LEASING GUIDE

TABLE OF CONTENTS

ORIENTATION

Preface 1
The Leasing Guide: Your Responsibility 2
Orientation 3
Welcome 4
Position: Leasing Consultant 5

FAIR HOUSING

Fair Housing 1
The Fair Housing Act 2
Additional Protection if You Have a Disability 3
Housing Opportunities for Families 3
Guidelines for Non-Discriminatory Leasing 4
Definition of a Family 5
Definition of Handicapped 5
Vocabulary 5
Laws Pertaining to the Handicapped 5
Steering 6
Occupancy Policy 8

PREPARING FOR LEASING

Preparing for Leasing 1
Property Curb Appeal 2
Office Appearance 3
Dress Code 4
Office Hours 5
Target Units and Models 8
Product Knowledge 9
The Leasing Notebook 11
Features/Benefit Selling 12
Examples of Features/Benefit Selling 13

TELEPHONE SALES

Telephone Sales 1
The First Impression 2
Telephone Greeting 3
The Telephone Cue Card 3
Determining the Prospect’s Needs 3
Qualifying The Prospect 4
When the Prospect Qualifies 4
When the Prospect Does Not Qualify 4
Make an Appointment 5
Closing the Telephone Call 5
Your Telephone Image 6
Discrimination and the Telephone 6
Telephone Shops 7
<table>
<thead>
<tr>
<th>TABLE OF CONTENTS</th>
</tr>
</thead>
</table>

**GREETING AND QUALIFYING**

<table>
<thead>
<tr>
<th>Topic</th>
<th>Section</th>
</tr>
</thead>
<tbody>
<tr>
<td>Greeting and Qualifying</td>
<td>1</td>
</tr>
<tr>
<td>Greeting the Prospect</td>
<td>2</td>
</tr>
<tr>
<td>Qualifying the Prospect</td>
<td>3</td>
</tr>
<tr>
<td>The Welcome Card Process</td>
<td>5</td>
</tr>
<tr>
<td>Prospect Identification</td>
<td>6</td>
</tr>
<tr>
<td>Qualifying Standards</td>
<td>7</td>
</tr>
</tbody>
</table>

**DEMONSTRATING THE APARTMENT**

<table>
<thead>
<tr>
<th>Topic</th>
<th>Section</th>
</tr>
</thead>
<tbody>
<tr>
<td>Demonstrating the Apartment</td>
<td>1</td>
</tr>
<tr>
<td>The Property Tour</td>
<td>2</td>
</tr>
<tr>
<td>The Demonstration</td>
<td>3</td>
</tr>
<tr>
<td>Pre-Leasing Occupied Apartments</td>
<td>5</td>
</tr>
<tr>
<td>Overcoming Objections</td>
<td>6</td>
</tr>
<tr>
<td>Ask Questions</td>
<td>9</td>
</tr>
</tbody>
</table>

**CLOSING AND FOLLOW-UP**

<table>
<thead>
<tr>
<th>Topic</th>
<th>Section</th>
</tr>
</thead>
<tbody>
<tr>
<td>Closing and Follow-Up</td>
<td>1</td>
</tr>
<tr>
<td>Closing Techniques</td>
<td>2</td>
</tr>
<tr>
<td>The Follow-Up</td>
<td>4</td>
</tr>
</tbody>
</table>

**MOVE IN**

<table>
<thead>
<tr>
<th>Topic</th>
<th>Section</th>
</tr>
</thead>
<tbody>
<tr>
<td>Move In</td>
<td>1</td>
</tr>
<tr>
<td>The Leasing Day</td>
<td>2</td>
</tr>
<tr>
<td>Application Verification</td>
<td>4</td>
</tr>
<tr>
<td>After the Application Approval</td>
<td>5</td>
</tr>
<tr>
<td>Handling Rejection</td>
<td>6</td>
</tr>
<tr>
<td>Application Cancellation</td>
<td>6</td>
</tr>
<tr>
<td>Preparing the TAA Lease Contract</td>
<td>7</td>
</tr>
<tr>
<td>Explaining the TAA Lease Contract</td>
<td>9</td>
</tr>
<tr>
<td>Preparing the TAA Animal Addendum</td>
<td>9</td>
</tr>
<tr>
<td>Preparing the TAA Satellite Addendum</td>
<td>10</td>
</tr>
<tr>
<td>Preparing the Resident Handbook</td>
<td>10</td>
</tr>
<tr>
<td>The TAA Move-In Inventory &amp; Condition Form</td>
<td>10</td>
</tr>
<tr>
<td>The TAA Lease Brief</td>
<td>11</td>
</tr>
</tbody>
</table>

**MANAGEMENT REPORTING**

<table>
<thead>
<tr>
<th>Topic</th>
<th>Section</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Vacancy Report</td>
<td>1</td>
</tr>
<tr>
<td>Resident’s Notice of Intent to Vacate</td>
<td>2</td>
</tr>
<tr>
<td>Telephone Report</td>
<td>4</td>
</tr>
<tr>
<td>Work Order Follow-Up Log</td>
<td>5</td>
</tr>
<tr>
<td>Weekly Marketing Log</td>
<td>6</td>
</tr>
<tr>
<td>The Mileage Log</td>
<td>7</td>
</tr>
</tbody>
</table>
**SAMPLE FORMS**

<table>
<thead>
<tr>
<th>Form</th>
<th>Section</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sample Forms</td>
<td>1</td>
</tr>
<tr>
<td>Application Verification Form</td>
<td>2</td>
</tr>
<tr>
<td>Daily Checklist</td>
<td>3</td>
</tr>
<tr>
<td>Fair Housing Compliance Checklist</td>
<td>4</td>
</tr>
<tr>
<td>Feature/Benefit Selling Sheet</td>
<td>5</td>
</tr>
<tr>
<td>Key Check Out Log</td>
<td>6</td>
</tr>
<tr>
<td>Lease File Checklist</td>
<td>7</td>
</tr>
<tr>
<td>Monthly Mileage Log</td>
<td>8</td>
</tr>
<tr>
<td>Non-Discriminatory Operating Policies Acknowledgement</td>
<td>9</td>
</tr>
<tr>
<td>Property Tour Checklist</td>
<td>10</td>
</tr>
<tr>
<td>Rental Qualification Guidelines</td>
<td>11</td>
</tr>
<tr>
<td>Resident Handbook</td>
<td>12</td>
</tr>
<tr>
<td>Restricted Breed List</td>
<td>21</td>
</tr>
<tr>
<td>Sample Welcome Home Letter</td>
<td>22</td>
</tr>
<tr>
<td>SunRidge Corporate Sign</td>
<td>23</td>
</tr>
<tr>
<td>Telephone Call Checklist</td>
<td>24</td>
</tr>
<tr>
<td>Telephone Cue Card</td>
<td>25</td>
</tr>
<tr>
<td>Telephone Shopping Report</td>
<td>27</td>
</tr>
<tr>
<td>Utility Verification Sheet</td>
<td>32</td>
</tr>
<tr>
<td>Vacancy Report</td>
<td>33</td>
</tr>
<tr>
<td>Weekly Marketing Log</td>
<td>34</td>
</tr>
<tr>
<td>Welcome Card</td>
<td>35</td>
</tr>
<tr>
<td>Work Order Follow-Up Log</td>
<td>36</td>
</tr>
</tbody>
</table>
PREFACE

This material is prepared in accordance with generally and currently accepted apartment management and leasing principles and procedures. Policies and procedures are written in accordance with state and federal laws; however, the author makes no warranty of any kind, expressed or implied, with regard to information submitted. **This material in no way is intended to be a substitute for a legal opinion and you are encouraged to seek the advice of your attorney regarding implementation of any policies and procedures suggested herein.**

The authors have used their best efforts in preparation of all materials and shall not be liable in the event of incidental or consequential damages in connection with or arising out of the use of any suggestions, guidelines or information submitted.

All computer disks and materials contained herein are copyrighted by **The Resource Company**, and cannot be reproduced except for distribution to all properties of the original purchaser of this manual.

All official Texas Apartment Association (TAA) forms contained in this manual can only be used by TAA members in good standing. Neither the TAA forms nor any part may be reproduced or otherwise copied since the forms are copyrighted by TAA.

Use of forms by non-TAA members is a deceptive trade practice and is a violation of the criminal statutes under Texas Penal Code 32.42.

**All purchasers are encouraged to become a member of TAA in order to utilize the TAA forms and to stay legally informed.**
THE LEASING GUIDE: YOUR RESPONSIBILITY

All Leasing and Management employees are to follow the policies and procedures set forth in the Leasing Guide.

The Leasing Guide will be continually updated from the Corporate Office. It is the Property Supervisor’s responsibility to make the appropriate changes to keep the community’s Leasing Guide current. The Manager must make all employees aware of any new policy.

All forms in this manual are samples only. Please refer to the SunRidge Forms webpage of the SunRidge website to print the latest approved version of any SunRidge form. **DO NOT PHOTOCOPY THE FORMS IN THIS MANUAL.**
ORIENTATION

As you complete this section of the LEASING GUIDE, you will

• Understand your role within the company.

• Identify job duties and qualifications.
WELCOME

You are the front-line representative and the spokesperson for all layers of organizational authority in our company. The prospective resident’s impression of the company and property is initially based on his or her first contact with you. Be aware: you are dealing directly with the customer, and you represent the entire organization. If you have a positive attitude and a passion for excellence, these traits will reflect in outstanding results for you and your property. The structure of our organization is important; however, you are a part of a team, each part relying on the other. Success comes from understanding the company and its different levels working together toward common goals.

Being part of a professional management team means providing service to your existing residents and to your prospective residents. As part of your sales presentation, you should express the benefits of our company and how those benefits will serve your customers.

The Leasing Consultant’s impact on a property is most apparent in the income that the property is able to achieve. The income supplied by the leasing effort provides the basis which supports the rest of the operation. This leasing income is distributed to all the working parts of the property management company, much like the heart pumps the blood supply to the rest of the body. Each part of the company is important to the success of the body as a whole.

You are at the heart of our company and a vital part of its success.
POSITION: LEASING CONSULTANT

REPORTS TO: MANAGER

The purpose of this job description is to communicate the responsibilities and duties associated with the position of LEASING CONSULTANT. While the following information should be considered a comprehensive description of this position, it should also be noted that some responsibilities and duties may not be specifically addressed.

Every person is expected to perform any reasonable task or request that is consistent with fulfilling company objectives.

It is imperative that you review closely these duties, skills and physical requirements and that you understand you are verifying that you can perform all the duties, have the skills and possess the physical abilities necessary to perform the job as described.

JOB BRIEF: The LEASING CONSULTANT is the property’s sales representative whose primary duties are to greet prospects, to present professionally the features and benefits of their assigned property and properly secure lease agreements from qualified persons. A LEASING CONSULTANT is very service oriented and strives to make current residents feel welcome and comfortable in their community. THE LEASING CONSULTANT will contact a person of authority should any situation warrant an action or decision not included in his or her duties and responsibilities.

DUTIES AND RESPONSIBILITIES

- Must have complete knowledge of Fair Housing Compliance laws or attend Fair Housing Training within the first 90 days of employment.

- Must have complete knowledge of lease contract, application and other addenda.

- Must have complete knowledge of SunRidge policy and procedures as outlined in the Employee Handbook and Operations Manual.

- Must immediately notify his or her immediate supervisor or AVP of any illegal conduct by a vendor, resident or other employee.

MARKETING AND LEASING

- Maintain a professional, yet friendly, atmosphere in the leasing office and other areas where prospective residents and residents meet.

- Maintain work area in a clean and organized manner.

- Inspect models and make ready vacancies daily to ensure cleanliness.

- Answer incoming phone calls and handle each call whether it is a prospect call, irate resident, service request, etc. Transfer calls to Assistant Manager or Manager when appropriate.

- Greet prospective residents, qualify and determine their needs and preferences, professionally present the community and specific apartment(s) while pointing out features and benefits.
• Maintain awareness of local market conditions and trends. Contribute ideas to the Manager for marketing the property and for improving resident satisfaction.

• Perform outreach marketing duties.

ADMINISTRATIVE

• Correctly complete all lease applications, process application verification and notify prospective residents of results.

• Complete all lease paperwork including related addenda per SunRidge policy.

• Accept rent and deposit – not to include cash or incomplete money orders. Provide receipt upon request using only approved SunRidge receipts from receipt book.

• Complete Guest Information form on all prospects, send thank you notes and perform follow up.

• Enter phone and/or walk-in traffic from Welcome Cards into the computer daily

• Physically inspect property when on grounds, pick up litter and report any service needs to Manager, to include cluttered patios, inoperable vehicles, broken windows, water leaks, etc.

• Inventory office supplies on a weekly basis. Report needs to manager.

• Organize and file appropriate reports, leases and paperwork daily.

• Attend company meetings when requested.

• Document all resident communication (verbal and written) in lease file conversation log.

• Assist Manager and Assistant Manager in preparation of daily and weekly reports, market surveys, etc.

• Accompany outside vendors on service request calls for occupied apartments when necessary.

GENERAL

• Performs any additional duties assigned by Manager or Property Supervisor.

QUALIFICATIONS

Requirements include maintaining good leasing and closing skills, being and staying organized, and possessing basic computer skills.

Work Hours:
Employee will be required to work a flexible work week which often includes weekends and holidays. Employees work 20-40 hours per week depending on full or part-time status. Overtime must be approved by your supervisor prior to working over 40 hours.
PHYSICAL REQUIREMENTS

• Stand and walk or sit alternatively depending on specific needs of the day. Estimate 70% of time spent on feet and 30% sitting at desk.

• Have constant need (66% to 100% of the time) to perform the following physical activities:
  - Bend/Stoop/Squat
  - Climb Stairs
  - Push or Pull
  - Reach Above Shoulder
  - Pick up litter, filing
  - Show and inspect property
  - Inspect and show property, open and close doors
  - Inspect property, store/retrieve supplies

• Have constant need (66% to 100% of the time) to perform standing and walking activities related to inspecting property and traveling between properties.

• Constant need (66% to 100% of the time) to perform the following physical activities:
  - Writing/Typing/Data Entry
  - Grasping/Turning
  - Finger Dexterity
  - Corporate/inter-office/resident communication
  - Telephone/doorknob use
  - Typing, operation of office equipment

VISION REQUIREMENTS

• Constant need (66% to 100% of the time) to complete forms, read and review reports, answer wide variety of correspondence, view computer screen. Frequent need to see small detail.

• Constant need (66% to 100% of the time) to see things clearly beyond arm’s reach; e.g. inspecting property and showing property.

HEARING REQUIREMENTS

• Constant need (66% to 100% of the time) to communicate over telephone and in person with prospects, residents, vendors and corporate employees.

SPEAKING REQUIREMENTS

• Constant need (66% to 100% of the time) to communicate over telephone and in person with prospects, residents, vendors and corporate employees.

DRIVING/TRAVELING REQUIREMENTS

• Frequent need (66% to 100% of the time) to utilize personal transportation to inspect surrounding neighborhood, make trips to the bank, visit the corporate office, conduct outreach marketing, and run property related errands.

• Must have and maintain a valid driver’s license and automobile insurance.

• Must have and maintain access to street legal, reliable transportation.
WORKING ENVIRONMENT

- Indoors, frequently outdoors, in all weather conditions.
- Occasional exposure (1% to 33% of the time) to paint fumes, solvents, adhesives, etc.

REASONING DEVELOPMENT

- **MODERATE.** Must be able to apply principals of logical thinking to a variety of practical situations and accurately follow standardized procedures that may occasionally call for minor deviations. Needs to think rationally beyond a specific set of instructions.

TESTING

- Leasing Consultant must complete the following tests:
  - Spelling (no more than 7 wrong)
  - Math (no more than 4 wrong)
FAIR HOUSING

After studying this section of the LEASING GUIDE, you will:

- Know how to lease without discriminating.
- Learn more about laws pertaining to the handicapped.
- Understand the definition of “family” and “handicapped”.
- Learn how to use the correct vocabulary when leasing.
THE FAIR HOUSING ACT

The Fair Housing Act prohibits discrimination in housing because of:

- Race
- Color
- National Origin
- Religion
- Sex
- Familial status (including children under the age of 18 living with parents or legal custodians, pregnant women and people securing custody of children under 18)
- Handicap

WHAT HOUSING IS COVERED?

The Fair Housing Act covers most housing. In some circumstances, the Act exempts owner-occupied buildings with no more than four units, single-family housing sold or rented without the use of a broker and housing operated by organizations and private clubs that limit occupancy to members.

WHAT IS PROHIBITED?

**In the Sale and Rental of Housing:** No one may take any of the following actions based on race, color, national origin, religion, sex, familial status or handicap:

- Refuse to rent or sell housing
- Refuse to negotiate for housing
- Make housing unavailable
- Deny a dwelling
- Set different terms, conditions or privileges for sale or rental of a dwelling
- Provide different housing services or facilities
- Falsely deny that housing is available for inspection, sale or rental
- For profit, persuade owners to sell or rent (blockbusting) or
- Deny anyone access to or membership in a facility or service (such as a multiple listing service) related to the sale or rental of housing
ADDITIONAL PROTECTION IF YOU HAVE A DISABILITY

If a resident or prospect:

- Has a physical or mental disability (including hearing, mobility and visual impairments, chronic alcoholism, chronic mental illness, AIDS, AIDS Related Complex and mental retardation) that substantially limits one or more major life activities,
- Has a record of such a disability, or
- Is regarded as having such a disability.

A landlord may not:

- Refuse to let the resident make reasonable modifications to the dwelling or common-use areas, **at the resident's expense**, if necessary for the handicapped person to use the housing. (Where reasonable, the landlord may permit changes only if the resident agrees to restore the property to its original condition when he/she moves.)
- Refuse to make reasonable accommodations in rules, policies, practices or services if necessary for the handicapped person to use the housing.

**Example:** A building with a “no pets” policy must allow a visually impaired resident to keep a guide dog.

**Example:** An apartment community that offers residents ample, unassigned parking must honor a request from a mobility-impaired resident for a reserved space near his or her apartment if necessary to assure that he/she can have access to the apartment.

However, housing need not be made available to a person who is a direct threat to the health or safety of others or who currently uses illegal drugs.

