

Compass Property Management

Owner Information

Date _____

Company Name _____

Phone _____

Owner Name _____

Office _____

Cell _____

Tax ID # _____

Fax _____

email _____

Address _____

City _____ State _____ Zip _____

Alternate Contact _____

Birthdate _____

Management Fee _____% or _____per unit

Closing Books _____ when funds are available
_____ End of Month

\$_____ min balance
(at least sec dep)

Owner Disbursement Y / N

Mail to: _____

Deposit: Bank: _____ Account # _____

Monthly Reports: *Financial*

Transaction

___ Cash Flow

___ Cash Disbursement

___ 12 Month Summary

___ Check Detail Report

___ General Ledger

___ Tenant Payments

Management

___ Rent Roll

___ Vacancy

___ Maintenance History

Special Notes: _____

