



Property Management Division

Presented To:

Future Investor
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Heritage Partners Real Estate is dedicated to being Utah's go to property management brokerage providing top management skills through years of educational property management services, and training.



OUR COMPANY

Heritage Partners Real Estate

Heritage Partners Real Estate is a full service, property management and real estate services company dedicated to providing property owners and investors with a premier, and reliable profitable property management experience.

We provide Property owners with the highest quality property management services using up to date technology that keeps our clients informed of how their investments are performing in real time, while providing tenants of these properties real time access to portals allowing access to online communications, maintenance requests and billing.





PROPOSAL LETTER

Future Investor

I want to thank you for the opportunity to present you with this brochure to provide management services for your investment and home. We are an experienced property management team dedicated to providing the most comprehensive and transparent services to you. With our system portal, you have complete control of your property. We simply provide real time management necessary to successfully manage your property as a team with our investors and owners.

Having been in this property management business as a sales and leasing agent, property manager including 6 years as a property management Franchise Business Coach... Training property management companies on how to run their companies profitably including, how to properly execute and manage tenants. I understand that giving up control to a management company is a difficult thing to do. Let me assure you that we have property management tools to achieve stellar management for your property. Heritage Partners Real Estate teams up with you so you have control over your property as we team up to manage. Our Portal allows you to be as interactive as you wish. Wherever you are, you can access every report, new bill, rental payment etc. easily and understandably by way of your management Portal. You also have instant access to your property manager whenever you need. Tenants have 24/7 emergency portal access.

Your success begins with we ensure your property is occupied as we begin marketing 60 days prior to the current tenants' vacating. We place a resident that will complete the lease term and care for your home as if it is their own. We also know that every expense dollar is important. We have efficient and effective maintenance contractors who, along with our office staff, are dedicated to achieving a successful rental.

Heritage Partners Real Estate has attached a service proposal for your review completed or we will complete your proposal once we receive additional property information. We hope to hear from you soon. We are sure you will find that **Heritage Partners Real Estate** is an extremely competitive and workable brokerage to assure both parties are comfortable within a workable budget.

We look forward to working with you...



OUR COMPANY

Heritage Partners Real Estate prides itself for its experience and expertise in the management of rental properties such as your home or investment. As a client of Heritage Partners Real Estate, you will enjoy real-time information and communication, with the ease of your access to the Portal.



You will be receiving the support of our professional staff, including our third-party vendors who have been handpicked and vetted throughout our association with them. There are no more effective companies than those we work with.



To ensure that your desires and expectations are met, we will communicate as needed with you on a regular basis, We will keep accurate, up-to-date records of income and expenditures from operations and submitting regular financial reports to you by way of our 24/7 portal.



We will provide easy access to each tenant as well as prompt service to their requests. Communications are a key to the process of successfully managing your property. We have an advanced flexible communications system available and will implement it once both parties agree to move forward.



Our approach is full transparency, rather than merely transactional, in that we provide premier services and solutions to our clients'. Heritage Partners Real Estate is designed to build on our relationship and enhance the value of your property through the years by tenants returning properties just as when they moved in.



VISIBILITY CONTROL

Property Management

Maximizing the value of your property or portfolio each year begins with performing property management right — Heritage Partners Real Estate Management Services will help.

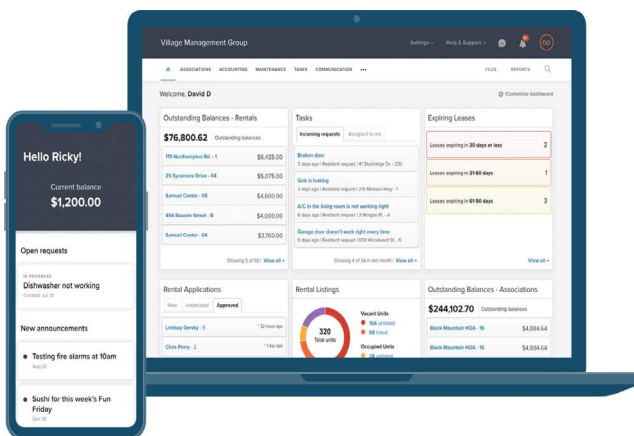
We have performed ethical services and as a result, we are your property management company you can trust with all your properties.

MANAGEMENT
ACCOMPLISHMENTS
IN

PROPERTY
MANAGEMENT

REAL ESTATE
SERVICES

INVESTMENTS



Owners & Tenants

Heritage Partners Real Estate uses transparency software to give you total visibility and complete control. With tools to manage single residential investments, homes, multi-units, condo's, we provide you with superior account management and financial reporting.

Online service requests ✓

Multiple marketing
capabilities ✓

On-demand information
whenever you want it. ✓

MARKETING

Marketing Support

Advanced Marketing is key importance in Marketing on websites and social media when you are renting your property. We use resources available to promote your investment or home, so you can enjoy the benefits.





SERVICE PROPOSAL

Every Process Matters

Details are a major difference between profit and loss, which is why place our efforts in ensuring the accuracy with security of all financial records of your property.