HOUSING OPPORTUNITIES FOR FAMILIES

Unless a building or community qualifies as housing only for older persons, its leasing requirements may not discriminate based on a familial status. That is, the requirements may not discriminate against families in which one or more children under 18 live with:

- A parent
- A person who has legal custody of the child or the children
- The designee of the parent or legal custodian, with the parent or custodian’s written permission.

Familial status protection also applies to pregnant women and anyone securing legal custody of a child under the age of 18.
Exemption: Housing for older persons is exempt from the prohibition against familial status discrimination if:

- The HUD secretary has determined that it is specifically designed for and occupied by elderly persons under a federal, state or local government program, or

- It is occupied solely by persons who are 62 or older, or

- It houses at least one person who is 55 or older in at least 80% of the occupied units; has significant services and facilities for older persons; and adheres to a published policy statement that demonstrates intent to house persons who are 55 and older. The requirement for significant services and facilities is waived if providing them is not practicable and the housing is necessary to provide important housing opportunities for older persons.

A transition period permits residents on or before September 13, 1988, to continue living in the housing, regardless of their age, without interfering with the exemption.


GUIDELINES FOR NON-DISCRIMINATORY LEASING

STATEMENT OF RENTAL POLICY

It is company policy (and a law of the United States of America) that any discrimination based on the following criteria is prohibited. Review the Non-Discriminatory Operating Policies Acknowledgement in the Sample Forms section.

Under no circumstances shall the following be reasons for refusing housing:

- Race
- Color
- National Origin
- Religion
- Sex
- Physical or Mental Disability
- Familial Status

If you, as an employee, feel you have been harassed or discriminated against, contact your Property Supervisor.

Discrimination is also prohibited when dealing with current residents. Review the Fair Housing Compliance Checklist in the Sample Forms section.
DEFINITION OF FAMILY

A family is defined in the Fair Housing Amendments Act of 1988 as one or more individuals under the age of 18 years being domiciled with:

- A parent or another person having legal custody of such individual(s), or
- A designee of such parent with the written permission of such parent.

A person who is pregnant or in the process of obtaining legal custody of a person under 18 years of age must be treated as a family.

DEFINITION OF HANDICAPPED

A person who has a physical or mental impairment which substantially limits one or more of that person’s major life functions, which include caring for oneself, performing manual tasks, walking, seeing, hearing, speaking, breathing, learning or working.

VOCABULARY

Effective March 12, 1989, the words “all-adult”, “adult area”, “family area”, “family pool”, “family section”, “adults only”, “family (or adult) oriented”, “adult (or family) living”, must be deleted from your leasing vocabulary.

Pools have rules for the enjoyment of all residents. There are no “family sections”, as families and adults must be offered the same rental units without distinction.

Notice also that the statement of rental specifies “occupants.” If two persons are permitted in a one bedroom apartment, the following are examples of two occupants:

- Married couple
- Two roommates (same or opposite sex)
- Mother and child under 18
- Father and child under 18
- Legal guardian and child under 18

LAWS PERTAINING TO THE HANDICAPPED

If a handicapped person wants to move into a property, that person has the right to do so. If modifications to the entry or the interior of the apartment are necessary, the handicapped person must pay for such changes. Examples of such modifications would include ramps, grab bars in bathrooms, wider door openings, and lower light switches. Management has the right to approve such changes to be certain that they will conform to building codes. A handicapped person may also make changes to common areas (pools, laundry rooms, and mail rooms, for example) under the same rules that he or she pay for such changes with management’s prior written approval.

The handicapped person will also be required to restore the premises to a reasonable condition upon moving out of the property.
**Does the law mean that I will have to lease to all families and all handicapped persons?**

**No.** Standards for living at the property must be applied equally. A prospect’s credit rating, prior history and employment standards still apply. It is not discrimination if someone (or family or handicapped person) has a bad prior residence history and you reject them. You will be discriminating if you don’t apply these laws equally to all prospects.

**STEERING**

Steering is an attempt to refer prospects to:

- other properties,
- certain buildings or areas within your property, or
- areas on the property such as playgrounds, busy roads, etc.

The following are examples of Steering (Wrong) and the same statements rephrased in a non-discriminatory way (Right):

**WRONG**

Walking from the information center to the model, you say, “Most of our families live near the playground.”

**RIGHT**

“We have a playground located near the mail room. Let me show it to you.”

**WRONG**

“The schools serving our properties are lousy.”

**RIGHT**

*Offer factual information about locations of schools or school bus stops, but do not offer subjective information about a school’s quality or reputation. Encourage the prospect to visit the schools from sources other than you.*

**WRONG**

“Most families don’t want to live… (near a busy street, next to the creek, on the third floor).”

**RIGHT**

“…is a heavily traveled street.”

**Can children of the opposite sex share a bedroom?**

**Yes.** This is a parent’s decision, not yours or the company’s. We can only establish occupancy limitation (i.e., number of persons in an apartment).
Can we still have “specials”?

Yes. All specials must be in writing, documented and offered to everyone. A verbal special is potentially very dangerous because there is no way to prove that such a special was offered to every prospect. Rather than use phrases such as “Ask me about our specials”, we need to be specific (e.g.; $20 off all 3rd floor one-bedrooms, expires April 30th).

For this reason it is important to update the rental schedule on a regular basis.

How do rules regarding bicycles apply?

The resident policies state that riding bicycles or motorcycles on sidewalks is prohibited. This applies to all residents – children and adults.

Can we limit families to the first floor?

No. This is discriminatory. Which floor to live on is a prospect’s decision.

Can a handicapped person have a parking space in front of his/her apartment?

Yes, if that person will pay for the signs and markings.

Why was the law changed to add families and the handicapped as protected classes?

The Fair Housing Amendments Act had three goals:

- Give HUD authority and power to enforce existing fair-housing laws.
- Make more housing available to families (and the homeless) as it is perceived that there is a shortage of such housing.
- Broaden protection of housing rights for the handicapped.

What are the penalties for discrimination?

A person who can prove discrimination can receive damages awarded by a federal court or an administrative law judge. A company will be fined $10,000 for the first offense, $25,000 for the second offense and $50,000 for the third offense.

A Leasing Consultant or other on-site employees can also be found personally liable for equal fines.

Are older persons forced to live with families and young children?

The Fair Housing Amendment Act of 1988 creates two exceptions based on:

- A community where all persons are over the age of 62, or
- At least 1 person in each unit is over 55 and certain services exist and activities offered to cater to these people.
Can we offer senior citizen discounts?

Yes, if senior citizen discounts are part of your leasing policy and are applied equally to all seniors.

Does this apply to verification procedures?

Yes, in two important ways:

- First, you must make a note of the person’s name you spoke with to obtain prior residence or employment information. Make detailed notes, especially if an applicant’s history is poor.

- Second, all prospect leasing information must be retained for 2 ½ years. This is because the person who thinks he or she may have been discriminated against has up to 2 years to file a complaint with HUD. Holding the file for 30 months puts us safely past any processing delays within HUD after a complaint has been filed.

REMEMBER: Do not discriminate; do not steer prospects; do treat all persons equally; and know our statement of rental policy and other policies.

OCCUPANCY POLICY

According to the Fair Housing Amendment Act of 1988, Section 100.10 (A) (3), Owner is permitted to allow reasonable limitations on occupancy, as long as these limitations are applied to all occupants and do not discriminate on the basis of race, color, national origin, religion, sex, handicap or familial status.

Check with local city ordinance for additional protected classes.

All properties under the management of SunRidge Management Group, Inc. will strictly follow these occupancy restrictions*:

<table>
<thead>
<tr>
<th>Unit Size</th>
<th>Maximum Occupants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Efficiency</td>
<td>2</td>
</tr>
<tr>
<td>One Bedroom</td>
<td>3</td>
</tr>
<tr>
<td>Two Bedroom</td>
<td>5</td>
</tr>
<tr>
<td>Three Bedroom</td>
<td>7</td>
</tr>
</tbody>
</table>

*Unless otherwise approved in writing by the owner or owner’s representative. Review the Rental Qualification Guidelines in the Sample Forms section.
PREPARING FOR LEASING

As you complete this section of the LEASING GUIDE, you will learn:

- Standards for office appearance.
- Specified office hours.
- Dress code guidelines.
- Policies regarding smoking, music and eating in the office area.
- The importance of a target unit.
PROPERTY CURB APPEAL

When prospects visit, they notice the appearance of:

- Your Property.
- The Leasing Office.
- The Models and Ready Units.
- The Staff.

As a Leasing Consultant, you have to be objective about your property. You may live on property and lose your keen eye as everything becomes familiar. Or, if you take the same route to work every day, you may fail to see the entire property.

You are as responsible as anyone for ensuring that your property is in impeccable condition. Walk your property every day, and take alternate routes when you drive. Be aware of any areas that need attention, and bring them to the attention of the Manager.
OFFICE APPEARANCE

The office should be neat, clean, fragrant and ready for business at all hours during the day.

YOU NEVER GET A SECOND CHANCE TO MAKE A GOOD FIRST IMPRESSION

CLEANING PROCEDURES

Office personnel will be responsible for cleaning the office. Daily duties to be performed prior to business or after office hours are, but not limited to:

- Carpet Vacuumed
- Furniture Dusted
- Trash Baskets Emptied
- Entry Doors Cleaned
- Office Windows Cleaned
- Exterior Smoking Area Maintained
- Client Refreshments Refreshed Throughout the Day and Cleaned

DESKS

- Property files and records should never be left in view of prospects or residents.
- Desks should be free of clutter.
- Limit personal photographs to 2, framed and appropriate, at your desk.
- Unnecessary pens, paper, forms, etc. should be placed in drawers.
- No homemade items on the desks or walls.

SMOKING

- No smoking allowed in any office, shop or unit at any time, including after hours.
- Designated smoking area should be provided in an area away from the entry.
- Employees, both management and maintenance, are not permitted to smoke in any area that has prospect and resident traffic.

ATMOSPHERE

- Background music should be used to make the office area more comfortable.
- Country western, pop, rock or trendy music is not permitted.
- Volume should be low so verbal communication is not difficult.
- Do not burn candles. Keep spray air freshener in your desk and use when necessary.
MAIL OR DELIVERIES

- An area in a closet or storage room should be designated for resident’s mail or any other deliveries.

- **Residents signed a package release when signing the Resident Handbook. A picture I.D. is required to pick up deliveries. Do not release packages to anyone other than the name on the package.** Review the Resident Handbook in the Sample Forms section.

- Do not pile boxes or envelopes on the front desk or office floor.

- Maintenance deliveries must go directly to the maintenance area.

KITCHEN

- Keep clean at all times.
- Sink always empty of dirty dishes.

LUNCHES/SNACKS

- *Never eat at your desk.*
- Mobile phones, personal pagers, PDA’s, iPods and other personal equipment must be off during work. You may check during your break.

COMPANY COMPUTERS

- Office computers are for office use only – at all times.
- See the SunRidge Computer Use Policy in the Company Premises and Work Areas section of the Employee Handbook, entitled “Use of Property and Equipment.”

REMEMBER: The office appearance is everyone’s responsibility.

- Clean the office prior to or after business hours.
- Desks should be free of all unnecessary items.
- Employees are not permitted to smoke in any areas of the property except the designated smoking area.
- The only music permitted in the office is soft, easy-listening music.
- Employees should never eat at their desks.
- The office computer is never for personal use of any kind.
DRESS CODE

Office employees often have contact with the public and therefore represent the company in their appearance as well as by their actions. Good grooming and appropriate dress are an important part of the company's public image. In positions where uniforms are required, employees should ensure that uniforms are clean, ironed (if applicable) and crisp at all times.

All clothing should be functional to the job requirements. The dress and grooming of on-site employees is to be governed by the requirements of safety and comfort. If an employee reports for work improperly dressed or groomed, the Manager should instruct the employee to return home to change clothes or to take other appropriate corrective action. The employee will not be paid until the employee returns to work appropriately dressed.

Special dress codes may be required. These codes will be determined by your AVP. If a uniform is required for your position, the employee must wear it. It is the responsibility of the employee to see that it is clean, ironed (if applicable) and in good repair at all times.

Name badges are required for all employees. Maintenance must wear picture name badges. Office employees must wear clip-on name badges provided by the Corporate Office.

YOU ARE A PROFESSIONAL!

MAINTENANCE PERSONNEL (MEN & WOMEN)

- All Maintenance personnel are required to wear clean uniforms daily.
- Belts must be worn with shirts tucked in.
- Hair must be styled and clean.
- Men should be clean shaven or beards neatly trimmed.
- Only SunRidge ball caps can be worn. (If a cap is worn it is considered part of the uniform.)
- Tattoos must be covered.
- Hair should be conservatively styled and clean.
- Conservative earrings are permitted (women). No other visible piercings are permitted.
- All clothing must be clean and pressed.
- Photo name badges are required.

- All new maintenance staff members must wear a solid color, logo-free shirt until uniforms are provided.
PROFESSIONAL DRESS CODE FOR MEN

- Either a suit or dress slacks and shirt is required.
- A belt must be worn along with matching shoes and socks.
- Collared dress or golf shirts. Shirts must be tucked in.
- Hard-soled dress shoes are required. Shoes should be polished and in good condition.
- Hair should be conservatively styled and clean. Long hair must be kept in a ponytail.
- Facial hair should be neatly trimmed.
- Tattoos must be covered.
- All clothing must be clean and pressed.
- Name badges are required.

NOT PERMITTED:

- Blue Jeans
- T-Shirts
- Western Boots
- Flip-Flops
- Tennis Shoes (except with Summer Dress Code)
- Piercings

PROFESSIONAL DRESS CODE FOR WOMEN

- Suits, dresses and/or coordinated skirt/trouser/blouse ensemble is required.
- Unless specifically made to be worn un-tucked, all blouses/shirts must be tucked in.
- If hose are worn; no runners, patterns or decorations.
- Hard-soled dress shoes are required. Shoes should be polished and in good condition.
- If worn, make-up should be appropriately applied for day wear.
- Hair should be conservatively styled and clean.
- Conservative jewelry is permitted.
- Tattoos must be covered.
- All clothing must be clean and pressed.
- Name badges are required.

NOT PERMITTED:

- Skirts shorter than 1” (one inch) above the top of the kneecap
- Any tight-fitting ensembles
- Tight or casual slacks
- Blue Jeans
- Casual tops or blouses exposing the midriff
- Any low-cut or low-back dresses
- See-through fabrics
- Flip-flop shoes, slide-style shoes, ankle wrap shoes and canvas shoes
- Piercings (no other visible piercings except earrings)
SUMMER DRESS CODE FOR MEN*

- Solid colored walking length shorts or casual work pants.
- Only SunRidge approved, tailored shirts.
- Shirts must be tucked in.
- Clean, non-decorative tennis shoes.
- Hair should be conservatively styled and clean. Long hair must be kept in a ponytail.
- Facial hair should be neatly trimmed.
- Tattoos must be covered.
- All clothing must be clean and pressed.
- Name badges are required.

NOT PERMITTED:

- Shorts shorter than 1” (one inch) above the top of the kneecap
- Blue Jeans
- T-Shirts
- Western Boots
- Flip-Flops
- Piercings

SUMMER DRESS CODE FOR WOMEN*

- Solid colored walking length shorts, casual work pants or Capri pants.
- Only SunRidge approved tailored shirts or blouses.
- Unless specifically made to be worn un-tucked, all blouses/shirts must be tucked in.
- Clean, non-decorative tennis shoes.
- If worn, make-up should be appropriately applied for day wear.
- Hair should be conservatively styled and clean.
- Facial hair should be neatly trimmed.
- Conservative jewelry is permitted.
- Tattoos must be covered.
- All clothing must be clean and pressed.
- Name badges are required.

NOT PERMITTED:

- Shorts shorter than 1” (one inch) above the top of the kneecap
- Any tight-fitting ensembles
- Blue Jeans
- Shirt, casual tops or blouses exposing the midriff
- T-Shirts
- See-through fabrics
- Flip-flop shoes, slide-style shoes, ankle wrap shoes and canvas shoes
- Western Boots
- Piercings (no other visible piercings except earrings)

*SUMMER DRESS CODE IS ALLOWED FROM MAY 1ST THRU SEPTEMBER 30TH.
OFFICE HOURS

Monday-Friday 9:00am to 6:00pm
Saturday 10:00am to 5:00pm
Sunday 1:00pm to 5:00pm

- Hours may be extended by corporate direction based on specific property requirements.
- Properties at 95% occupancy and 95% trend can close on Sundays with approval from your AVP.

OFFICE NOTICES

- Office hours, the office telephone number and emergency numbers must be placed on a permanent sign on the front door.

- Fair Housing posters must be placed in clear view in the main leasing area.

- A sign must be placed in a visible location indicating that government issued photo identification is required in order to see an apartment.

- SunRidge Rental Qualification Guidelines including the privacy policy statement must be framed and hung on the wall in clear view in the main leasing area. Review the Rental Qualification Guidelines in the Sample Forms section.

- Each property must have a permanent sign to post when it is necessary to leave the office during working hours.

- SunRidge Corporate office contact sign must be displayed. Review the SunRidge Corporate Office Sign in the Sample Forms section.

- When the office will be closed on recognized holidays, notify the residents via the newsletter or notices in heavy-traffic areas at least three (3) days in advance. All notices must be professional and computer-generated.

- **Offices are not closed for lunch unless only one employee is on duty.**
TARGET UNITS & MODELS

IT IS MANDATORY THAT TARGET UNITS ARE DETERMINED, THEN WALKED DAILY BY 9:15 AM.

There are two types of “show units:” target units and models. Target units are vacant, un-leased apartments, usually the apartment you have had vacant the longest. A model apartment is a designated unit that has been decorated with furniture and set up in a “model home” type setting.

Target units are also called “mini-models” since they do not contain large furniture but have some decoration such as shower curtains, towels, tent cards, miscellaneous decorations and barstools, for example. It is SunRidge policy to have a target unit in each vacant floor plan.

A target unit is the Leasing Consultant’s selling tool. It is a representation of what the resident’s make ready will look like. Target units are set up so that the prospect may envision the apartment as home, not just vacant rooms. A vacant apartment with no furniture looks smaller than an apartment with some decorative touches. Most people do not have the imagination to know how the apartment will look furnished. The target unit shows them how versatile and livable the apartment home can be and also gives the prospect ideas of how he or she could furnish and arrange his or her own apartment.

