



# Onboarding Information Sheet

## Owner Information

LLC or Corp \_\_\_\_\_  
 Name(s) \_\_\_\_\_  
 Address \_\_\_\_\_  
 Phone(s) \_\_\_\_\_  
 Email(s) \_\_\_\_\_  
 TIN/SSN \_\_\_\_\_

## Property Information

Address \_\_\_\_\_ Available Date \_\_\_\_\_  
 Beds \_\_\_\_\_ Baths \_\_\_\_\_ Square Footage \_\_\_\_\_ Year Built \_\_\_\_\_  
 Insurance Carrier \_\_\_\_\_ Policy Number \_\_\_\_\_

NOTE: BE SURE PMI UPSTATE SC IS NAMED AS "INTERESTED PARTY" OR "ADDITIONAL INSURED" ON YOUR POLICY

## HOA Community

|                            |             |     |                |  |              |
|----------------------------|-------------|-----|----------------|--|--------------|
|                            | <i>Name</i> |     | <i>Contact</i> |  | <i>Phone</i> |
| Pool Access                | Fob         | Key | Code: _____    |  | None         |
| Other Amenity Access _____ |             |     |                |  |              |

## Home Warranty

|                 |                      |              |
|-----------------|----------------------|--------------|
| <i>Provider</i> | <i>Policy Number</i> | <i>Phone</i> |
| _____           | _____                | _____        |

## Utility Providers

|             |                |
|-------------|----------------|
| Electricity | Account Number |
| _____       | _____          |
| Water       | Account Number |
| _____       | _____          |
| Gas         | Account Number |
| _____       | _____          |

## Service Providers

Trash \_\_\_\_\_  
 Internet \_\_\_\_\_  
 Cable \_\_\_\_\_  
 Pest Control \_\_\_\_\_  
 Lawn Care \_\_\_\_\_

|   |
|---|
| <b>HVAC Filters</b><br><i>quantity and sizes</i><br>_____<br>_____<br>_____ |
|---|

## Additional Notes

\_\_\_\_\_

## Lease Information

Suggested Rent \_\_\_\_\_ Asking Rent \_\_\_\_\_  
 Lease Term \_\_\_\_\_ Security Deposit \_\_\_\_\_  
 Pet Stipulations \_\_\_\_\_

## Banking Information

Checking \_\_\_\_\_ Savings \_\_\_\_\_  
 Routing Number \_\_\_\_\_ Account Number \_\_\_\_\_

Please make immediate arrangements to get property keys to PMI Upstate SC