Combining our ethical team with state-of- the-art portal, software, and a proven process, we can give you transparent access to your property's status

"Each month, you will have access to comprehensive reporting that includes the following information"



Property Accounting

- Financial budgets/cash position
- Maintenance cost & invoice
- Banking activity & deposit holding

	2023	2022
Revenue	100.00	100.00
Expenses	20.00	20.00
Net Income	80.00	80.00

Reporting

- Monthly operations & financial reports
- Issues logs, tenants, repairs, contracts
- Priority notifications of any emergency



Vendor Management

- Work orders & progressreport
- Time Tracking & comments
- Inspections& pictures



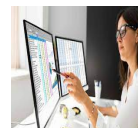
Tenant Management

- Rent collection
- Eviction & residual collection
- New Rental onboarding Preparation



Insurance Administration

- Insurance coverage
- Claims & miscellaneous
- Market rates



Advice

- Leasing management
- Property analytics
- Lead Marketing



SERVICE PROPOSAL

ONLINE ACCESS

- Online Owner/Tenant Portals
- Online Service/Work Orders Request
- On Demand Information 24/7

MAINTENANCE

- Maintenance Coordination
- Move-In Assessments
- Coordinate Repairs If Needed

PROPERTY ACCOUNTING

- Financial Budgets/Cash Position
- Maintenance Cost & Invoice
- Banking Activity & Deposits

LEGAL & COMPLIANCE

- Ensure Insurance Coverage
- Ensure Compliance with Fair Housing Laws
- Assist on Legal Resolutions

REAL ESTATE BROKERAGE

- Heritage Partners Real Estate
- Reduced Listing
- Maximum ROI

PRE-MARKETING

- Inspection of Property
- Recommend Improvements
- Set Marketing Price

VENDOR MANAGEMENT

- Work Orders & Progress Report
- Time Tracking & Comments
- Inspections & Pictures

REPORTING

- Transparent Operations & Financial Reports
- Issues Logs, Tenant, Repairs, Contracts
- Communications & Lead Tracking

ADVERTISING

- Professional Photos and Signage
- Marketing Sites
- 24/7 Website Property Preview

TENANT PLACEMENT

- One-on-One Interview
- Extensive Background Checks
- Disclosures and Agreements Signings



Financial Proposal

SETUP FEE – A one-time Service Plan set up fee of **Bronze** ☐ \$595.00 or **PLATINUM** ☐ \$595.00 ☐ **Waived**.

LEASE ONLY FEE - A one-time leasing fee of ☐ 50% of the 1ST months' rent, or ☐ \$00.00

TENANT EVICTION PROTECTION PROGRAM (TEPP) – (see manager paid service plans in agreement)

BRONZE SERVICE PLAN

- ☐ 1-2 units/properties = \$25 per unit per month
- ☐ 3-9 units/properties = \$15 per unit per month
- ☐ 10+ units/properties = \$10 per unit per month

PLATINUM SERVICE PLAN

- ☐ 1-2 units/properties = \$15 per unit per
- ☐ 3-9 units/properties = \$10 per unit
- ☐ 10+ units/properties = \$5 per unit per

REPAIR RESERVE ACCOUNT:

- ☐ \$500 for single family properties.
- ☐ \$250 per unit for multi-unit properties 4 units.
- ☐ \$50 - \$150 per unit apartment buildings. (subject to condition and age of unit/s)
- ☐ Waived upfront deposit (owner will deposit repair funds upon request of manager prior to repair/s).

MANAGEMENT FEE PAID BY OWNER

BRONZE SERVICE PLAN > The greater of ☐ 8% of monthly gross rental income or ☐ \$105.00 per month deducted from the monthly gross rental income

PLATINUM SERVICE PLAN > The greater of ☐ 8% of monthly gross rental income or ☐ \$00.00 per month deducted from the monthly gross rental income paid.

Management Service Pricing Plans – Next Pages

	BRONZE Service Plan	PLATINUM Service Plan
Portfolio of \$0,000 to \$2,000 in total rents	\$105 minimum	8.00%
Portfolio of \$2,001 to \$5,000 in total rents	\$140	9.00%
Portfolio of \$5,001 to \$11,000 in total rents	\$205	10.00%
READY THE PROPERTY		
Account Setup	\$595 Setup Fee	\$595 Setup Fee
Rental Analysis	✓	✓
Pre-leasing Assessment	✓	✓
Listing Syndication	✓	✓
Photos	✓	✓
Self-Showing Technology	✓	✓
Walk Through Video	\$115 / Video	✓
Marketing Analytics	✓	✓
Rentler and Facebook Marketing	\$55 / Marketing	✓

TENANT PLACEMENT & LEASING		
Leasing Fee	✓	✓
Criminal Background	✓	✓
Credit Check	✓	✓
Financial Review	✓	✓
Employment Verification	✓	✓
Landlord References	✓	✓
Utility coordination	✓	✓
Move-in Assessment	✓	✓
Lease Preparation and Signing	✓	✓
PROTECT THE PROPERTY		
Rent Collection	✓	✓
Accounting Services	✓	✓
Renter's Liability Insurance	✓	✓
Property Assessments	\$95 / Charge	✓
24/7 Maintenance	✓	✓
Project Management	10% of Vendor Invoice	5% Vendor Invoice
Online portal communication	✓	✓
Monthly Reporting	✓	✓

Lease Enforcement	✓	✓
Pet Rent	75% Broker / 25% Owner	50/50
Furnace Filters	✓	✓
Bill Pay	✓	✓
Eviction Protection (TEPP) (<i>see page 6</i>)	\$25/\$15/10 Monthly	\$15/\$10/\$5 Monthly
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RENEW TENANTS		
60 Day Proactive Lease Renewal	✓	✓
Market Analysis	✓	✓
Renewal Fee	✓	✓
Renewal/Move-out Inspection	✓	✓
Security Accounting and Distribution	✓	✓
Year-end Tax Statements	✓	✓
OPTIONAL SERVICES		
Misc. Project Hourly Rate	\$67.50/Hourly	Included
Landscape Oversight	\$50/Project	Included
3 rd Party Document Fee	\$40/Project	Included
Tenant Placement Only	50% First Month's Rent	Not Included
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