It is important that the target unit is put to use. Show the target unit first and then show the vacancy. The target unit should be used in conjunction with the floor plans to sell an apartment with a plan different from the target unit. By comparing the two units it is easy for the prospect to visualize how his or her apartment will look.

The target unit is also an excellent tool for pre-leasing. Show the target unit first, and then show the prospect the location of the unit that will be available, indicating carpet color and any other special features. Do not ask the prospect if he or she wants to see the target unit; just simply say, “Let’s take a look at our target apartment to give you some idea of what your new home might look like.” This is the time to discuss the type and arrangement of the prospect’s furniture. It is the responsibility of the Leasing Consultant to see that the target unit is well maintained. The following procedures should be used:

- Walk the target unit(s) daily no later than 9:15am.

- Target units must be freshened on a daily basis. Minor touch up can be performed by a Leasing Consultant. Cleaning should be assigned to housekeeping personnel. Carpets should be vacuumed, floors waxed, furniture dusted, bathrooms and kitchen must sparkle. Make sure there are no offensive odors. Deodorize with a “fresh” scent.

- Each target unit should have a Sparkle Bucket consisting of the following items:
  - Paper towels
  - Window or glass cleaner
  - Air freshener
  - Dust cloth
  - Furniture cleaner
  - Light bulbs
  - Trash bags
  - Blank service request forms
• Make sure everything is in working order. If something requires a service request, make sure it gets repaired immediately.

• All balconies and patios should be swept on a regular basis.

• Doormats should be purchased for the front door of each target unit.

• The air conditioner and heating should be maintained at 80° in the summer and 65° in the winter.

• First thing each morning and last at the end of each day, you should flip the circuit breakers marked to turn off the lights. However, be sure to leave the air conditioning/heat and refrigerator ON.

• Refrigerator should be at warmest permittable setting.

• Radios should be kept on an “easy listening” station.

• All blinds should be open during the day, closed in the evening. Only turn lights on during the day in dark areas of the apartment.

Review the Daily Checklist in the Sample Forms section.
PRODUCT KNOWLEDGE

As a Leasing Consultant, you should:

- Be thoroughly knowledgeable with information concerning your product.
- Maintain a Leasing Notebook and learn what it can do for you.
- Familiarize yourself with what Target Units are available daily.
- Determine the features and benefits of each unit type in order to be better prepared to “sell” your product.

You must have the confidence required to perform your job and have thorough knowledge of your product.

To be effective in your role, you will need to know:

- Room sizes, square footages
- Quality/construction features
- Brand/type of appliances
- Familiarity of all amenities; e.g., pool, tennis courts, etc.
- Lease terms
- Rental rates
- Energy efficiency features
- Apartment features; e.g., vaulted ceilings, fireplaces, etc.

One vital tool that will enable the Leasing Consultant to ensure product knowledge is the Leasing Notebook.
THE LEASING NOTEBOOK

To assemble your Leasing Notebook, you will need to gather material on your property and neighborhood. Each Leasing Notebook should contain the following sections:

- Convenience List
- Area Business Information
- Miscellaneous
- Welcome Cards
- Maps
- Floor Plans
- Sister Community Information

WELCOME CARDS

Keep extra blank copies of the Welcome Cards. Review the Welcome Card in the Sample Forms section.

FLOOR PLANS

Have a copy of each community floor plan with a corresponding list of feature/benefits (as in this section), rates and room dimensions (including wall measurements).

MAPS

- A city map, highlighting the community
- An area map, highlighting the community and neighborhood facilities
- A property site plan, highlighting community amenities

CONVENIENCE LIST

- Utility information
- Churches, schools, hospitals, libraries, post office
- Shopping centers, grocery stores, cleaners

MISCELLANEOUS

- Newsletters
- Calendar of Events
- Resident Activities

FRONT & BACK POCKETS

- Lease & Rental Application
- Tape Measure
- Welcome Cards

SISTER COMMUNITY INFORMATION

If there are other SunRidge communities within your same geographical area, you should maintain the same information for those communities as you have included for your community in the Leasing Notebook. The purpose of this section is to be able to refer the prospect to another SunRidge community in the event that we are not able to accommodate them at your community.
FEATURES/BENEFIT SELLING

Before you can sell your product, you must have detailed information concerning each floor plan. On the following page are some examples of Feature/Benefit selling. You will need to prepare a Feature/Benefit Selling Sheet for each unit type on your property. Review the Feature/Benefit Selling Sheet in the Sample Forms section.

Keep Feature/Benefit Selling Sheets in your Leasing Notebook for easy reference.

EXAMPLES OF FEATURES/BENEFIT SELLING

In this career it is oftentimes not what you say but how you say it. Instead of using words to describe what you are showing the prospect, paint word pictures.

- Don’t sell me clothes – sell me neat appearance, style, attractiveness.
- Don’t sell me shoes – sell me foot comfort and the pleasure of walking in the open air.
- Don’t sell me candy – sell me happiness and the pleasure of taste.
- Don’t sell me furniture – sell me a home that has comfort, cleanliness, contentment.
- Don’t sell me books – sell me pleasant hours and the profits of knowledge.
- Don’t sell me toys – sell me playthings to make my children happy.
- Don’t sell me tools – sell me the pleasure and profit of making fine things.
- Don’t sell me refrigerators – sell me the health and better flavor of fresh kept foods.
- Don’t sell me tires – sell me freedom of worry and low cost per mile.
- Don’t sell me things – sell me ideals, feelings, self respect, home life, happiness.

Please don’t sell me things – sell me benefits.
TELEPHONE SALES

As you complete this section of the LEASING GUIDE, you will learn:

- How and when to answer the telephone.
- The goal of your telephone conversation.
- The impact your voice has on the prospect.
- How to be prepared for calls.
- Questions that can help you know if you are answering the telephone correctly.
THE FIRST IMPRESSION

The prospect’s first impression of your property is determined by your attitude over the telephone.

- Answer the telephone by the second ring. **NEVER let the phone continue to ring.**
- Be ready to begin the conversation when you answer the telephone. In other words, do not pick up the receiver while continuing a conversation with someone in the office.
- Have a pen and make sure the Leasing Notebook, Telephone Cue Card and Welcome Card are at hand.

The key to using the telephone successfully is in your personality. Prospects cannot see you, but they hear everything you say. This makes a lasting impression. **You never have a second chance to change their first impression.**

Remember to always be prepared. When you have all of the information at hand and know your product (the exact location and appearance of the show units), you will handle the call with ease and confidence.

**Please understand - your goal is to make an appointment for the prospect to visit the property. You are not merely an information center. Create a desire in the prospect so that he or she will want to see what you have to offer!**

Remember:

- Be prepared.
- Answer promptly with a smile!
- Sell – don’t just give information.
- Telephone shops are conducted on a regular basis.

Review the Telephone Cue Card, Welcome Card and Telephone Shop in the Sample Forms section.
TELEPHONE GREETING

When the telephone rings, there is no way for you to know who the caller is. Assume it is always a resident or prospect, and treat each caller with the same warmth and interest. This is an opportunity to help someone feel better about his or her day.

When you answer the telephone, your greeting should always be pleasant and personalized stating your name. By giving the prospect your name, he or she is more likely to offer his or her name. An example of a good telephone greeting is,

"Thank you for choosing The Happy Homes Apartments. This is Sally."

Putting a prospect on hold is discouraged, however, if it is necessary they should hold no longer than 30 seconds. If you are alone in the office and absolutely cannot give the prospect the attention he or she deserves, it is permissible to return the call. But, make sure you handle this response warmly! Then, follow up as quickly as possible.

THE TELEPHONE CUE CARD

In order to help you ask all the pertinent information, SunRidge has developed a telephone cue card. You will find the cue card at every leasing desk on every SunRidge property. The cue card is also a great way to make sure you are consistent on the telephone.

Before answering the telephone for the first time, be sure you are familiar with all the questions on the telephone cue card. Practicing with a co-worker or calling a friend to rehearse is encouraged. It is always uncomfortable the first time you read through the script so it’s important you practice first.

Review the Telephone Cue Card in the Sample Forms section.

DETERMINING THE PROSPECT’S NEEDS

Before you can assist the prospect, you must determine his or her needs. This does not give you permission to interrogate the prospect, but by engaging in a friendly conversation with a caring attitude you can ask questions more comfortably. The answers are the key to your sales success. If you follow the cue card you will determine the following:

- How soon prospect needs the apartment
- What size apartment prospect wants
- How many people will occupy the apartment
- If there are pets and their type/size
- If prospect has any special needs (might include handicap, location, color scheme or view)
- How prospect heard about your property

The prospect’s answers to these questions will lay the foundation to qualifying the prospect, discussed more below.
Early in the process, you need to know the prospect’s name. Asking the prospect’s name is common practice. It is common when calling a business establishment to exchange names. And, if you have answered the phone properly, they already have your name! By using his or her name while asking questions, you create a more comfortable situation. Plus, everyone likes for people to use their name...don’t you?

Remember:
- Show a sincere desire in the prospect.
- Offer your name when answering.
- Get prospects name and use it often.
- Determine prospects needs.

QUALIFYING THE PROSPECT

As you are following the telephone cue card you are not only determining the prospect’s needs, you are also making sure the prospect meets our rental qualification guidelines. Asking if the prospect has a pet and what type; when the prospect will be moving and the number of people occupying the apartment ensures our occupancy guidelines are met.

WHEN THE PROSPECT QUALIFIES

Your product knowledge is the key. You must be able to describe the property and apartments in such a way as to create a real desire in the prospect. Paint word pictures. Use words that enable the prospect to visualize the apartment. Consider conversations such as this...

"Ms. Jones, the perfect apartment home is coming available just when you need it! It is one of our largest apartment homes. The beige carpet is almost new – I know that is important to you.

This particular home is on the end of the building, so it has more windows. You can actually see the sun set from your balcony!"

The key to having such a conversation is walking all your show units and using your Feature/Benefit Worksheet. Know your product. Then you can create a desire.

WHEN THE PROSPECT DOES NOT QUALIFY

If the prospect does not meet the standards set by your property, it is important that you clearly explain the reasons. Consistency is required by law, but it is also required that you be specific. Learn your rental qualification guidelines and pet policies.

If the prospect has a pet that does not meet your standards, or if there are more occupants than allowed by your occupancy guidelines, you should inform the prospect that he or she does not qualify at the present time due to that particular reason.
It is always a good idea to close on a positive note. You might say something like, "Mr. Smith, if for any reason your situation changes, I hope you will call us again." Remember, always be consistent. If you say this to one prospect who does not qualify, you **must** say it to everyone who does not qualify.

**MAKE AN APPOINTMENT**

When you have qualified a prospect, determined his or her needs and have created a desire by vividly describing the apartment, you must close the telephone call by making an appointment. Standard closing skills typically result in a 50% conversion of calls to traffic. This should be helpful as you evaluate your progress.

Offer the prospect a choice of day and time, rather than just asking when he or she wants to visit the property. Say something such as,

"Would this afternoon at 3:00 be a good time for you?"

Often the prospect is reluctant to set a specific time, but usually he or she will agree to come during a time period – “between 2:00 and 5:00 this afternoon.” (Ask for the prospect’s phone number in case you need to reach prospect before the scheduled appointment.)

Make the prospect feel a sense of obligation to keep the appointment. Tell prospect you will be expecting him or her at that time, and that you look forward to meeting him or her. **Make sure you remember the appointment.** If for some reason you have to leave the office, make sure someone else knows to expect prospect and has the appropriate information.

**CLOSING THE TELEPHONE CALL**

After you have made the appointment, tell the prospect your name again. Warmly close the telephone call by expressing that you have written down the appointment and are looking forward to meeting him or her.

Ask if he or she needs directions. Begin those directions with, “Where will you be coming from?” Give the prospect step-by-step directions to the property if assistance is needed.

Immediately transfer your notes to the Welcome Card if you have not done so already. Documentation of the telephone call is extremely important.

**Remember:**

- Use the telephone cue card.
- Make an appointment.
- Give directions to your property.
- Document the telephone call.
YOUR TELEPHONE IMAGE

A telephone call is our *opportunity* to tell potential residents about our community and your telephone image is the most important factor in a prospect’s decision to visit the property. What is your telephone image? It is your voice, your attitude, what you say and what you don’t say.

GOOD TELEPHONE IMAGE = MORE TRAFFIC = MORE LEASES

DISCRIMINATION AND THE TELEPHONE

*It is unlawful to provide inaccurate information about the availability of an apartment for rent.*

A Fair Housing complaint can be filed based solely on a telephone conversation between a prospect and a site employee.

How can you protect yourself against this kind of complaint?

**DOCUMENTATION**

The Welcome Card is the ideal tool for recording all phone contact with prospects. The information recorded will show:

- The date and time of the conversation
- Prospect’s name and phone number
- Type of apartment the prospect desires
- Number of occupants
- If the prospect has a pet
- Information you provided
- The name of our employee who took the call

Is documentation enough? *No!* Consistency is the key to avoiding Fair Housing complaints based on telephone conversations.

Use the telephone cue card and welcome card as your checklist for every telephone call. Complete as much information as possible over the phone and have the information on hand when the prospect visits the property.

If the prospect refuses to give information to you over the telephone, make note of this on the welcome card.
TELEPHONE SHOPS

SunRidge takes telephone prospects and federal fair housing very seriously. As a quality control method, secret shopper reports are conducted periodically on every property. These telephone shops are recorded, scored and evaluated by an outside company. Failure to maintain a “good” average rating may result in termination. Your telephone shopping reports are filed in your personnel file at the corporate office.

Fair housing shoppers may contact the property if a fair housing complaint has been filed for your property. These telephone shops are recorded as well, but as a means to build their case.

There is a sample shopping report the Sample Forms section. If you will compare the shopping report to the telephone cue card you will see that by following the telephone cue card you will score an “excellent” rating on your telephone shops!

The key to success on the telephone is to stay consistent and follow the telephone cue card!

Review the example Telephone Shop and the Telephone Call Checklist in the Sample Forms section.
As you complete this section of the LEASING GUIDE, you will learn:

- Pleasant, warm welcomes that set the prospects at ease.
- How to get guest information.
- Questions that qualify the prospect.
- How to get identification from the prospect.
- Qualifying standards the prospect must meet.

The most important thing that ever happens is when our front door opens and a prospect walks in.

We must then respond accordingly!
GREETING THE PROSPECT

Make no mistake about it, from the time the prospect enters your property, his or her impression of the property, management company and employees depends on your response. Be confident, enthusiastic and warm. Remember: your ultimate goal is a signed lease.

The prospect has already decided to make a move. No matter what the prospect tells you, almost all prospects will make a final decision within 48 hours after meeting you.

Never ignore a prospect. Regardless of the circumstances, always acknowledge him or her. Think back to a situation where you were ignored. Can you remember feelings such as these:

- Am I in the right place?
- Are they too busy to help me?
- Am I not important?

Steps to ensure that prospects will never have these experiences in your office include the following:

- Immediately put aside anything else you are doing. If you are on the telephone or helping someone else, ask the prospect to be seated. Find someone else to assist him or her if possible. Never leave the prospect standing without a warm acknowledgement!
- Smile!
- Stand and greet.
- Introduce yourself. A sample introduction might include:

  "Hello. Welcome to (property name)! I’m (your name). Are you looking for a new home?"

The first sign that the prospect is important is when you immediately stop what you are doing. Then, your warm smile reassures the prospect and makes him or her feel welcome. By standing and coming around to meet the prospect, you remove all barriers between you and the prospect.

Federal Fair Housing Law requires you to treat every prospect the same.

*Remember:*

- The prospect will probably make a final decision within 48 hours.
- You will never get another chance to make a good first impression.
- Be warm, sincere and confident when greeting the prospect.
- Treat every prospect the same.
QUALIFYING THE PROSPECT

A Welcome Card must be completed on every prospect. The Welcome Card is designed to provide the information you will need to determine the prospect’s needs, to ensure the prospect meets our rental qualification criteria, and to serve as documentation for fair housing.

Review the Welcome Card and Rental Qualification Guidelines in the Sample Forms section.

Continuing with a sincere desire to assist the prospect, do not interrogate the prospect. Explain that before you can help him or her, you will need some information:

“If you don’t mind, I need to get some information so that I can find just the right apartment for you.”

If a prospect opposes giving you the required information, politely explain that company policy requires this for every person wishing to tour the community. Also explain the importance of the information in determining their specific needs.

Important information you need to know includes the following:

- The prospect’s contact information. This is important for follow up and to be able to contact the prospect if your apartment availability changes.

- Where the prospect is currently living. This can tell you if the prospect is upgrading or downsizing, which is important information in apartment selection. It is also helpful here to ask why he or she is moving. If your prospect is moving for maintenance reasons, for example, this is a great time to brag on your exceptional maintenance team! (This may also give you an important tool to market to the competition.)

- When the prospect will need the apartment. This enables you to select the right apartment for the prospect – either a vacant unit or one that is “on notice.” Remind the prospect to give notice where he or she lives now if necessary.

- The prospect’s price range. Many properties have numerous floor plans in the same apartment size. Knowing a range of what your prospect is comfortable with can tell you which apartments to add to or eliminate from his or her search.

- Ask how many people will occupy the apartment. You must understand your property’s occupancy guidelines. The prospect must meet these guidelines before you can continue with the leasing process. (Review your property’s Rental Qualification Criteria. A sample is in the Sample Forms section.)

- Determine if the prospect has pets. SunRidge only accepts dogs, cats, birds and fish. We also have a restricted breed list for dogs and certain properties have additional qualifications for pets. If your prospect has pets, make sure they meet your property’s pet policy requirements. (SunRidge’s Restricted Breed’s List for dogs is in the Sample Forms section.)

- Determine that the prospect is 18 years of age or older. Anyone under 18 can be listed as an occupant but not sign the lease.

- When determining the apartment size you must check your current availability and the prospect’s occupancy needs. If needed, counsel the resident on why he or she cannot lease a particular unit. For example, a family of 4 cannot live in a 1 bedroom apartment because the maximum occupancy limits are defined as two (2) people per bedroom plus one (1) additional person in the apartment. Persons are counted as occupants at birth.
• Make sure you know everything the prospect wants in the apartment including specific location, floor preference, color scheme, etc. When you know this in the beginning of the leasing process you will be able to quickly select the apartment(s) that most closely meet the prospect’s needs.

