

ROOST™ Owner Onboarding Checklist

Complete Paperwork

- Property Management Agreement
- New Owner Form
- Lead-Based Paint Form
- Approve Greetings Letter for Existing Tenants

Accounting Information

- Paperless 1099 Consent form
- W-9
- Direct Deposit Form
- Provide accounting contact

Property Details

- Copies of Current Leases
- Copies of Keys for all Units
- Rent Roll
- Provide utility information
- Section 8 Contact (if applicable)

Communications Setup

- Create Appfolio Account
- Create Property Meld Account