthrough. 2. You receive your rental analysis and plan recommendation. 3. You review and sign the management agreement in your owner portal. 4. We onboard the property and get to work.

Owner signature

Date