• When making comments, be careful not to state anything that can violate Fair Housing law.

**Fair Housing Notes:**

• Greet *every* prospect in the same manner.

• Complete Guest Information on *every* prospect.

• Ask *every* prospect the same qualifying questions.
THE WELCOME CARD PROCESS

It is a good idea to clip the Welcome Card on the front of your Leasing Notebook while touring the property. This makes it easy for you to use this information while with the prospect. In addition, you can make note of your conversation with the prospect.

The best method for closing the lease is to know exactly what the prospect wants. This form is your best tool for remembering what is really important to the prospect.

If the prospect does not lease on the first visit, maintain an active copy for the Welcome Card file. This file, located in your Leasing Follow-Up Box, will prove invaluable to you. Check these files on a daily basis and follow up. Never throw them away. If the prospect leases elsewhere, transfer the Welcome Card to an inactive Welcome Card file where they are to be kept for at least 2 years – The law requires it!

Driver’s license or government issued picture identification required.

Always make the prospect feel special!

Examples of valid government issued identification:

- Driver’s license
- Government issued identification card
- Passport
- Military identification card

Check the expiration date. None of these forms of ID are acceptable if they are expired.

Review the Welcome Card in the Sample Forms section.
GREETING AND QUALIFYING

PROSPECT IDENTIFICATION

- A current government issued ID must be required from all prospects prior to leaving the office before touring the property. A current driver’s license is the most preferable form of identification.

- After qualifying your prospect and before leaving the office to tour, simply ask to see the prospects driver’s license. Check to see that:
  1. It is current.
  2. The picture matches your prospect.

  Hold the driver’s license in the top desk drawer until you return. DO NOT FORGET TO RETURN THE DRIVER’S LICENSE TO THE PROSPECT WHEN YOU RETURN!

- If a prospect questions this procedure, he or she is to be told that it is company policy and everyone who tours the community is required to do the same.

- Write the apartment number(s) you intend to show on the guest information sheet.

- Write the ID number on the Welcome Card.

- Any prospect refusing to show proper identification cannot tour the community. This must be documented on their guest information sheet.
QUALIFYING STANDARDS

- Each property must have written rental qualification guidelines framed and hung on the wall of the main leasing area.

- Rental Qualification Guidelines are designed to set standards for the consistency of qualification of applicants.

- The standards are not to be altered or changed.

- The Rental Qualification Guidelines are in compliance with the Fair Housing Amendments Act of 1988.

Review the Rental Qualification Guidelines in the Sample Forms section.
DEMONSTRATING THE APARTMENT

As you complete this section of the LEASING GUIDE, you will learn:

- The first step after qualifying the prospect.
- What to say on your way to the target unit.
- How important listening is in the leasing process.
- What to say as you open the front door of the target unit or model.
- How to show and demonstrate the target unit(s).
- How to pre-lease occupied apartments.
THE PROPERTY TOUR

After greeting and evaluating the prospect’s needs, you have the opportunity to show the property, amenities, vacant unit(s), model, and/or target unit(s). This is more than just a walk through the property. It is a sales tour, and it begins when the prospect enters the property.

Before you leave the office, demonstrate how the office area, clubroom, pool, exercise facility and other amenities can benefit them. Refer back to the Feature/Benefit selling techniques. Remember, do not sell a swimming pool, sell what having a pool means to the prospect.

When you are ready to leave the office, the following items will be of help:

- Make sure you have the correct key. (See the key check out log at the back of this section.) You should never leave the office with all the keys for a particular apartment. Take one key with you and don’t forget to check it out. Review the Key Check Out Log in the Sample Forms sections.
- Be positive that the vacancy is READY. (You should have already walked that morning.)
- Have your Leasing Notebook in hand with the Welcome Card attached.
- Know exactly where you are going.
- Choose the most attractive route to the apartment(s) you are going to show. If it is a vacant unit and you have done your homework properly, you will already know the best route. If it is the model apartment you are going to show, make sure you have selected the scenic tour.
- Continue qualifying the prospect. The more you know about the prospect, the more you will be able to help the prospect in leasing the apartment. Ask questions such as:
  1. “What would your perfect apartment look like?”
  2. “Do you work near here?”
- **Stress Value.** Point out what is included in the rental rate, such as amenities and service that provide a “hassle-free” lifestyle. Sell the prospect on why your property is the best value for the money in the area.

<table>
<thead>
<tr>
<th>NEVER-EVER:</th>
<th>INSTEAD:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Share personal problems</td>
<td>Talk positively about the prospect</td>
</tr>
<tr>
<td>Talk about property problems</td>
<td>Talk positively about the property</td>
</tr>
<tr>
<td>Use “security,” “safety,” or “police”</td>
<td>“gated community,” “light check”</td>
</tr>
<tr>
<td>Gossip about residents, employees, vendors or the competition</td>
<td>Brag on employees, residents and vendors and refrain from negative comments</td>
</tr>
<tr>
<td>Walk too fast or hurry a prospect</td>
<td>Take your time and discuss important issues</td>
</tr>
<tr>
<td>Make promises you cannot keep</td>
<td>Stick to policy and procedure</td>
</tr>
<tr>
<td>Step over a piece of trash</td>
<td>Always pick it up...it makes a good impression</td>
</tr>
<tr>
<td>Use slang or profane language</td>
<td>Keep conversation positive and upbeat</td>
</tr>
<tr>
<td>Smoke in front of a prospect</td>
<td>Smoke alone, away from traffic areas</td>
</tr>
</tbody>
</table>
THE DEMONSTRATION

After you have determined the prospect’s needs and have further qualified him or her, you now have the unique opportunity of the demonstration. You have already established yourself as a professional and, having completed the leasing process properly to this point, are in complete control of the situation and are confident your prospect has found his or her new home at your property.

As you show the apartment, always be working toward your objective: to lease the apartment to your prospect. In order to achieve your goal, follow these steps:

- **When you enter the apartment**, open the door and allow the prospect to enter first. As the prospect enters the apartment say, "Welcome home!"

- **Have a plan for showing the apartment**. Know the route you will take through the unit and where you will stand. Keeping your distance from the prospect prevents prospect from feeling cramped. Keep yourself between the prospect and the exit at all times.

- **Do not point out the obvious!** Rather than make a statement such as, “This is the living room,” or “This is our tan carpet,” make statements such as, “This is our spacious living area which can accommodate a sofa and love seat with bookshelves and an entertainment center,” or “This taupe carpet is such a neutral color that it will allow you to decorate the apartment with any color you choose.” (This is an example of Feature/Benefit selling!)

- **Get the prospect involved**. When demonstrating the kitchen or the bath areas, you might want to say something like, “if you’ll open that linen closet door, you will see how much space there is for storage,” or “Why don’t you open that closet door and see how much space is available for clothing?”

  If there is a particularly interesting or scenic view from the apartment, you might step to the window and say, "Look at this great view you can have from your patio."

- **Maintain control of the demonstration**. Guide the prospects through the apartment and make sure they understand you are in control of the tour. You will be able to accomplish this with statements such as, “Walk this way. I can’t wait to show you all the space in this kitchen.”

- **Know your product**. The prospect may find objections to each floor plan. Consequently, it is your responsibility to make sure that you know each objection so that you are prepared with an answer.

By working with other Leasing Consultants at the property and defining the objections that prospects have to floor plans, you can do your homework and be prepared. Following this section is a list of objections with recommendations on how you can overcome them.

Never let an objection by a prospect be made without responding with a positive comment. This is a key issue in the leasing process.
- **Stress Value.** Continue to comment on the value the prospect will receive for the money. Point out the many features included in the rental package, e.g., color scheme, space, fireplaces, vaulted ceilings, views, washer/dryers.

  Demonstrate the features so the prospect will appreciate the value of the rental rate.

- **Know when to back off!** If you show an apartment to a couple or roommates, there may be a time when you sense they would like some time alone to discuss the apartment. This situation is quite common and often can help you close the lease.

  When you sense prospects need some time alone, you might want to comment, "Why don't I step outside for a moment to give you a chance to talk." It may be that they need to discuss finances.

  There are always things that need to be said between roommates or a couple that they do not feel comfortable saying in front of the Leasing Consultant. Give them some space and just a little time alone and then re-enter the apartment and gain control again.

**REMEMBER:**
- Always show the target or model unit.
- Never show a dirty apartment or an apartment not market ready.
- Understand the prospects objections and overcome them.
- Don’t hurry the process.
- Always use the prospect’s name.
- Ask what it will take to lease today.
- ABC – Always Be Closing.
PRE-LEASING OCCUPIED APARTMENTS

When a move-out notice is received on an apartment, that unit becomes available to pre-lease to a new resident.

While it is agreed that the prospect will always prefer to see the actual apartment he or she is going to occupy, utilizing the model for pre-leasing can be of great benefit to the Leasing Consultant. The model is going to look better than the actual occupied apartment. When you are in a pre-leasing situation, first show the target unit, then show the prospect the location of the unit that will be available, indicating the carpet colors and any other special features that might be available. Never show an occupied unit.

When you are pre-leasing a unit in this manner, always walk the prospect by the exact location of the unit available and show the area to the prospect. Just because you do not have a vacant unit to show, do not slight this prospect in any manner.

If you are pre-leasing 50% of your notices, you are doing a good job at pre-leasing.

Remember:
- Be prepared before you leave the office with the prospect.
- Plan your property tour and show each prospect the same amenities.
- Ask questions while on the tour.
- Stress value.
- Always overcome an objection.
- Show the target or model apartment.

Fair Housing Concerns:
- Be consistent; treat every prospect the same.
- If you show the target or model to one prospect, show it to every prospect.
- Be consistent in your property tour; show each prospect the same amenities.
OVERCOMING OBJECTIONS

Remember, objections are buying signals. When prospects are involved enough to state an objection, they are interested in the apartment. Your job is to overcome these objections and close the lease.

Handling objections may sound difficult, but when you know your product and have practiced your Feature/Benefit selling, you can overcome objections with ease. What follows is an easy-step method to overcoming objections.

- Hear prospect out. Listen attentively when he or she is objecting.
- Repeat prospect’s objection to ensure you are clear about what you heard. This is also a great leasing tool as the objection may sound trivial when the prospect hears it from you.
- Confirm this as the reason for not leasing the apartment. A sample conversation might be, "So Diana, you would lease this apartment except you think the bedroom is too small and won’t accommodate your queen-sized bed.”
- Ask for additional objections while in this conversation. Add, "Are there any other concerns you have?"

NOW, THINK WHERE YOU ARE...

You have everything in the open. There are no hidden objections, and you know exactly why they have not leased the apartment yet. By asking direct questions, you have the answers you need to close the lease. Once you overcome their objection, the lease is yours!

Following you will find recommendations on handling some common objections, but there is no better way to overcome objections than to prepare. With either your Manager or another Leasing Consultant, examine each vacancy. Prepare for the prospect’s objections.

Common objections include:

- Objection to Price
  To overcome this objection, you must know your market. Explain to the prospect how you compare with other properties and what is included in your price. Sell the value of your price with a list, such as amenities, location, product quality, maintenance, management, extra services, washer/dryer rentals.

- Objection to Location
  Overcoming this objection requires selling the neighborhood where your property is located or knowing quick access routes to nearby employment, shopping, schools, etc. If you will study your city and community, it will be easy to demonstrate how convenient your location is. If you are in a congested area surrounded by commercial buildings and shopping centers, sell “convenient location.” If you are in a remote setting, sell “peace and quiet.” It simply requires homework on your part.
• **Objection to Apartment Size**

Rooms look smaller when they're empty. If your prospect feels the rooms are too small, you have a chance to show off your expertise and sound like a polished professional. Know each floor plan in detail and what furniture will fit each room. Keep a tape measure with the Leasing Notebook and know the dimensions for sofas, chairs, bed sizes, dressers, etc. You can find these dimensions in most catalogs. Demonstrate how various pieces can be arranged.

• **Preference Objections**

Each individual has their own preferences. You may hear the prospect say, “*I don’t like having the dining and living room combined.*” Others may tell you, “*I would prefer the living and dining room be combined.*” These statements are the prospect’s preferences.

Suggestions for handling preference objections are as follows:

**Objection:** Combination living/dining room

**Comments:**
- The open space will make the room appear larger.
- Furniture arranging is easier.
- You can always add a room divider by using a screen or bookshelves.

**Objection:** Prefers upstairs apartment and one is not available

**Comments:**
- Always check your notices to see if that particular unit is coming available. The prospect may be able to rearrange his or her move-in date so that you would have an upstairs apartment for prospect.
- Cite easy access, especially when carrying packages or grocery bags in downstairs location.
- Cite utility savings in downstairs location.

**Objection:** No window in the kitchen

**Comments:**
- Stress privacy.
- Cite other amenities of the apartment such as walk-in closets and ample storage.
- Point out light from nearest window.

**Objection:** Apartment is too small

**Comments:**
- Cite space utilization.
- Cite savings on utilities.
- Cite reduced cleaning time.

Note: Market research tells us that size is not as important as quality.
**Objection:** Does not like color scheme

**Comments:**
- Encourage prospect to add minor accessories to his or her furnishings so that the colors would adapt with the color scheme of the present unit. A comment such as, "Wouldn't it be a pleasant change from what you had in the past?"
- If approved by management, alternative decorating such as an accent wall could be offered.
- Remind prospect of the other amenities of the apartment he or she likes.

**Objection:** No washer/dryer connection

**Comments:**
- Saves money on utility bills.
- Saves you time – you can do all of your laundry at one time in the laundry room.
- Point out the location of laundry facilities.

**Objection:** Apartment is on upper floor, lower level requested

**Comments:**
- There is more privacy.
- There is less noise without someone living directly above you.
- There is an attractive view overlooking the property.

**Objection:** No linen closet in bathroom

**Comments:**
- Cite a closet in the hall that could be used for the same purpose.
- Comment that the space for the linen closet was used for another purpose (e.g., washer/dryer connection) because we feel he or she would enjoy that amenity.
- Always point out ample storage space available under the bathroom sink.
- Know where the prospect can purchase low-cost cabinet organizers similar to those at The Container Store.

**Remember...**

- Invite objections into your conversation and see them as “buying signals.”
- Know your product and familiarize yourself with potential objections.
- Be prepared. Do your homework.
- Know your market and how your property compares with others in price and product quality.
- Learn and sell the value of your product.
ASK QUESTIONS

Here is a simple formula for asking questions. Remember the key words which automatically result in a question, such as:

- Why?  •  Do you?
- What?  •  Don't you?
- How?  •  Will you?
- Who?  •  Have you?
- Which? •  Can you?
- Where? •  Can't you?
- When? •  Could you?
- Couldn't you?
- Are you?
- Is it?
- Does it?
- Can it?
- Would you?
- Wouldn't you?

To develop the habit of asking questions, we should consciously eliminate the use of the word “I” as much as possible and use “you” instead. For example:

Don't say                  Instead, say
I think...                Do you think...
I want to...              Do you want to...
I like to...              Would you like to...
I will                   Would you like for me to...
CLOSING AND FOLLOW UP

As you complete this section of the LEASING GUIDE, you will learn:

- The different types of effective closes.
- The closing ratio that is expected of you.
- How to follow up.
CLOSING TECHNIQUES

A key point to remember is that closing begins the moment you come in first contact with the prospect at the property. Everything you do in the leasing process leads to the close.

You may think that asking for a lease is one of the most difficult procedures involved in the leasing process. However, if you will review and practice various closing techniques, closing a lease will become a comfortable process for you. Below are some suggested techniques you may incorporate in closing the lease:

THE SUMMARY CLOSE

After you have been through the demonstration of the apartment and have noted the prospect’s comments on the Welcome Card, begin summarizing his or her comments remembering those features which the prospect especially preferred.

"I remember that you said the kitchen seemed to be the perfect size and that the color scheme would go with accessories that you have now. You really liked the split bedroom floor plan because you and your roommate would each have more privacy. The living room seems like it will fit your sofa and love seat perfectly."

By summarizing the comments made by the prospect, you are able to convince them that this is indeed, the apartment he or she needs.

Note: You must pay careful attention to the prospect’s responses while demonstrating the apartment in order to use the summary close.

You might also summarize many of the benefits this apartment offers the prospect:

- Proximity to his or her employment
- Close to prospect’s friends
- The right size
- An affordable price

THE PERSONAL INVITATION CLOSE

This technique is one that can be used on every prospect and in conjunction with other closing techniques. It basically is a sincere invitation to the prospect:

"We would really like for you to make your home here with us at (your property)."

Note: Treat all prospects the same. If you ask one prospect, ask all.

THE ASSUMPTION CLOSE

After getting positive feedback throughout the demonstration and overcoming objections, assume the prospect is going to lease.

"While you are filling out your application, I can be preparing the lease paperwork for you. Then you will be all set to move in next week."
THE WHICH CLOSE

This is an extension of the Assumption Close. By assuming they are going to lease, asking a “which” question can get a Yes or No answer.

"Which carpet selection did you prefer?"
"Which location did you like best?"
"Which floor plan would best suit your needs?"

THE URGENCY CLOSE

This is many times your most effective close. After selecting THE apartment for a prospect, stress the urgency of leasing today, or it may be leased by someone else.

"This is the only two-bedroom upstairs with the gray carpet that we have available for your move-in date. Since it suits all your needs, I know you don’t want to wait and risk the chance of someone else leasing it."

Be truthful, and this closing technique will not backfire.

THE BEN FRANKLIN CLOSE

Some prospects are very analytical and detail-minded. For these prospects, you must put things in writing. After making careful notes on the guest information sheet during the demonstration, sit down with the prospect and list all the pros and cons on a sheet of paper. The pros will always outweigh the cons, and should convince the prospect to lease.

THE “YES” CLOSE

This closing technique again begins from the minute the prospect enters the office. By asking questions that repetitively obtain a “Yes” response, the natural tendency will be for the prospect to say “Yes” when you ask for the deposit.

