

**THE REMM GROUP**  
**COMMERCIAL PROPERTY MANAGEMENT**  
**TAKE-OVER CHECKLIST**

---

PROPERTY/BUILDING NAME: \_\_\_\_\_  
STREET ADDRESS: \_\_\_\_\_  
CITY/STATE ZIP CODE: \_\_\_\_\_  
TELEPHONE NUMBER: \_\_\_\_\_

NUMBER OF UNITS: \_\_\_\_\_  
CHECKLIST COMPLETED BY: \_\_\_\_\_ DATE: \_\_\_\_\_  
APPROVED BY: \_\_\_\_\_ DATE: \_\_\_\_\_

OWNER'S NAME: \_\_\_\_\_  
MAILING ADDRESS: \_\_\_\_\_  
CITY/STATE/ZIP: \_\_\_\_\_  
TELEPHONE NUMBER: \_\_\_\_\_

DATE OF MANAGEMENT AGREEMENT: \_\_\_\_\_  
TAX IDENTIFICATION NUMBER: \_\_\_\_\_  
OTHER BILLING INFORMATION:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



Accounting/Administration	Assigned To	Commencement Date	Due By	Date Completed
Open bank account(s)				
Interest-bearing				
Non-interest bearing				
Chart of accounts - create new or transpose current records				
Create appropriate journals and ledgers and enter pertinent information				
Accounts payable				
Accounts receivable and aging				
Balances forwarded (from predecessor)				
Individual tenant ledgers				
Rent roll				
Operating expense pass through records				
Collections				
Delinquencies				
Security Deposits				
Vacancies				
Lease Renewals				
New leases				
Schedule of rent escalations				
Tenant information				
Tenant name & address				
Contact person				
Telephone numbers				
Pro rata shares				
Lease terms				
Copy of Skyline database diskette A/R and tenant account information				
Copies of previous month's tenant rent statements				
Obtain individual tenant records				
Lease abstracts				
Estoppel certificates				
Insurance certificates				
Rent increases				
Lease renewals				
Changes to pass-through billing				
Develop general tickler system/ Use Operations Sheet				



<b>Accounting/Administration (Continued)</b>	<b>Assigned To</b>	<b>Commencement Date</b>	<b>Due By</b>	<b>Date Completed</b>
Contract renewals				
Permit(s)/license(s)/renewals				
Rental prospect follow-up				
Obtain financial records from ownership or previous management				
Current balance sheet				
Current operating budget				
Other				
Obtain payroll records				
Arrange for transition & completion of new employee withholding forms and forward to Payroll Department				
Obtain prior operating expense data				
Common area costs				
Pro rata basis for tenants				
Pass-through distribution of charges				
Prepare operating budget				
Other accounting information and records				
Management Agreement - forward to Accounting Manager for management recap				
<b>Insurance</b>	<b>Assigned To</b>	<b>Commencement Date</b>	<b>Due By</b>	<b>Date Completed</b>
Policies				
Fire and extended coverage				
Comprehensive general liability				
Property damage				
Equipment				
Rent loss				
Workers' compensation				
Special endorsements				
Other (e.g. environmental or "pollution" insurance, if appropriate & valuable)				
Plate glass coverage, procedure and contact				
Insurance broker				
Contact name				
Address				
Telephone number (s)				
Insurance carrier(s)				
Contact name(s)				



<b>Insurance (continued)</b>	<b>Assigned To</b>	<b>Commencement Date</b>	<b>Due By</b>	<b>Date Completed</b>
Address				
Telephone number (s)				
Other related information (e.g. outstanding claims)				
Tenant insurance certificates				
Vendor insurance certificates				
<b>Taxes</b>	<b>Assigned To</b>	<b>Commencement Date</b>	<b>Due By</b>	<b>Date Completed</b>
Current billing schedule				
Nest reassessment				
Pass-through distribution				
Copies of recent tax bills				
Tax appeal records (with all legal papers)				
Other tax information				
<b>Notification of New Management</b>	<b>Assigned To</b>	<b>Commencement Date</b>	<b>Due By</b>	<b>Date Completed</b>
Current tenants				
Rent checks payable to new entity (See Administrative Secretary)				
Management contacts				
Tenant headquarters (as appropriate)				
Current vendors, including utilities (Administration has form letters)				
Local governmental agencies				
Fire department				
Police department				
Real estate taxing authority (billing)				
Water/sewer (billing)				
Other				
Operating permits, if necessary				
Occupancy permits, if necessary				
Others				
<b>Building (Property) Information</b>	<b>Assigned To</b>	<b>Commencement Date</b>	<b>Due By</b>	<b>Date Completed</b>
Mailing address				
Legal description				
Architectural information				
"As Is" drawings/floor plans				



