PROPERTY MANAGEMENT / 01

BUILD THE PORTFOLIO BRIEF

Give every provider the same property and ownership starting point.

A helpful preparation resource from PickYourPro.ai. Fill in digitally or print. Keep your completed copy private.

Property types, general locations, unit counts, and occupancy status

Current management arrangement and reason I am considering a change

Owner goals, recurring concerns, and the result I want

Existing occupants, vacancies, active leasing, vendors, or transitions to discuss

Ownership team, decision-makers, and preferred reporting contacts

My three priorities for the first management conversation

Preparation only. Not landlord-tenant, fair-housing, lease, accounting, tax, or legal advice.

PROPERTY MANAGEMENT / 02

MAP MANAGEMENT RESPONSIBILITIES

Separate ongoing work, one-time transitions, and owner decisions.

Leasing, marketing, applicant coordination, move-in, and renewal responsibilities

Occupant communication, routine requests, notices, records, and escalation questions

Inspection, maintenance, vendor, emergency, association, and property-access coordination

Income, expense, statement, deposit, invoice, and owner-reporting questions

Owner approval rules, spending or decision questions, and specialist referrals

Excluded services, optional work, separate professionals, and future needs

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PROPERTY MANAGEMENT / 03

SET APPROVALS AND COMMUNICATION

Tick only what is documented or ready to discuss.

- [ ] Every property and current occupancy status is listed
- [ ] Owner goals and recurring concerns are written down
- [ ] Leasing and ongoing-management responsibilities are separated
- [ ] Maintenance and vendor-coordination expectations are ready to discuss
- [ ] Owner approvals and decision authority questions are documented
- [ ] Reporting, records, and communication preferences are identified
- [ ] Location-specific compliance questions are reserved for qualified review
- [ ] Every provider will receive the same requested management scope

Routine contact, after-hours contact, owner update schedule, and response preferences

Approval categories, decision authority, exception process, and documentation needs

Transition records, keys, accounts, documents, vendors, and handoff responsibilities

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PROPERTY MANAGEMENT / 04

QUESTIONS FOR THE MANAGER

Record how this provider would operate, communicate, and document the engagement.

Scope: how are portfolio details, responsibilities, exclusions, and service standards documented?

Team: who handles routine work, leasing, after-hours matters, vendors, and owner communication?

Authority: which decisions are delegated, approved, escalated, or referred to another professional?

Reporting: what activity, financial, maintenance, inspection, and unresolved-item records are provided?

Fees: how does the complete schedule connect to services, events, vendors, and optional work?

Transition and compliance: how are records, accounts, local requirements, and disengagement handled?

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PROPERTY MANAGEMENT / 05

COMPARE THE SAME MANAGEMENT SCOPE

Use A and B in every box. Clarify differences before choosing.

Provider A / Provider B / interview and proposal dates

Portfolio, leasing, ongoing management, maintenance, vendors, and emergencies - A / B

Team, authority, approvals, communications, reporting, and transition - A / B

Fee schedule, exclusions, optional services, written terms, and open questions - A / B

READY TO HEAR FROM PROS?

Create an account on PickYourPro.ai and start a property management request. Share the portfolio, current status, owner priorities, requested responsibilities, approval preferences, and reporting needs so participating pros can compete for your business with proposals. Compare management scope, communications, fee schedules, written terms, and fit.

One request. Every pro's best offer.

Start a request

Participation varies. A portfolio review and planning conversation may be needed before a final management proposal.

Planning guide: https://www.pickyourpro.ai/services/property-management

U.S. Department of Housing and Urban Development: Fair Housing Rights and Obligations (official reference)

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