"Don’t you think your sofa and love seat will fit perfectly here in front of the fireplace?" Yes
"Do you like the wallpaper selections in the kitchen and bath?" Yes
"Isn’t the spacious kitchen great for cooking?" Yes
"Don’t you agree that this apartment fits all your needs?" Yes

At this point the prospect has agreed that the apartment fits all his or her needs. Get the application and a pen for the prospect and have him or her begin completing the paperwork.

DOUBLE-TEAM CLOSE

If the prospect does not lease, use teamwork and a sales manager approach to get the lease. Introduce the prospect to your Manager, and let the Manager attempt to close the lease again. If the Manager is not available, get another trained Leasing Consultant on your staff to help close.

Don’t oversell: a “yes” means start completing the paperwork!

Remember: ABC – Always Be Closing
THE FOLLOW UP

If you have made every effort to lease to the prospect and yet he or she still leaves without deciding to make your property their new home, you have not lost the lease. Follow up is the best way to continue to stay in contact with the prospect. Remember to always document every follow up in the "Follow Up" section of the Welcome Card.

FOLLOW-UP STEPS

These suggestions will assist you in following up the prospect’s visit:

- Contact the prospect by phone within 10 minutes of his or her visit. If you are too busy, make sure you do so before the end of the day. If you are unable to reach the prospect, leaving a message can still be a powerful tool. Simply explain that you enjoyed your visit and mention that if he or she thinks of questions to call you.

- Mail a postcard, note or thank you card to the prospect the same day of his or her visit.

- Place another telephone call or send an email 24-hours after the prospect’s visit, if this is in your budget. Refer questions to your supervisor.

- Any other creative follow-up you can think of should be noted on the Welcome Card also. Consider inviting prospects to a property function you’re having such as picnics, pool parties, etc.

Your goal in contacting the prospect is to:

- Let the prospect know that you are sincerely interested and genuinely want them to live at your property.

- Make an appointment for the prospect to return to see the apartment again. Encourage them to bring a friend or family member along; e.g., husband, wife, boyfriend, sister, etc.

- Offer any further assistance to help the prospect choose the right apartment. Answer any questions that the prospect may have thought about after the visit.

Remember, be courteous and always let the prospect know that you are interested. Do not be pushy and infringe on the prospect’s privacy. If the prospect asks you to stop contacting him or her make a note of this on the Welcome Card and stop contacting.

You are expected to close on 2 of every 4 prospects at the very minimum, or 50%.

Some of the most successful Leasing Consultants rely on follow up to close a lease. If the prospect does not lease on the first or second visit, opportunities still remain for you.

Utilize the Leasing Follow-Up Box. Always follow up! Should the prospect lease somewhere else, set up a tickler file so that you can contact the prospect no later than 45 days before his or her lease expires.

Ever have those “slow” days or need more traffic for a specific unit type? Your Welcome Cards, both past and current, can provide qualified traffic.
MOVE IN

As you complete this section of the LEASING GUIDE, you will learn:

- How to accept, review, and verify the Rental Application.
- How to handle application rejections.
- How to fill out and explain the Lease and lease-related forms.

NOTE: The Texas Apartment Association (TAA) paperwork is copy write protected. It is unlawful for you to make copies of income-generating TAA paperwork. Print all lease paperwork from the computer. Never make copies of lease paperwork.

You are charged “clicks” each time you print lease paperwork. DO NOT reduce the number of copies the computer prints in an effort to save money. The computer will charge you for two clicks regardless of what you type.
THE LEASING DAY

The following procedures are followed when your prospect makes a commitment to lease an apartment:

1. Give the prospect a TAA RENTAL APPLICATION and the RENTAL QUALIFICATION GUIDELINES (RQG) signature sheet. (To review a TAA Rental Application, look in the current TAA Redbook or TAA Software (Bluemoon). A sample RQG is in the Sample Forms section.) While he or she is completing the application and reading the RQG, continue with the next step.

2. Record the lease on the following:
   - Vacancy Report (Manual Properties Only) (Review the Vacancy Report in the Sample Forms section.)
   - Card Status section of the Welcome Card
   - Make-Ready Board
   - Computer

3. Pull the apartment file folder and all lease forms to prepare for the new resident:
   - Utility Verification Sheet (Review the Utility Verification Sheet in the Sample Forms section.)
   - Animal Addendum (if applicant has a pet)
   - Welcome Home Letter (Review the Welcome Home Letter in the Sample Forms section.)
   - Any “new resident” gifts your property gives
   - Change of address card (obtain from the post office)

4. Review the completed application, checking for thoroughness. **Make sure that the applicant has signed the bottom of the front page.** Falsification of any information on the rental application is grounds for rejection.

5. Turn the application over and complete the “Contemplated Lease Information” section, explaining to the applicant that these are the terms of his or her lease.

6. Read the Application Agreement with the applicant. **It is imperative that the applicant sign the bottom of the back side of the application.**
   - If the applicant states they have a pet, have the applicant complete an Animal Addendum.
   - Inform the applicant of the animal deposit and animal fees and make payment arrangements, if necessary, at the time of application.

7. Collect the check or money order for the application deposit and a separate check or money order for the non-refundable application fee and/or administrative fee. **Make sure the payments are prepared correctly and note the apartment number on the bottom of each payment.**

8. Complete the receipt portion on the back of the TAA Rental Application to account for all payments received.

9. You should now sign the application on the back in the place of the “Owner’s Representative”.

Remember: you cannot count an application as “complete” unless you have the completed signed application, the deposit check or money order AND the application fee and/or administrative fee check or money order.
10. Have the applicant sign the Rental Qualification Guidelines. Explain that these are the rental criteria all applicants must meet for approval and failure to meet these qualification criteria will result in denial and loss of the application fee. Further explain that falsification on the application will result in denial and loss of the application fee, administrative and the deposit.

11. Give the resident the Utility Verification Sheet, explaining that after he or she is approved the utilities will have to be scheduled for change into his or her name. *This must be done before the resident can receive keys to the apartment!* The Utility Verification Sheet should either be faxed to you upon completion or brought in – completed – on move-in day. Review the Utility Verification Sheet in the Sample Forms section.

12. A move-in appointment is a date *before* the applicant’s move-in date to sign all the paperwork. Explain the importance of the move-in appointment, stating that it will take about an hour to sign everything and go over the lease.

13. Give the applicant your welcome packet (Welcome Home Letter, gifts, etc.) and thank the applicant. Answer any final questions.

14. Enter application into the computer and begin the verification process.
APPLICATION VERIFICATION

The following steps are followed when verifying an application. This process should start immediately after the applicant leaves your office. You only have 7 days to complete this process and contact the applicant with his or her approval or disapproval.

1. If your property uses a professional service to verify applications, call, email or fax the appropriate information to the service. When the application information is reported back to you, document the information on the Application Verification Worksheet. Review the Application Verification Worksheet in the Sample Forms section.
   - If your property does not use a service, verify the application yourself and record the information on the Application Verification Worksheet.

2. Complete the Resident Qualification section of the Application Verification Worksheet.

3. The Manager MUST review the application and sign off on the Application Verification Worksheet. The Manager will note approval, approval with noted conditions or rejection.
   - If the Manager approves the application, he or she will initial the Application Verification Worksheet and you will continue with the next step.
   - If the Manager approves the application with conditions, he or she will initial this statement and write the conditions in the blank.
   - If the application is rejected, follow the procedures outlined in this section under “HANDLING REJECTION.”

4. Now that the application has been approved, contact the applicant immediately, preferably by telephone.
   - If the application is approved with conditions, explain this to the applicant and make arrangements to complete the necessary requirements.
   - Complete the required “For Office Use Only” section at the bottom of the rental application. Your applicant is now your future resident!
   - Confirm the move-in appointment with your future resident.
   - Confirm the move-in date with your future resident. Explain to him or her that the move-in date cannot be changed after this point.
   - Remind your future resident to call the applicable utility companies and complete the Utility Verification Sheet. Utilities must be connected in the resident’s name before he or she can have the keys to the apartment! Have your future resident either fax the Utility Verification Sheet to you or bring it on his or her move-in appointment or move-in date.

Remember, the purpose of obtaining the verification information is to minimize the risk of undesirable or non-paying residents. ALL applicants must be qualified in the same manner. The physical appearance or “attitude” of the applicant should have no effect on the ultimate acceptance or rejection of the applicant.
AFTER THE APPLICATION APPROVAL

1. Type the lease and applicable paperwork.
   - Since the TAA Lease Addenda vary from property to property, check with your Manager to see which addenda you will print when you print the lease.

   **NOTE:** You are charged “clicks” for every page you print from your TAA software. DO NOT change the number of pages the computer prints. You will be charged the same amount of clicks even if you reduce the number of pages you print. Per TAA, the resident is entitled to receive an original of everything signed. This means both you and the resident will sign everything (except the Resident Handbook) twice. (You can make a copy of the Resident Handbook.)

2. Put the resident’s lease file together according to the Lease File Checklist. Complete and attach the Lease File Checklist. Review the Lease File Checklist in the Sample Forms section.

3. Walk the apartment, completing the Move-In Inventory and Condition form 48 hours before the resident’s move-in day.

4. Turn in any pending work or work orders immediately and follow up to ensure completion before your resident’s move in day.
   - When you walk the apartment prior to move-in day, leave a gift in the apartment for the new resident. Since these gifts vary from property to property, talk to your Manager to find out what you are to leave in the apartment.
HANDLING REJECTION

Our Rental Qualification Guidelines are objective and application approval is based strictly on these criteria. No on-site personnel has the authority to deviate from the written standards to approve or reject an application.

The Manager will scrutinize the information provided by you from verification and determine:

- If the application qualifies to the standards of the property,
- If the applicant does not qualify and must be rejected, or
- The applicant may be approved providing the applicant can supply additional information or can clear questionable history.

If the application is rejected:

- Contact the applicant by phone and explain that the deposit will be returned within 30 days as outlined on the back of the Application Agreement. The application fee is non-refundable.
- If the applicant cannot be contacted by phone, a letter must be mailed to the applicant’s last known address. In either case, the notification procedure must be indicated on the reverse of the application.
- All rejected applications must be filed alphabetically in a special section of the “inactive” files marked CANCELLATIONS/REJECTIONS.

When informing an applicant of rejection, you need to simply say the following:

"You have failed to meet the qualifications as outlined in our written Rental Qualification Guidelines of the ___________ Apartments."

You do not need to repeat the derogatory information to the applicant. If your property uses a company to verify applications they will send a letter in the mail to the applicant explaining the basis for rejection. If not, you will be responsible for mailing a rejection letter to the applicant. (Use the TAA Notice That Tenancy Has Been Disapproved letter found in the TAA Redbook or TAA Software (Bluemoon).)

APPLICANT CANCELLATION

Occasionally, an applicant will make the decision to cancel his or her application. It is the policy of our company to retain the application deposit as liquidated damages as outlined in the Application Agreement, if an applicant cancels or changes his or her mind. The application fee and/or administrative fee cover the cost of processing the application and are nonrefundable. The deposit is reimbursed to us for holding the apartment vacant for a number of days and perhaps missing another leasing opportunity, as well as making an effort to begin the make-ready process.
PREPARING THE TAA LEASE CONTRACT

The following instructions were prepared for completing the Texas Apartment Association Lease Contract. Only apartment members of the Texas Apartment Association may use this form. Since the lease is a legal document, much care should be taken to assure that it will be accepted as evidence in a court of law.

Two copies of the lease and addenda will be executed. One copy is to be given to the resident and one copy is for the on-site office files.

**Paragraph 1 - Parties**

- All persons signing the lease will be listed as “Residents.” All residents signing the lease must be 18 years of age or older.
- Put the name of the apartment community in the owner’s blank. Type the resident’s apartment number and apartment address in the appropriate blanks.

**Paragraph 2 - Occupants**

- The space provided for occupants is to be used for minors and adults with special circumstances. (Get approval from your Manager before allowing adults over the age of 18 to be listed as “Occupants.”)
- Check with your Manager to determine how many days guests are allowed to stay in the apartment without our prior written approval. (This varies from property to property.)

**Paragraph 3 - Lease Term**

- The lease term is typed into paragraph 3. All leases should expire on the last day of the last month.
- The number of days required for written termination (or move-out notice) is to be typed here also. Most properties require a 30-day written notice however some require a 60-day written notice. Check with your Manager to determine the requirements for your property’s move-out notices.

**Paragraph 4 - Security Deposit**

- The amount of deposit the resident actually paid is typed into paragraph 4.
- SunRidge does not include the animal deposit in this amount, so check the appropriate box. (There is a separate Animal Addendum for pet deposits.)

**Paragraph 5 - Keys, Furniture and Affidavit of Move-Out**

- The number of keys and access devices the resident will actually receive is typed into paragraph 5.
- Check the appropriate box at the end of this paragraph pertaining to furniture.
Paragraph 6 - Rent and Charges

- Market rent (rent without discounts or concessions) must be typed into paragraph 6. If the resident is receiving discounts or concessions, those will be typed into paragraph 10, "Special Provisions." Check both boxes for rent payment and in the blank type in "rent drop" and the location.

- The computer should automatically figure the prorated rent. If not, ask your Manager to show you how to figure prorated rent manually. We require prorated rent payments for the 1st month, so check that box.

- Type in the appropriate dates and amounts for rent, late dates, late fees and returned check fees. Since these fees and dates vary from property to property you will have to check with your Manager.

- The animal fees are $100 and $10, respectively. This is the maximum amount that can be charged by law, so please do not type in larger amounts.

Paragraph 7 - Utilities

- Only check the boxes for the utilities the property pays. Since this varies from property to property you will have to check with your Manager.

- The fee for utility disconnection is $50.

Paragraph 8 - Insurance

- SunRidge does not require renter’s insurance, so check that box in paragraph 8.

Paragraph 9 - Security Devices

- In the rare occasion that a resident requests additional security devices, you will write those in at the time the lease is signed.

Paragraph 10 - Special Provisions

- If a concession is given, a sentence must be inserted into “Special Provisions” of the lease stating: If lease is breached for any reason the concession will be charged back upon move-out. This is also the section where you will type the concession, if given. Check with your Manager for any other information required in this paragraph.

Paragraph 11 - Unlawful Early Move-Out; Reletting Charge

- The reletting charge is automatically figured from the rent amount you typed into paragraph 6. That is why it is so important to type in market rent and make sure that amount is correct.

Paragraph 43 - Originals and Attachments

- Make sure all applicable addenda are checked here. Since this information varies from property to property, check with your Manager.

- Click the appropriate tabs and prepare these addenda.
- The Animal Addendum is printed with or without a pet. SunRidge has a restricted breed list for dogs so make sure the resident’s dog is not on the list. Mixed breeds go toward which breed the dog most closely resembles. We only accept dogs, cats, birds and fish.
  - If the resident does not have a pet, write on the bottom of the form: *No pet at move-in.*
  - If the resident does have a pet, explain the additional pet deposits and pet fee. Remember to collect the additional deposits and/or fees!

- The Satellite Dish or Antenna Addendum is printed with or without a satellite.
  - If the resident does not have a satellite, write on the bottom of the form: *No satellite dish at move-in.*
  - If the resident does have a satellite, explain the additional deposit and insurance requirement. Remember to collect the additional deposit!
  - The resident CANNOT install the satellite dish until we have received the deposit and proof of insurance.

- Always check the box for Apartment Rules or Community Policies. This is the Resident Handbook and every resident must receive one.

**EXPLAINING THE TAA LEASE CONTRACT**

You will have fewer misunderstandings with your residents if you and your fellow employees take the time at the move-in appointment to explain and answer questions concerning the lease agreement.

Residents need to understand precisely what they are signing. There is a lease brief script at the end of this section that you may use when explaining the lease. To review the TAA Lease Agreement, look in the current TAA Redbook or TAA Software (Bluemoon).

**Note:** Do not use white-out on the lease. If you must make a change, draw one line through the incorrect information and write in the correct information. You and the resident must initial and date the change.

**PREPARING THE TAA ANIMAL ADDENDUM**

1. A signed Pet Agreement is required for all residents, regardless if they have a pet or not. To review a Pet Agreement, look in the current TAA Redbook or TAA Software (Bluemoon).
   - If a resident does not have a pet, write *No pet at move in* at the bottom of both pages.
   - If a resident has a pet, the Pet Agreement must be completed and the pet deposit and pet fees must be paid.

2. The pet fee is nonrefundable and should be collected first should the resident request payments. The pet deposit is refundable to the resident after move-out, minus any pet damages.

3. If a disabled resident has a service animal you are still required to complete a Pet Agreement. However, *no pet deposit or pet fees are required.* The resident will be charged damages upon move-out for damages from the service animal.
PREPARING THE TAA SATELLITE ADDENDUM

1. A signed Satellite Addendum is required for all residents, regardless if they have a satellite or not. To review a Satellite Addendum, look in the current TAA Redbook or TAA Software (Bluemoon).
   - If a resident does not have a satellite, write *No satellite at move in* at the bottom of the page.
   - If a resident has a satellite, the Satellite Addendum must be completed. The additional satellite deposit must be paid and proof of insurance must be presented *before* the resident can install the satellite.
     - The additional deposit for a satellite is $500 and the additional insurance must be for a minimum of $25,000.

2. The satellite deposit is refundable, minus any damages to our building and/or apartment upon move-out.

PREPARING THE RESIDENT HANDBOOK

The Resident Handbook is our version of community policies. You will have fewer misunderstandings with your residents if you and your fellow employees take the time at the beginning of the lease process to explain and answer questions concerning our community policies.

Review the Resident Handbook in the Sample Forms section.

The Resident Handbook in the Sample Forms section is a sample only. Since the Resident Handbook varies from property to property, get a copy of your Resident Handbook from your Manager.

THE TAA MOVE-IN INVENTORY & CONDITION FORM

The Move-In Inventory & Condition Form is prepared and completed by you when conducting the final walk-through of the apartment before move-in. To review a Move-In Inventory & Condition form, look in the current TAA Redbook or TAA Software (Bluemoon).