Building (Property) Information Continued	Assigned To	Commencement Date	Due By	Date Completed
Floor-by-floor (stack) drawings showing current leased (& vacant) configuration and dimensions				
Square foot measurements of units/building(s) Architect certified				
Construction blueprints				
Remodeling/rehabilitation/renovation drawings, blueprints & status				
Other				
Keys				
Vacancies				
House panels				
Utility rooms				
Roof ladders				
Key log				
Building permits for any on-going construction				
Projects out to bid				
Parking facilities				
Number and type of stalls				
Ratio of stalls to rentable area (per 1,000 square feet)				
Compliance with local parking ordinances				
Provision for handicap access				
Hours of operation				
Rates, if applicable				
Other				
Utilities (electricity, gas, water)				
Number of meters and locations				
Submeters				
Special tenant services				
Billing history				
Arrange for changeover of billing				
Current pass-through distribution of charges				
Other				
Telephone lines/service				
Number of lines/location of jacks				
Telephone line/personnel assignments				
Extra lines for fax/computer modems				



<b>Building (Property) Information</b> Continued	<b>Assigned To</b>	<b>Commencement</b> Date	<b>Due By</b>	<b>Date Completed</b>
Obtain list of current approved vendors (for each)				
Company name and telephone number				
Contact name				
Emergency 24-hour telephone number				
Employer ID or social security number				
Current contract/subcontracts				
Billing history				
Pending accounts payable				
Insurance certificates - current				
Conduct full inspection of the property (See Inspections)				
Conduct physical inventory of site facilities equipment & personal property				
Elevators				
Number				
Type				
HVAC system				
Type				
Age				
Control System				
Responsibility for maintenance (Tenant or Landlord)				
Other systems				
<b>Leasing/Marketing Information</b>	<b>Assigned To</b>	<b>Commencement</b> Date	<b>Due By</b>	<b>Date Completed</b>
Standard lease form - current				
Variant lease form(s) - current				
Subleases				
Assignments				
Current rent schedule				
Base rate per square foot basis (usable or rentable square feet)				
Escalation basis				
CPI				
Periodic percentage increase				
Other				
Pro rata basis				
Utilities				
Taxes				



<b>Leasing/Marketing Information</b>	<b>Assigned To</b>	<b>Commencement Date</b>	<b>Due By</b>	<b>Date Completed</b>
Other operating expenses				
Establish tenant signage specifications				
Common area costs				
Outstanding lease negotiations				
Rental application form(s) - current				
Develop marketing plan				
Review previous plan				
Review prior budget				
Market surveys - current data				
Comparable properties - current date				
Traffic studies - current data				
Current advertising programs/materials				
Newspaper ads				
Brochures				
Other promotional materials				
Develop tenant information package				
List of current vacancies				
Leasing agreements (Commission arrangements, etc.)				
Broker services (Contact names, telephone numbers)				
<b>Construction</b>	<b>Assigned To</b>	<b>Commencement Date</b>	<b>Due By</b>	<b>Date Completed</b>
Construction agreement forms				
Landlord/tenant work specifications				
Building permits for all developed tenant improvements (Copies or originals)				
Approved vendors				
Company, contact name, telephone number				
Other construction information				
<b>Tenant Information</b>	<b>Assigned To</b>	<b>Commencement Date</b>	<b>Due By</b>	<b>Date Completed</b>
Current Leases				
Applications and related information				
Credit Check				
Security Deposits				
Other Deposits				
Correspondence				
Copies of recent letters and notices from prior management				