- Leasing Consultants must walk their move-in apartment at least 48 hours before move-in.
- List pending repairs or work orders on a service request.
- Complete the Move-In Inventory & Condition Form as you walk through the apartment, noting any damages to the apartment.
- Sign the form and make a copy for the resident when you return to the office. Place both copies in the resident’s move-in file.
- Prepare work orders for any pending work in the apartment and ensure it is completed before the resident’s move-in date.
- When the resident moves in, explain you walked the apartment and found the noted items. Have the resident sign both copies.
- The resident takes the copy of the Move-In Inventory & Condition Form and has 48 hours to make additions and return the corrected copy to you. If the resident makes changes, make a copy and staple it to the form you completed.
THE TAA LEASE BRIEF

This explanation of the Texas Apartment Association Lease Contract is only a general explanation. It is your responsibility to read the lease completely. The lease is a legal and binding document. If you do not understand something or need further explanation, please ask.

Let's get started with the very top of the lease contract. This Lease Contract is only valid if filled out before January 1, 2010. This box at the top of page one gives you an “expiration date” and reinforces our requirement to use the most current forms. The heading also informs you that this is a binding contract and you should read it before you sign it.

1. **Paragraph 1 Parties**
The names of everyone who will sign the lease today are listed here. This paragraph also lists our apartment community, your apartment number and your address.

2. **Paragraph 2 Occupants**
The names of anyone who will live in the apartment but not sign the lease are listed here. This paragraph also specifies how many days guests may stay in the apartment without our prior written consent.

3. **Paragraph 3 Lease Term**
In addition to the beginning and ending dates of your lease, this paragraph specifies that the lease will automatically renew on a month-to-month basis unless either you or we give written notice to vacate. You are required to give written notice before move-out as required in this paragraph.

Please understand that if written notice is not received in the office as required, your lease will automatically renew month-to-month until you give us written notice or until you sign a renewal.

4. **Paragraph 4 Security Deposit**
This paragraph shows the amount of security deposit you paid. We do not add animal deposits here. If you have a pet, you will sign an Animal Addendum today and the animal deposit will be shown there.

5. **Paragraph 5 Keys, Furniture and Affidavit of Move-Out**
The number of apartment keys, mailbox keys and any other access devices you will receive are listed here. You will also see here if the apartment is furnished or not.

6. **Paragraph 6 Rent and Charges**
Market rent for your apartment is noted here. (If you received a rent discount that amount will be noted below in Paragraph 10 Special Provisions.)

You can either pay rent here in the office or drop your check into the night drop box located ____________. Your prorated rent amount of ____________ is due today for the remainder of this month.

Always remember that rent is due on the 1st of the month. Rent is considered late on the 2nd. We give you a grace period before late fees start until the 4th. The initial late fee is charged on the 4th and daily late fees are charged beginning on the 5th. No employee is authorized to waive late fees.

The lease also states here that cash payments are never accepted. We can also require all payments to be paid with cashier’s check or money order. We will require this if we receive 2 returned checks from you.

This paragraph also states the fees for returned checks. If you have a returned check, you will be charged the NSF fee plus the initial and daily late fees until the rent is paid.

If you have a pet you have to complete the TAA Animal Addendum. If you don’t, and we find an unauthorized pet in your apartment, you will be fined $100 initially and $10 a day until the pet is removed or you complete the Animal Addendum and pay the deposits and fees.

It is very important that you read this section carefully and understand when rent is due and our policy on rent collection and late charges.
7. **Paragraph 7 Utilities**
   We pay for all utilities checked in this paragraph. You will be responsible for any utilities NOT checked in this paragraph. We will not give you keys until we’ve verified that the utilities have been connected in your name. Did you bring your Utility Verification Sheet with you?

   You cannot allow utilities to be disconnected for non-payment or switch utilities back into the property’s name during your lease. If you do, you will have to pay the $50 fine listed in this paragraph.

8. **Paragraph 8 Insurance**
   The property owner’s insurance does not cover resident’s personal property. You should purchase renter’s insurance if you want your personal property covered by insurance. We do not require you to purchase renter’s insurance but it is highly recommended.

9. **Paragraph 9 Security Devices**
   Texas law requires that we provide specific security devices and re-key locks between move-ins. We have done so, but you are entitled to ask us to install additional security devices. We will do so, but you will have to pay for those items since we’ve provided everything we’re required to by law.

10. **Paragraph 10 Special Provisions and “What If” Clauses**
   Any special provisions that will become a part of this lease will be typed here. Read any information that has been added to this section and make sure you understand and agree with it.

11. **Paragraph 11 Early Move-Out; Reletting Charge**
   The reletting charge is the fine that you will have to pay if you default on your lease. There are 4 conditions listed here under which we will charge the reletting fee. Please read these now. This section also explains that the reletting fee is NOT a cancellation fee, and will NOT release you from your lease.

12. **Paragraph 12 Damages and Reimbursement**
   You are required to pay for any damages caused by you, your occupants or guests. You are also responsible for any fines or fees charged because of lease violations, community policy violations, improper use or improper conduct by you, your occupants or guests. This paragraph further explains that if we do not demand immediate payment at the time of the damage or incident, we can still demand payment at a later date.

13. **Paragraph 13 Contractual Lien and Property Left in an Apartment**
   If you are delinquent in paying rent, we can seize and store your property under a contractual lien.

   There are specific guidelines for when and how this happens and what you will have to do to get your property back.

   If you surrender, abandon or are evicted, we can remove and store everything remaining in the apartment or common areas. Except for animals and property removed after the death of a resident living alone, we can throw away or donate property under certain circumstances.

   You get your property back by paying all delinquent rent. We require all delinquent payments be made with cashier’s check or money order. Property not thrown away or donated must be sold, and there are specific guidelines we have to follow to do this.

14. **Paragraph 14 Failing to Pay First Month’s Rent**
   You have to pay your first month’s rent on or before the lease start date. If not, we can “accelerate” the rent, which means the rent for your entire lease will be due immediately. We can also terminate the lease and sue you for damages, future rent, reletting charges, attorney’s fees, court costs and any other lawful charges.

15. **Paragraph 15 Rent Increases and Lease Contract Changes**
   We can’t increase your rent or change your lease provisions during your lease unless you agree in writing. We can make reasonable changes to the apartment rules, allowed under paragraph 18 Community Policies and Rules.

   We have to give you written notice of rent increases or lease changes at least 5 days before you are required to give us written notice (see paragraph 3 Lease Term). In that case, unless you sign a lease renewal or give us
written notice to vacate, your lease will automatically continue on a month-to-month basis with the increased rent and lease changes.

This new, modified lease will begin on the date stated in our written notice unless either you or we give written move-out notice as explained in paragraph 37 (Move-Out Notice).

16. **Paragraph 16 Delay of Occupancy**
   If you are unable to move into your apartment because of construction, repairs, cleaning or a previous resident who did not move out on time, we aren't responsible for the delay. However, we are responsible for notifying you of the delay.

   The lease will remain in effect, but you will not be charged rent during the delay. If you provide written notice you can terminate the lease under specific circumstances. Depending on the reason for the delay, you have to provide the notice of termination within a certain timeframe. Please read this paragraph for further explanation.

17. **Paragraph 17 Disclosure Rights**
   If someone asks for information about you or your rental history for law enforcement, governmental or business purposes, we can provide it. Utility companies may also provide information to us regarding whether you have electric service. We require documentation signed by you for the release of information unless the request is from law enforcement or governmental agencies.

18. **Paragraph 18 Community Policies or Rules**
   Our community policies are considered part of the lease, and you, your occupants and all your guests must comply with these rules. We can make reasonable changes to written community rules. These changes have to be applied to all apartments and given to all residents. We cannot make changes that affect money such as rent, late charges, late dates, etc.

19. **Paragraph 19 Limitations on Conduct**
   You are responsible for keeping your apartment clean, taking out the trash at least once a week, and using passageways only for entry or exit. All common areas must be used according to community rules and posted guidelines. Other conduct guidelines address: the use of glass containers near the pool; restrictions on using candles, heaters or barbecue grills; conducting a business in the apartment; using patios, balconies and porches; and who can legally be on the property.

   Make sure you understand all the conduct guidelines.

20. **Paragraph 20 Prohibited Conduct**
   This paragraph outlines a long list of activities that you, your occupants and guests cannot engage in. You should read this carefully to be aware of activities that will be considered a lease violation.

21. **Paragraph 21 Parking**
   We have the authority to regulate parking of all types of vehicles. This paragraph defines what is meant by an "unauthorized" or "illegally parked" vehicle, and gives us the right to tow those vehicles.

22. **Paragraph 22 Release of Resident**
   You are not entitled to terminate the lease, except under the conditions outlined in the lease. This paragraph explains that school withdrawal or transfer, marriage, separation, divorce, loss of roommates, loss of employment, bad health, death or property purchase will not end the lease or your obligations under the lease.

   If you live alone and die, your family or responsible party must give a 30-day written notice, pay rent through the end of that notice, and remove all your belongings. Any charges and damages must also be paid along with any of our removal or storage costs. Fulfillment of these obligations will terminate the lease.

23. **Paragraph 23 Military Clause**
   This paragraph outlines when and how a member of the military is able to terminate the lease. Military residents must meet specific criteria and have official, permanent change-of-station orders, a deployment letter or deployment orders.
If you are a member of the military you must read this paragraph now. By signing this lease you are stating that you agree to these terms.

24. **Paragraph 24 Resident Safety and Property Loss**

We provide smoke detectors and other devices for the protection of all residents. This paragraph makes you responsible for taking care of and using these items and for making every effort to follow Paragraph 36 (Security Guidelines) on page 5 of the lease.

We must furnish smoke detectors, test them and make sure they have working batteries as of your move-in date. After you move in, it’s your responsibility to replace batteries and to immediately report any smoke detector problems to us. You are also liable if you damage or disable a smoke detector, fail to report malfunctions or any fines, loss, or damage resulting from fire, smoke or water.

You also have responsibilities during bad or freezing weather. We are not liable for personal injury or loss of personal property because of fire and smoke damage, natural forces, theft, vandalism, water damage or utility interruption except as required by law. You should get renter’s insurance to cover all losses of your personal property.

You should dial 911 immediately when any crime or emergency occurs, and then contact us. We have certain responsibilities and you have obligations to provide a report to law enforcement and a written report to us in case of an incident.

This section is also clear that we are not obligated to furnish security personnel, patrols, lighting, gates or fences, even if these items were previously provided.

25. **Paragraph 25 Conditions of the Premises and Alterations**

By signing the lease, you are accepting the apartment and all that comes with it as is, except for conditions that may affect health or safety. You are not allowed to damage the apartment or alter it in any way, unless authorized by law or by us in writing. Review the details in this paragraph so you are clear on what you can and can’t do without our permission.

The last section of paragraph 25 gives a fair housing statement. We are committed to the principles of fair housing and will make reasonable accommodations for persons with disabilities.

26. **Paragraph 26 Requests, Repairs and Malfunctions**

The lease contract requires all requests for repairs and service to be made in writing, signed by you and delivered to us.

We do allow phoned-in or personal verbal requests for repairs; however you are still responsible for making these requests in writing, especially if the maintenance request is not completed after turning in a phoned-in or personal request.

While repairs are being made, you still have to pay the full rent. The lease states that you will be in violation of the lease if you withhold rent because of pending work orders.

On the rare occasion that there is substantial damage to your apartment we will first try to transfer you to another available apartment within the community. If nothing is available then we may terminate the lease.

27. **Paragraph 27 Animals**

You are not allowed to have an animal in your apartment or on the community unless you have our written permission. If you have a pet, you will have to complete an Animal Addendum and pay an animal deposit and fee per pet.

If you violate our animal restrictions, you will have to pay charges and damages and may even be evicted. We can remove an unauthorized animal by following specific steps outlined in this lease.

We only accept dogs, cats, birds and fish. We have a restricted breed list for dogs. Mixed breed dogs are accepted based on the traits which most resemble one of the breeds. If you have a pet or are planning on getting a pet, please take care of your obligations before bringing the pet onto the property to avoid fines.
If you have a support animal we must be made aware of it. We are allowed to require written verification of the need for a support animal. We do not charge animal deposits or fees for support animals, but you are required to complete an Animal Addendum.

28. **Paragraph 28 When We May Enter**
As outlined in this lease, we are allowed to enter your apartment when you are not home. The lease spells out in detail who can enter an apartment and under what circumstances. We have to leave a written notice in a highly visible area when we enter an apartment. Our entry must be for one of the reasons specified in this paragraph. We do not have to notify you in advance when entering apartments for one of these reasons, although we make every effort to give you advance notice if we know we will need to enter. Read this paragraph now so you understand when we can enter your apartment.

29. **Paragraph 29 Multiple Residents or Occupants**
Each resident is liable for all lease contract obligations, regardless of the number of residents on the lease. That means that all residents are legally liable for rent and other charges throughout the lease term, even if one or more co-residents move out during the lease term. If any resident, guest or occupant violates the lease, it is considered to be a violation by all residents on that lease.

As you can see in the later section of this paragraph the deposit refund check will be made out to all residents and mailed to the forwarding address provided by one of the residents. If no forwarding address is provided, we will send the deposit refund check to the last known address, which is this apartment.

30. **Paragraph 30 Replacements and Subletting**
Subletting is when a resident moves out and finds someone else to live in their apartment and pay rent without signing the lease or any other paperwork. We do not allow subletting.

If multiple residents are on a lease and one resident decides to move out for any reason during their lease, we will allow resident replacement. As long as we agree in writing with the remaining resident, a replacement resident can move in. There are specific forms that both old and new residents have to complete and specific procedures to follow.

31. **Paragraph 31 Responsibilities of Owner**
This section outlines our responsibilities and what you can do if you feel we’ve violated our responsibilities. Our duties under the habitability law are listed along with requirements you must follow.

32. **Paragraph 32 Default by Resident**
A default is a breach of lease. If you default on your lease we will take specific action. You should read this carefully to understand what we consider default. The rest of this section addresses what we can do if you default. It covers eviction, acceleration of rent, holding over and other remedies available to us, including recovery of attorney’s fees from you.

We must “mitigate” our damages if you default and move out early. This means we cannot collect double rent. We have to make an effort to rent your apartment if you default.

33. **Paragraph 33 Miscellaneous**
This paragraph covers a variety of issues that could come up during your lease. It is important that you review this section. It is clear here that we do not have the authority to make verbal statements or promises. Any agreements must be in writing and signed by us and you.

This section also states that an action or omission on our part does not waive any provisions in the lease. For example, even if we respond to your verbal request for a repair, the lease still requires requests to be made in writing. Our response to the verbal request should not be considered a waiver of that rule in the future. If the property changes ownership, all leases are binding to the new owners. An invalid clause will not make the remainder of the lease invalid. We are only allowed to deactivate or remove security devices at your request under certain circumstances.

You may have rights under Texas law to terminate the lease in certain situations involving family violence or a military deployment or transfer. Please make sure you understand this information.
34. **Paragraph 34 Payments**
   When you pay money to us we will apply that money first to any unpaid balances, then to rent, regardless of how you ask us to apply it or note on your check. The exception to this is utility payments; that money must be applied to the utility. If you are late paying rent, we do not have to accept rent or any other payment after the due date.

35. **Paragraph 35 TAA Membership**
   At the time of signing this lease, we, the management company, or the locator representing the property states that we are a member in good standing of both the Texas Apartment Association and the local affiliated apartment association. If that’s not the case, you would have the option to terminate the lease and not pay any past or future rent or charges. We can still hold residents liable for property damage.

36. **Paragraph 36 Security Guidelines**
   This paragraph lists some common sense guidelines that you, your occupants and guests (including children) should follow to keep yourselves safe. Make yourself familiar with these guidelines.

37. **Paragraph 37 Move-Out Notice**
   Before you move out, you must give us written notice as described in Paragraph 3 (Lease Term). If you move out before the lease end date you are still liable for the full lease term and all the rent through the full lease term.

   When giving notice you should complete the TAA Notice to Vacate form, provided by the office. Read here for specific instructions on giving notice.

   If your move out notice does not follow the instructions in this lease, we will not approve it. We will give you a written “receipt” from the bottom of the move-out notice verifying that we received it and either approved it or not.

   If we terminate your lease, we must give you the same written notice required in paragraph 3 (Lease Term), unless you are in default.

38. **Paragraph 38 Move-Out Procedures**
   The move-out date can’t be changed unless both we and you agree in writing. You can’t move out early unless you’ve paid all rent for the entire lease term. You also agree that you won’t hold over. This means you won’t stay in the apartment past the date you’re supposed to move out.

   State law prevents you from applying any of your security deposit to rent. This means you can’t deduct the amount of the security deposit from your last month’s rent and just pay the difference.

   We are required to have the deposit refund or explanation of charges in the mail to you within 30-days of move out. The 30-day time frame for deposit refund from us will not begin until all residents, occupants and guests move out.

39. **Paragraph 39 Cleaning**
   Before you move out, you must clean the apartment thoroughly. If you don’t clean to our satisfaction, we will charge you for reasonable cleaning fees and deduct it from your security deposit. If your deposit isn’t enough to cover the charges we will send you a bill and make efforts to collect on that bill.

40. **Paragraph 40 Move-Out Inspection**
   You are encouraged to request a move-out inspection with us. This section notifies you that any estimates we give at that time are just an estimate. The manager conducts the final inspection to assess any actual charges to the security deposit.

41. **Paragraph 41 Security Deposit Deductions and Other Charges**
   This section includes a detailed list of potential security deposit deductions and other charges. You will be responsible for any charges that are applicable.
42. **Paragraph 42 Deposit Return, Surrender and Abandonment**
   When you move out, we are required to refund your deposit or send you a written description of any deductions from your deposit within 30 days. There are conditions that apply, including full payment of rent and your forwarding address. You are required to provide your forwarding address to us in writing before moving out.

   The definitions of surrender and abandonment are here. By these definitions, when an apartment has been surrendered, abandoned or you have been evicted, you no longer have any rights of occupancy. We can clean and prepare the apartment to lease to a new resident. If you leave personal property in the apartment after surrender, abandonment or eviction, we can remove the property under paragraph 13 (*Contractual Lien and Property Left in an Apartment*).

43. **Paragraph 43 Originals and Attachments**
   We will give a signed original of the lease to you. You should keep copies of all signed lease paperwork in a safe place. You will also sign a Resident Handbook. This is our version of the community policies. Listed here are additional addenda that will become part of your lease contract.

   If you used a locator to find this apartment, his or her information should be listed in the space provided.

   We and you are both legally bound by this lease contract. You are reminded that:
   - You should read the entire lease and all addenda carefully
   - You have the right to review the lease, as well as consult an attorney, before signing
   - Changes may be made to the lease only if agreed to in writing by all parties
   - You are entitled to receive a signed original of the lease after it’s completely signed; and
   - All lease documents should be kept in a safe place.

   All residents listed in paragraph 1 should sign here. It is SunRidge policy that the Manager sign the lease after reviewing it. You can pick up your copy of the lease after the Manager signs.

   The name, address and telephone number of the apartment community is here.

   This has just been an overview of the TAA Lease Contract. You are responsible for reading the lease and asking questions if something is unclear.
THE VACANCY REPORT

This report is a worksheet. It must be kept current on a daily basis on manual accounting properties only. This is not mandatory on properties with Yardi or OneSite or similar property management software, but some managers find it helpful.

List all vacant apartments under the "vacancies" side. Group apartments in numerical order by floor plan, from smallest to largest, skipping a few spaces between each floor plan for additions to the worksheet during the week. Fill in the columns as follows:

- **Unit Type:** A1, B1, etc.
- **Unit Number:** Self-Explanatory
- **Carpet Code:** Carpet Color
- **Special Features Code:** Indicate Special Features: Wood Floors, Tile, etc.
- **Date Vacated/Date Ready to Show:** Move-out date/Date make ready is complete
- **Leased This Week:** Initials of Leasing Consultant
- **Scheduled Lease Date:** Date new lease begins
- **New Residents’ Last Names:** Self-explanatory

To use this report correctly, updates must be made as they occur. Follow these instructions:

- If you receive a notice to vacate from a resident, add that unit to the “future vacancies (notices to vacate)” side.
- When a resident moves out, draw a red line through the line on the “future vacancies” side and add that unit to the bottom of the “vacancies” side.
- When a unit is leased, write the applicant’s name in the appropriate blank and highlight the line.
- When a resident moves in during the week, highlight that line.
- As work is scheduled in a vacant apartment, write the date the work is to be completed in the appropriate blank.
- As work is completed in a vacant apartment, place an “X” in the appropriate box.
- At the end of each reporting week, copy everything over to the next report except those units under “vacancies” that have moved in.

Review the Vacancy Report in the Sample Forms section.
RESIDENT’S NOTICE OF INTENT TO VACATE

When the resident declares that he or she intends to move, correct procedures should be followed to ensure good resident relations.

You should first get the resident’s lease file. Ask the resident why he or she is intending to move and see if you can keep the resident. If not, follow these steps to correctly complete and accept the “Resident’s Notice of Intent to Vacate” form. (To see an example of the current form, see the TAA Redbook.)

- Always use the TAA “Resident’s Notice of Intent to Vacate” form. This form is to be printed from the computer.
- Look at the resident’s lease expiration date to determine if the resident is giving proper written notice, i.e. 30 or 60-day notice as required by his or her lease.
  - If the resident is giving proper written notice, proceed.
  - If the resident is not giving proper written notice, show the resident his or her lease and explain the move-out notice requirements. If the resident still wants to give notice, explain to him or her that additional charges will apply, including the reletting fee and rent through the notice.
- Write in the resident’s apartment number, name of apartment community, resident’s name(s) – as listed on the lease, and the date the resident wishes to move out.
- Have the resident read the intent to vacate and complete the reasons for moving. Although this is noted as optional, make every effort to get information from the resident to write into this blank.
- Have the resident sign and complete the contact information below the signature lines. This is very important as we oftentimes have to contact a resident before he or she moves out.
- Make sure the resident completes the forwarding address section. Explain to the resident that this is where the refund check or explanation of charges will be mailed within 30 days after move out.
- You complete the “Owner’s Acknowledgement of Receiving Move-Out Notice” section.
  - Write in the apartment number, name of community and date of intended move-out.
    - If the resident is moving out after his or her lease expires you’ll have to figure prorated rent. Only count the days the resident will occupy the apartment, using market rent plus your property’s up-charge for a month-to-month lease.
    - If the resident is moving out on the day his or her lease expires he or she will not pay prorated rent and you will write “0” in that blank.
- Check the box at the bottom that most closely resembles the description of the resident’s move-out notice. You will accept the move-out notice, reject the move-out notice or need more information to determine acceptance or rejection of the move-out notice.
If you reject the move-out notice you are saying the move-out notice does not fit the criteria for the resident to move out without incurring additional charges. If this is the case, figure the remainder of rent the resident will owe in addition to the reletting fee and lease termination fee and give the resident this information.

If you acknowledge receipt of the move out notice but don’t have enough information to approve or reject it, let the resident know what additional information you need and tell the resident the move-out notice is not approved, and therefore not binding, until you have all the information.

If you accept the move-out notice, make sure the resident still has a copy of the Resident Handbook. The resident should follow the move-out cleaning instructions located at the end of the resident handbook. Make sure you have the resident’s contact information and forwarding address.

Date and sign this portion, make a copy for our files and tear the bottom portion off for the resident to keep. Both the top original half and the copied page are kept in the resident’s file.

Record the receipt of the notice to vacate on the vacancy report and place the resident file in the appropriate place (Assistant Manager’s office, Manager’s office, in the computer, etc.) according to your office’s notice to vacate procedures. This is important so we can record the move-out notice and begin efforts to pre-lease the apartment.

THE SERVICEMEMBERS CIVIL RELIEF ACT (SCRA)

Read the article in the TAA Redbook or TAA Software (Bluemoon). entitled “Everything You Need to Know About the TAA Military Release Clause, the U.S. Service members Civil Relief Act, and Texas Law Affecting U.S. Service Members.” This article explains the impact of state and federal laws concerning military service members and their effect on your job.

According to the “Military Personnel Clause” of the lease, service members can terminate the lease if:

- They enlist or are drafted or
- They are called to active duty for more than 30 days and
- They receive orders for permanent change-of-station, deployment or released from active duty.

The service members are required to give a full 30 day notice to vacate from the 1st of the next monthly rental due date and provide a copy of their orders and we are allowed to review those orders before accepting their notice to vacate, according to the “Military Personnel Clause” of the lease contract.

Since there may be extenuating circumstances, please consult your Manager if a service member wants to terminate his or her lease early.
TELEPHONE REPORT

It is critically important for Fair Housing compliance and documentation that all prospect telephone calls are logged.

The best way to do this is by using the Welcome Card to record telephone calls. As you are asking the questions from the telephone cue card, record the information on the Welcome Card. This becomes a valuable customer service tool also, as you are not going to have to ask the same questions again when the prospect arrives to tour the community.

- When you are finished with the telephone call as dictated by the telephone cue card, complete the “Card Status” section of the Welcome Card.

- As you complete follow-up efforts, complete the “Follow-up” section of the Welcome Card.

- At the time the prospect completes an application the Welcome Card becomes part of the lease file.

After your follow up efforts are completed, file the Welcome Card in the Leasing Follow-Up Box. All Welcome Cards should be filed alphabetically behind the appropriate month tab. At the end of the year the log book is to be filed and kept for a minimum of 2 years, as required by Fair Housing law.
WORK ORDER FOLLOW-UP LOG

The Work Order Follow-up Log is an essential tool in our ongoing efforts to provide excellent customer service. This log is to be completed weekly and submitted to your AVP.

Two copies of each work order are to be printed when the work order is put into the computer. One copy is for the maintenance technician to leave in the apartment for the resident, the other is to be filed in the resident’s work order file.

A work order report is to be generated from the computer weekly. The work orders are then written on the Work Order Follow-Up Log and each resident is called.

- Introduce yourself to the resident and explain you are conducting follow up on their recent work order.
- Ask the resident if the work was completed correctly and the problem is resolved.
- Ask the resident if the maintenance technician either cleaned up after himself or scheduled cleaning.
- Write any additional comments in the blank.
- Record the date in the “follow-up date” blank and your name in the “By Whom” box.
- If the resident is not home, leave a message explaining you are calling to follow up on his or her recent work order. Ask the resident to contact the office if he or she has any comments or concerns. Make a note of this in the “Comments” section.

Review the Work Order Follow-Up Log in the Sample Forms section.
WEEKLY MARKETING LOG

Each property is required to conduct outreach marketing weekly, regardless of occupancy. If a property is trending to below 92%, those properties are required to market 3 days a week for a minimum of 2 hours each day.

When you conduct outreach marketing you must complete the Weekly Marketing Log.

- Write in the property name.
- Write in the week ending date. (SunRidge ends weeks on Wednesday and begins new weeks on Thursday.)
- As you market, complete the date, the site marketed, what you left, the person you spoke with and their phone number.
- Get a business card from each person you speak to. When you return to the office tape these business cards to a plain white piece of paper and initial the “Business Card Attached” box.
- Sign your Weekly Marketing Log and turn it into your Manager. Your Manager will sign it and forward it to your AVP on the date required by the Property Calendar.

Review the Weekly Marketing Log in the Sample Forms section.
THE MILEAGE LOG

You are reimbursed for mileage while conducting outreach marketing. Before you leave the office to market, begin the Monthly Mileage Log, when your marketing is complete finish the mileage log. This is to be turned in monthly along with commissions. You will receive a mileage check with your commission check. Your AVP compares the mileage log with the marketing log to check for discrepancies, so make sure each is accurate and correct.

Review the Mileage Log in the Sample Forms section.
SAMPLE FORMS

All forms in this manual are samples only. Please refer to the SunRidge Forms webpage or the SunRidge Resources webpage of the SunRidge website for the latest approved version of all the SunRidge forms.

DO NOT PHOTOCOPY THE FORMS IN THIS MANUAL.
APPLICATION VERIFICATION FORM

Applicant(s):
Apartment #: ___________ Rent Amount: ___________ Date: ___________
Applicant 1: ___________________________ Applicant 2: ___________________________
Applicant 3: ___________________________ Applicant 4: ___________________________
Move-In Special Quotas ___________________________
Information Verified By: ___________________________

Employment History
Employer: ___________________________ Phone: ___________________________
Verified With: ___________________________ Title: ___________________________
Hire Date: ___________ Position: ___________________________
Salary: ___________ per: ___________________________ □-Full Time □-Part Time □-Temporary

Current Rental History
□-House □-Apartment □-None - Monthly Payment/Rent: ___________
Address: ___________________________
Move-In Date: ___________ Move-Out Dates: ___________
Comments: ___________________________

Previous Rental History
□-House □-Apartment □-None - Monthly Payment/Rent: ___________
Address: ___________________________
Move-In Date: ___________ Move-Out Dates: ___________
Comments: ___________________________

Credit History
Number of Trades: ___________ Positive: ___________ Negative: ___________ Public Filings: ___________
Monthly Salary Qualifies at ___________ times the Rent. *Owes another Rental Property: □-Yes □-No
Comments: ___________________________

Criminal History
Misdemeanors: □-Yes □-No Comments: ___________________________
Felonies: □-Yes □-No Comments: ___________________________

Approval
Manager Signature: ___________________________
□-Approval □-Disapproval
Terms: ___________________________
Reason: ___________________________
Comments: ___________________________

May 2009 SR – Application Verification Form 1 of 1
DAILY CHECKLIST

Arriving At Your Community
- Flags fresh, flagpoles, light poles & signs straight
- Curbs freshly painted & free of marks
- Signage in good repair & unobstructed
- Flower beds – professional appearance; free of dead plants & trash

Product
- Make list of available product & current pricing
- Inspect ready product (take a sparkle kit)
- Open mini-models & target units prior to 9:15 a.m.
- Prospective & resident parking maintained (signs & parking lots)
- Trash removed; curbs & sidewalks swept
- Golf carts maintained, cleaned & free of trash
- Sidewalks & parking spaces in front of office – free of oil & stains with crisply painted lines
- Plant beds & flower pots – free of cigarette butts, trash & debris
- Remove cobwebs from doors and dead bugs from lights
- Signage – clean, well maintained, consistent with signage scheme
- Fresh balloons out at key locations on the community
- Front dormat vacumn (inside & outside)
- Glass & office doors sparkling
- Stock guest cards, brochures, pens, follow-up collateral & stamps
- Kitchen – clean & present refreshments attractively

Leasing Center & Business Center
- All associates "Dressed for Success"
- Name tags & ID badges required
- Clean, fresh smell
- Toilet paper & paper towels on dispensers
- Bowl & sink – clean & stain free
- Soap dispenser replenished
- Stall partitions – clean & free of graffiti
- Bathroom fans & covers – free of dirt, dust & quiet operation
- Flooring & baseboards – clean, acceptable appearance
- Lights, door locks, knobs & faucets – all functional & clean
- Trash receptacle clean

Associates
- Well organized & free of clutter
- Furniture & equipment – clean & in good repair
- Carpet – vacuumed, free of stains, wrinkles, rips or improper seams
- Clean, clean

Restrooms
- Accessible & inviting
- Padding free of water & tear (no rips)
- Equipment operable
- Clean, clean – no visible dirt or dust
- Carpet – free of stains, tears, improper seaming

Resident Business Center
- Gates & fences must close & latch properly at all times
- Pool lounges, chairs, tables & umbrellas – organized, arranged & clean
- Trash & debris removed
- Check pool deck for any trip & fall hazards
- Clarify of water – remove obvious dirt & debris
- Pool tiles – in good repair & void of residue lines
- Signage – visible & in good repair

SunRidge Representative

Date

Jan. 2010

SR – Daily Checklist

1 of 1
FAIR HOUSING COMPLIANCE CHECKLIST

1. Are the following prominently displayed in the leasing office:
   Fair Housing Poster
   YES NO
   Rental Qualification Guidelines
   YES NO

2. Have all employees signed an Acknowledgement of Non-Discriminatory Operating Policies?
   YES NO

3. Have all leasing and management employees received training in Fair Housing?
   YES NO

4. Are all telephone inquiries documented on a telephone log?
   YES NO

5. Is a guest information form used for every prospect?
   Are they all fully completed?
   Are all "not qualified" notations fully explained?
   YES NO

6. Does the Leasing Consultant complete a guest information form and have the prospect sign
   after the demonstration?
   YES NO

7. Is every effort made to avoid steering?
   YES NO

8. Is a driver’s license or government-issued ID required of every prospect before a demonstration?
   YES NO

9. If an apartment is not immediately available to suit the prospect’s needs, is each prospect
   encouraged to have his or her name added to the waiting list?
   YES NO

10. Are telephone logs, guest information forms and rejected applications filed chronologically or
    alphabetically?
    YES NO

11. Are these records kept for a minimum of 2 ½ years?
    YES NO

12. Are non-discriminatory resident qualification guidelines strictly enforced by the Manager?
    YES NO

13. Is a signed Resident Qualification Guideline sheet attached to each and every accepted and
    rejected application?
    YES NO

14. Are move-in allowances (specials) in effect at this time?
    YES NO

15. If yes, are they offered to all prospects and noted on guest information sheets?
    YES NO

16. Are occupancy standards enforced before and during the lease terms, such as at the time
    of lease renewal?
    YES NO

17. Are occupied apartments walked prior to lease renewal to see if the occupancy standard
    is being kept?
    YES NO

18. Are rents raised and renewals offered methodically by lease expiration date, unit type or
    geographic location?
    YES NO

19. Are rental increases determined by objective criteria?
    YES NO

20. Are rental discounts offered to any group of residents?
    YES NO

   If yes, what group? ________________________________

   If yes, what discount? ________________________________

21. Who determines rental rates and renewal rates for this community? ________________________________

Feb. 2009

SR – Fair Housing Compliance Checklist
<table>
<thead>
<tr>
<th>Feature</th>
<th>Benefit</th>
</tr>
</thead>
<tbody>
<tr>
<td>ENTRANCE</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>LIVING AREA</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>DINING AREA</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>BATH</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>KITCHEN</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
# KEY CHECK OUT LOG

<table>
<thead>
<tr>
<th>Date</th>
<th>Name</th>
<th>Company</th>
<th>Apt #</th>
<th>Key #</th>
<th>Check Out Time</th>
<th>Check In Time</th>
</tr>
</thead>
</table>

- Month: ____________  Year: ____________

Feb. 2007  SR – Key Check Out Log  1 of 1
**LEASE FILE CHECKLIST**

**Right Side of Lease File Folder**

- Resident’s Last Name ____________  Apt Number: ____________
- Move In Date: ____________  Apt/Unit Type: ____________

**All blanks are to be filled (Check mark or N/A).**

**File forms in this order:**

| Form Description                                                                 | Date
|----------------------------------------------------------------------------------|------
| Lease Agreement                                                                  | TAA  |
| Resident Handbook - Printed on Letter Size Paper                                  |      |
| Carport Addendum                                                                  | IF Applicable TAA |
| Garage Addendum                                                                  | IF Applicable TAA |
| Storage Addendum                                                                 | IF Applicable TAA |
| Lead Base Paint Addendum                                                          | IF Applicable TAA |
| Asbestos Addendum                                                                | IF Applicable TAA |
| Mold Addendum                                                                    | TAA  |
| Gate Addendum                                                                    | IF Applicable TAA |
| Pet Addendum - ONLY if they have a Pet                                            | IF Applicable TAA |
| Satellite Dish Addendum - Signed with or without Dish                             | TAA  |
| Washing Machine Addendum                                                          | IF Applicable TAA |
| Modification of Rights Under U.S. Service Members Civil Relief Act Addendum       | IF Applicable TAA |
| Protections of Rights Under the U.S. Service Members Civil Relief Act Addendum    | IF Applicable TAA |
| Rent Concession or Other Rent Discount Addendum                                   | TAA  |
| Remote Control, Card or Code Access Gate Addendum                                 | IF Applicable TAA |
| Intrusion Alarm Addendum                                                          | IF Applicable TAA |
| Move In / Out Condition Form                                                     | TAA  |
| Water Addendum                                                                   | TAA  |
| Electric Addendum                                                                | TAA  |
| Gas Addendum                                                                     | TAA  |
| Trash Addendum                                                                   | IF Applicable TAA |
| Application - WITH ALL Blanks Completed (Pages 1 & 2)                             | TAA  |
| Supplemental Criminal History Questionnaire for Rental Applicants, Occupants or Employees | IF Applicable TAA |
| Application Verification Sheet - Must have Manager’s Signature                   | TAA  |
| Letter of Guaranty / Co-Signer                                                  | IF Applicable TAA |
| Signed Rental Qualification Guidelines                                           | SUNRIDGE |
| Copy of Pay Check Stubs - NO COPIES on UHF Properties                             | TAA  |
| Credit Report(s) Pass or Fail Sheet Only - No Detailed Reports Allowed            | On-Site/OnSite |
| Copy of Application Fee and Deposit Money Orders                                  | TAA  |
| Quote Sheet (Showing the Private You Quote the Prospect)                          | IF Applicable OnSite |
| City of Fort Worth Tenant and Landlord Inspection                                 | IF Applicable |
| Welcome Card                                                                     | SUNRIDGE |

**Left Side of Lease File Folder**

- Conversation Log (This Should Always Stay on Top)
- Lease File Checklist

**Any other items that occur after move in are to be filed on the left hand side of the folder UNDER the Conversation Log.**

- File Organized by: ____________  Date: ____________
- File Approval by Manager: ____________  Date: ____________
- Lease Presentation by: ____________  Date: ____________

May 2010  SR - Lease File Checklist  1 of 1
# Monthly Mileage Log

**Employee:** 

**Mileage Reported Thru:**

**Property:**

**Property Number:**

---

**Note:** You can fill-in this document in Excel and it will calculate your totals. Use Tab to navigate this form.

<table>
<thead>
<tr>
<th>DATE</th>
<th>MILES-START</th>
<th>ORIGIN/DESTINATION</th>
<th>PURPOSE OF TRIP</th>
<th>MILES-END</th>
<th>MILEAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Total Mileage**

<table>
<thead>
<tr>
<th>Reimbursement Rate</th>
<th>.385</th>
</tr>
</thead>
<tbody>
<tr>
<td>TOTAL DUE EMPLOYEE</td>
<td></td>
</tr>
</tbody>
</table>

---

**Note:** This form must be attached to a Check Voucher in order for on-site employees to receive reimbursement.

**MANAGERS:** Do not use the petty cash fund to reimburse employees.

**Employee’s Signature:** ___________________________  **Date:** ___________________________

**Manager’s Signature:** ___________________________  **Date:** ___________________________

April 2008  **[ Original: Corporate - Copy: Employee - Copy: Property ]**  SR - Mileage Log
NON-DISCRIMINATORY OPERATING POLICIES ACKNOWLEDGEMENT

Federal law prohibits discrimination on the basis of race, color, national origin, sex, religion, familial status or handicap.