Current Account Status				
Payments				
Delinquency				
Security Deposits				
<b>Maintenance/Janitorial</b>	<b>Assigned To</b>	<b>Commencement Date</b>	<b>Due By</b>	<b>Date Completed</b>
Inspect equipment and storage areas				
Check compliance with fire codes				
Review safety procedures and compliance				
Check for locks (as necessary or appropriate)				
Inventory equipment, tools, parts and supplies				
Obtain warranties and service manuals for equipment				
Set up maintenance files				
Establish standards and quality controls				
Arrange for transfer of permits/licenses, as appropriate				
Obtain security information and procedures (If appropriate)				
<b>Signage</b>	<b>Assigned To</b>	<b>Commencement Date</b>	<b>Due By</b>	<b>Date Completed</b>
Establish tenant signage specifications				
Exterior of building/monument sign				
Parking				
Handicap (parking/access)				
Leasing/management office				
Elevators (No smoking, permit, emergencies)				
Evacuation (exits, directions for emergency)				
Tenant directory				
<b>Contracts</b>	<b>Assigned To</b>	<b>Commencement Date</b>	<b>Due By</b>	<b>Date Completed</b>
Engineering				
Janitorial services				
Elevator maintenance				
HVAC service				
Preventive maintenance schedule				
Fire extinguisher				
Landscaping services				
External				
Internal				
Exterior finish cleaning				



Concrete steam cleaning (Sidewalks, Garage)				
Sign maintenance				
Security				
Fire/security alarm monitoring				
Waste disposal				
Recycling, if separate				
Answering service - emergency				
Emergency generator				
Leased equipment				
Office equipment service/repairs				
Parking/garage				
Pest control				
Window washing				
Other contracted services				
<b>Permits/Licenses</b>	<b>Assigned To</b>	<b>Commencement Date</b>	<b>Due By</b>	<b>Date Completed</b>
Business license(s) (city/county/state)				
Boiler (operating)				
Air emissions				
Elevator (inspection/operation)				
Alarm system				
Sewer/waste water discharge				
Fuel storage (diesel/gasoline)				
Other applicable permits/licenses				
<b>Employees (Site)</b>	<b>Assigned To</b>	<b>Commencement Date</b>	<b>Due By</b>	<b>Date Completed</b>
<b>Number of employees</b>				
Verify EEO compliance				
Develop and document actions to correct noncompliance				
Establish policies and procedures for on-going compliance				
Complete New status Forms and forward to Corporate Payroll Department				
Obtain current personnel records				
W-4 Forms				
I-9 Forms				
Job application/resumes				
Payroll deduction(s)				
Job descriptions				
Most recent performance evaluation				
Review current employee benefits	Personnel Director/ Administrative Supv.			



Medical insurance	Personnel Director/ Administrative Supv.			
Dental Insurance	Personnel Director/ Administrative Supv.			
Obtain supply of claim forms	Personnel Director/ Administrative Supv.			
Other	Personnel Director/ Administrative Supv.			
Distribute Employee Handbook	Personnel Director/ Administrative Supv.			
Present 401(k)	Personnel Director/ Administrative Supv.			

4. Review all employment documents and procedures for compliance with Equal Employment Opportunity (EEO) requirements

Inspections/Surveys	Assigned To	Commencement Date	Due By	Date Completed
Building exterior				
Roof condition				
HVAC equipment				
Deferred maintenance				
Building interior				
Systems condition				
Surface finishes				
Deferred maintenance				
Structural engineering				
Asbestos				
Building safety				
Air quality monitoring				
Elevator equipment				
Evacuation procedures				
Emergency procedures				
Compliance status				
Environmental impact reports				
Preventive maintenance requirements				
Legal/Regulatory Compliance Status (Also see Permits)®	Assigned To	Commencement Date	Due By	Date Completed
Review applicable regulations				
Obtain prior reports/citations for violations				
Determine current compliance requirements that apply				
Correct any existing noncompliance				
Americans with Disabilities Act (ADA)				



Legal/Regulatory Compliance Status (Also see Permits)⑨	Assigned To	Commencement Date	Due By	Date Completed
Review current practices				
Establish policies and procedures for compliance				
Train personnel				
Environmental regulations*				
Clean Air Act (CAA)				
Specific permit requirements				
Permit posting requirements				
Review current practices				
Establish policies and procedures for compliance				
Clean Water Act (CWA)				
Specific permit requirements				
Permit posting requirements				
Review current practices				
Establish policies and procedures for compliance				
Resource Conservation & Recovery Act (RCRA)☒				
Specific permit requirements				
Permit posting requirements				
Review current practices				
Establish policies and procedures for compliance				
Other potential hazards				
Asbestos				
Electromagnetic fields (EMFs)				
(Leaking) underground storage tanks (LUSTs)				
Radon				
Occupational Health and Safety Act (OSHA) (Also see Life/Safety)				
Review current practices				
Legal/Regulatory Compliance Status (Continued)	Assigned To	Commencement Date	Due By	Date Completed
Establish policies and procedures for compliance				
Tenant compliance information				
Operating permits (copies)				
Emission/discharge permits (copies)				
Equipment (tank tightness) testing results				



Legal/Regulatory Compliance Status (Continued)	Assigned To	Commencement Date	Due By	Date Completed
Notices of violations (NOVs)				
Labeling of hazardous materials/work areas				
Set up tickler system of reminders				
Permit renewals				
Periodic monitoring/testing				
Tenant compliance proofs				
Equal Employment Opportunity (EEO) See Employees				
Obtain files/records on pending legal actions				
Lawsuits				
Other claims				

- 1. New laws and regulations - and revisions of existing ones - mandate awareness of compliance requirements and a review of the compliance status of the property. State and/or local laws may be more stringent than federal laws.*
- 2. Environmental requirements should be incorporated into the property take-over inspections as appropriate.*
- 3. Transportation and disposal of hazardous materials require licensing of haulers and sites and valid permits for these activities. Local or state laws may vary from and be more stringent than federal law*

Life Safety	Assigned To	Commencement Date	Due By	Date Completed
Check for compliance with OSHA - See Legal				
Locate safety equipment (Obtain and install, if necessary)				
Fire extinguishers				
Location list				
Inspection records				
Fire hoses				
Sprinkler system				
Smoke alarms				
First aid kit				
Controls for equipment/utilities				
Obtain current applicable fire/safety codes				
Develop emergency procedures				
Appoint primary response team				
Appoint secondary response team				
List emergency contacts				
Fire department				
Police department				
Ambulance service				
Local hospital				
Civic agencies				



Life Safety	Assigned To	Commencement Date	Due By	Date Completed
Establish evacuation routes/procedures				
Advise management personnel				
Advise tenants				
Check exit and emergency signage				
Develop tenant emergency procedures				
Develop tenant life/safety manual				
Review procedures with fire department				
Other				
Office (On-Site)	Assigned To	Commencement Date	Due By	Date Completed
Inventory of office furniture, equipment and supplies				
Set up procedures for site management				
Obtain/install needed equipment				
Order file cabinets and filing supplies				
Order new/replacement equipment, if needed				
Arrange for telephone service				
Changeover billing of current telephone (if applicable)				
Installation of new/additional telephone lines and equipment				
Obtain supplies of stationery and BLANK forms				
Letterhead				
Envelopes				
Business cards				
Leasing forms				
Rental applications				
Prospect cards/forms				
Standard leases (blank)				
Renewal letters/forms				
Maintenance Forms				
Work requests				
Work orders				
Maintenance logs				
Notice of scheduled maintenance				
Notice of completed maintenance				
Personnel forms				
Job applications				
W-4 forms				



Office (On-Site)	Assigned To	Commencement Date	Due By	Date Completed
I-9 forms				
Performance evaluation				
Personal information change request/notice				
Accounting ledger forms/pages				
Petty cash record				
Receipts (for cash)				
Office (On-Site) (Continued)	Assigned To	Commencement Date	Due By	Date Completed
Other forms, as appropriate				
Purchase requisition forms				
Purchase order forms				
Obtain master key(s) and set up control system				
First Aid Kit				
Employee Handbook				