All personnel are expected to follow this policy in the hiring, job promotion and termination of all personnel.

Regarding the Leasing of apartments, all persons involved in the leasing process are expected to comply with federal fair housing laws, specifically understanding that discrimination based on any factor(s) in paragraph (1) above is both a violation of federal fair housing laws and company operating policies.

As an employee of SunRidge Management Group, I understand that I must not discriminate based on the above factors and will personally comply with the federal fair housing laws as stated above. Furthermore, I understand that non-compliance with federal fair housing laws will result in my immediate termination.

__________________________  ______________________
Signature                  Date

<table>
<thead>
<tr>
<th>Original: Personnel</th>
<th>Copy: Employee</th>
<th>Copy: Property</th>
</tr>
</thead>
</table>
# Property Tour Checklist

**Property Tour:**

- [ ] Date: ____________
- [ ] Times: ____________
- [ ] Leasing Associate: ____________
- [ ] Weather Condition: ____________

- [ ] Maintain Driver’s License in Office
- [ ] Have Keys that work Available
- [ ] Show and Demonstrate Property and Apartment Units Per Policy
- [ ] Point out Amenities along Property Tour Route:
  - [ ] Swimming Pool(s)
  - [ ] Clubhouse
  - [ ] Business Center
  - [ ] Clothes Care Centers
  - [ ] Fitness Center
  - [ ] Sport Court
  - [ ] Playground
- [ ] Ask Questions that draw Like/Dislike Responses from Prospects
  - [ ] Likes
  - [ ] Dislikes

- [ ] Overcome Dislikes

**Back at the Office:**

- [ ] Return Prospect’s Driver’s License
- [ ] Discuss Neighborhood Facilities
- [ ] Ask Prospect to Lease
- [ ] Ask for Deposit and Application Fee (Always ask for the money)
- [ ] After the Prospect completes the front of the Application, You complete the back of the Application. You and Applicant sign the Application.

**APPLICATION IS NOT COMPLETE UNTIL APPLICATION IS FILLED OUT AND SIGNED AND DEPOSITS AND APPLICATION FEE ARE COLLECTED.**

- [ ] If Prospect did not lease today, what is the reason?

**Follow-Up:**

- [ ] Call Prospect before you leave for the day
- [ ] Send or Email a Thank You note before you leave for the day
- [ ] Call or Email again within 48 hours
- [ ] Moved elsewhere to:
  - [ ] Not qualified because of
  - [ ] Leased
  - [ ] Apartment Number: ____________

**Comments:**

_______________________________

Feb. 2009

SR – Property Tour Checklist

1 of 1
RENTAL QUALIFICATION GUIDELINES

In an effort to promote equal treatment of all Residents and Applicants, there will be no exceptions to the following rental qualifying criteria. If you do not meet any of the selection criteria, or if you provide inaccurate or incomplete information, your application may be rejected, and your application fee will not be refunded. Your signature acknowledges that you have reviewed these rental qualification criteria.

Income Requirements
Income must be no less than three (3) times the amount of the monthly rent. If more than one applicant, the income may be combined to meet the requirement.

Credit Requirements
At least 50% of current accounts must be in good standing. No credit history will be considered good credit history. An additional deposit may be accepted. Bankruptcies that have not been discharged may result in denial.

Rental Requirements
All applicants must have six (6) months of verifiable rental history or mortgage history. An additional deposit may be accepted. Outstanding debts to landlords may result in denial. Negative rental profile may result in denial.

Employment History
All applicants must have six (6) months of verifiable employment history with current employer. All applicants must provide a copy of applicant's two (2) most recent paycheck stubs. Application may be denied if employment history is unsatisfactory. An additional deposit may be accepted.

Special Requirements
Applicants under the age of eighteen (18) will be listed as occupants only and cannot be considered Leasesmen.

Each applicant must provide government issued identification.

Statewide criminal searches will be conducted on each applicant and any occupant over the age of eighteen (18) years old.

A conviction for sexual crimes will result in denial of that applicant or occupant.

Criminal conviction history for violent crimes, crimes against persons or property, or drug-related crimes may result in denial.

Lease Guarantor
A Lease Guarantor will be allowed for first time renters, recent college graduates or renters with insufficient income.

Lease Guarantors must:
• make at least six (6) times the amount of the monthly rent and meet all qualifying criteria
• complete and sign a separate Lease Guarantor form

Occupancy Guidelines
Familial Status is defined by HUD as children under eighteen (18) years of age domiciled with parent(s) with legal custody or children domiciled with designee of the parent(s) with custody (written permission); and any person who is pregnant or in the process of attaining legal custody of a child under eighteen (18). Maximum occupancy limits are defined as two (2) people per bedroom plus one (1) additional person in the apartment. Persons are counted as occupants at birth. Maximum occupancy is as follows:

1 bedroom: 3 persons
2 bedroom: 5 persons
3 bedroom: 7 persons

Privacy Policy
The SunRidge Management Group privacy policy can be viewed at any of our property management offices, online at www.sunridge-management.com or by requesting a copy from a representative of SunRidge Management Group.

Applicant's Signature ___________________________ Date ________

Applicant's Signature ___________________________ Date ________

Applicant's Signature ___________________________ Date ________

SunRidge Representative's Signature ___________________________ Date ________
This addendum is part of the Lease Contract (“Lease”) dated ____________, between SunRidge Management Group ("Management"), as an agent for the owner, and _______________ ("Resident") for apartment number ___________ at __________________________ (“Community”):

<table>
<thead>
<tr>
<th>Address</th>
<th>City, State</th>
<th>Zip</th>
</tr>
</thead>
</table>

Resident Handbook for ____________________________ (“Community”)

The comprehensive policy for this Community is nondiscrimination on the basis of race, color, religion, sex, national origin, familial status or handicap.
The following Rules and Regulations have been established by Management and are considered an addendum to the Lease Contract. Failure to comply with Rules and Regulations may, at the discretion of Management, be grounds for termination of your Lease Contract.

**Rental Qualification Guidelines**

In an effort to promote equal treatment of all Residents and Applicants, there will be no exceptions to the following qualifying criteria. All persons applying to live at this Community must meet all the following requirements.

**Income Requirements.** Income must equal three (3) times the amount of the monthly rent. If more than one applicant, the income may be combined to meet the requirement.

**Credit Requirements.** At least 50% of current accounts must be in good standing. No credit history will be considered good credit history. Bankruptcies that have not been discharged may result in denial. An additional deposit may be required.

**Rental Requirements.** All applicants must have six (6) months of verifiable rental history or mortgage history. Outstanding debts to landlords may result in denial. Negative rental profile may result in denial. An additional deposit may be required.

**Employment History.** All applicants must have six (6) months of verifiable employment history with current employer. All applicants must provide a copy of applicant’s two (2) most recent paychecks stubs. Application may be denied if employment history is unsatisfactory.

**Special Requirements.**

- Applicants under the age of eighteen (18) will be listed as occupants only and cannot be considered Leaseholders.
- Each applicant must provide government issued identification and allow it to be photocopied.
- Statewide criminal searches will be conducted on each applicant and any occupant over the age of eighteen (18) years old.
- A felony conviction for sexual assault will result in denial of that applicant or occupant.
- Criminal conviction history for violent crimes, crimes against persons or property, or drug-related crimes may result in denial.
- Falsification of application will result in denial and forfeiture of deposits and fees.

**Lease Guarantor.**

- Make at least six (6) times the amount of the monthly rent and meet all other qualifying criteria.
- Complete and sign a separate Lease Guaranty form.

**Occupancy Guidelines.**

- Family status is defined by HUD as children under eighteen (18) years of age domiciled with parent(s) with legal custody or children domiciled with designee of the parent(s) with custody (written permission) and any person who is pregnant or in the process of attaining legal custody of a child under eighteen (18). SunRidge Management Group’s occupancy policy is two (2) people per bedroom plus one (1) additional person. Occupancy is counted at birth.

**Resident Utility Verification**

- **Electric:**
- **Gas:**
- **Water:**

- **Connection date(s):**
  - **Electric:**
  - **Gas:**
  - **Water:**

- **Utility company name(s):**
  - **Gas:**
  - **Water:**

- **Utility company account(s) or customer #:**
  - **Gas:**
  - **Water:**

- **Utility company representative’s name(s):**
  - **Gas:**
  - **Water:**

Per the Lease Contract, you may be charged for fees related to connection and meter readings of utilities, deducted from your security deposit upon move-out.

**Deposits and Fees**

- **Security Deposit:** You paid a Security Deposit in the amount of $_________.
  - **Initial & date:**

- **Application Fee:** You paid an Application Fee in the amount of $_________.
  - **Initial & date:**

- **Administration Fee:** You paid an Administration Fee in the amount of $_________.
  - **Initial & date:**
Rental Concession □ N/A

The regular monthly market rent on this apartment is in paragraph 6 RENT AND CHARGES of the lease. You acknowledge you have received a discount as follows (check applicable):

- $________ one-time concession for the month of __________.
- $________ off each month. The monthly rent will be $________ per month. (Rent only, does not include any fees, rent, etc.)

Instead of or in addition to the above you received:

The total concession is $________

(Initial & date: __________)

You agree to pay back the entire concession received if:

- You are in default of the Lease Contract for any reason.
- Proper written notice as outlined in the Lease Contract is not received by Management.

This concession is good for the initial Lease term, and may not be offered for any subsequent lease terms.

Privacy Policy

Our privacy policy can be viewed online at www.ourmanagement.com, at the property management office or by requesting a copy from a Management Company Representative.

Rent Payment & Collection Procedures

In an effort to promote equal treatment of all Residents, there will be no exceptions to the following policies.

Rent Payment. Please mail or deliver your rental payments to the Management Office or by using a personal check, cashier's check or money order. Cash is never accepted in the Management Office. If you are asked to give a cash payment or if you are told it is OK to pay by cash, please call 727-243-7648.

Definitions of dates. All dates begin at midnight following the previous day. (Example: the second [2nd] day of the month begins at midnight of the first [1st] day of the month.) Rent will be expected in the office regardless of what day of the week the due date falls on and regardless if the day is a holiday.

Rent is always due on the first (1st) day of the month. Rent is considered late on the second (2nd) day of each month. On the day of each month late fees will accrue as follows:

- Late fees of $________ will be charged on the ______ day of the month.
- Late fees of $________ per day will be added to your account beginning on the ______ day of the month. This daily late fee will continue to accrue until the balance is paid

Late fees not made in the form of a cashier's check or money order will be charged at the rate of $________ per day until the fee is paid in full. (See Eviction below.)

Washer/Dryer: Rental □ N/A

To be completed if you are renting a washer/dryer from the community.

Resident has agreed to lease a washer/dryer for use during the entire term of this Lease. Your monthly rental amount includes the rental rate of $________ per month for the washer/dryer.

(Initial & date: __________)

If Resident received a concession, washer/dryer rent is added to the rental amount after concession.

Use. Washer/dryers are to be used for the sole purpose of washing and drying your clothes. Do not use tans or dyes.

Lease term. You may not discontinue rental of the washer/dryer before the end of the Lease term under which it was leased unless with written consent from Management. If you wish to discontinue rental of the washer/dryer you may do so only at renewal. We will move and install the washer/dryer. Resident, Occupant or Guest may not remove the washer/dryer from the apartment.

Washer/Dryer: □ N/A

To be completed if you will have a washer/dryer in your apartment.

Use. Washer/dryers are to be used for the sole purpose of washing and drying your clothes. Do not use tans or dyes.

Conditions. The washing machine can cause damage to your apartment and other apartments, as well as damage to your personal property and personal property of others if it floods or leaks. For these reasons, you are automatically agreed to the
following conditions when accepting or using a washing machine in your apartment:

**Maintenance**
- You and all other Residents, Occupants and guests in your apartment must follow manufacturer’s instructions for the washer/dryer’s maintenance and use.
- **Responsibility for damage.** You agree to assume strict liability for all damage to your apartment and to neighboring apartments as well as personal property in your apartment and other apartments if:
  - the water hoses break or leak
  - the water hoses were tampered with or protective washers in the connections were removed
  - the washing machine was overloaded, causing it to malfunction
  - the washing machine leaks or malfunctions for any other reason
- Management’s insurance will not cover such damages.

**New hoses.** You should inspect the washing machine hoses and connections regularly. If you notice that hoses are in need of replacement, are corroded or cracked, you are responsible for replacement. If the washing machine belongs to the Community, you are responsible for submitting a work order to Management.

**Dryer.** You must clean the lint screen after each use. If the dryer does not dry completely, this may be an indication of problems that may increase the risk of fire. You are responsible for repairs. If the dryer belongs to the Community, you are responsible for submitting a work order to Management.

**Insurance.** It is highly recommended that you get Renters’ Insurance to cover damages to your apartment and to other apartments and to personal property in your apartment and other apartments.

**Smoke Detector**
- The Community will furnish smoke detectors as required by law. The detectors will be tested and equipped with working batteries when Resident first takes possession of the Apartment. After that:
  - Resident must pay for and replace batteries as needed.
  - We may replace dead or missing batteries at your expense, without prior notice to you.
  - Neither a resident, guest nor others may disable a smoke detector.
  - If Resident damages or disables the smoke detector or removes a battery without replacing it with a working battery, Resident will be held liable to the Community and Owners/Management under Section 20.261 of the Texas Property Code for $100 plus one month’s rent, actual damages and attorney’s fees.
- Resident completely understands and agrees with the policies regarding smoke detectors. Resident understands it is his/her responsibility to call the Management Office to place a work order asking for instructions should he/she not know how to operate the smoke detectors in the Apartment.

**Parking Facilities**
- Loitering, congregating, “tailgating” and the like are not allowed in the parking lot. Skateboarding, rollerblading, biking and the like are not allowed in the parking lot.
- **Speed Limit.** The maximum speed limit throughout the Community is ten (10) mph. Please drive carefully and watch for others.
- Abandoned or inoperable vehicles are not to be parked and/or stored in parking lots.
- The determination of whether a vehicle is abandoned or inoperable shall be within the discretion of Management, but a vehicle will be deemed to be inoperable if not “street legal”.
- Utility/recreational vehicles and trailers may only be parked in parking areas designated for such vehicles. If so designated parking for such vehicles exists at this Community then such vehicles are not allowed on the Community. Vehicles not conforming to these rules may be towed at vehicle owner’s expense.
- Assigned/reserved parking spaces are for the use of the Resident to whom the space is leased or assigned. If another vehicle parks in your reserved space, do not park in any other reserved space. Park in an unreserved space and call the Management Office.
- **Towing.** Towing is enforced if towing signs appear on the property. Any vehicle will be towed if:
  - is parked in any reserved space or blocking a reserved space such as a carport, garage, handicap or other reserved space.
  - is parked in a fire lane.
  - is parked on any area not designated for parking: grass, water runs off ditch, curb, sidewalk, etc.
  - behind another vehicle.
  - has expired tags or permits, is inoperable or has abandoned.
- Management will not be held liable for any towed vehicles or the expenses of any towed vehicles.
- Tickets are issued by law enforcement agencies.
- There is nothing the Management can do to act in the dismissal or tickets.
- **Motorcycles, mini-bikes, etc.** All city and state regulations that apply on the street will apply in the Community. All vehicles, including motorcycles and mini-bikes, must be properly licensed. No one under age is allowed to operate a motor vehicle of any type on the grounds of the Community at any time. All motorcycles and mini-bikes must be parked in the parking lot, and may not be placed in the Apartment or on the patio/balcony.

**Parking Permits**
- **All Residents on the Lease are required to have a Parking Permit on their vehicle.** The permit is to be placed inside your vehicle as instructed by Management. It must be visible. These Parking Permits are for Residents only. Management is not allowed to give anyone who is not on the Lease a Parking Permit. If the Parking Permit is not displayed properly, Management reserves the right to tow the vehicle at the vehicle owner’s expense. Please inform all visitors:
  - Reserved parking is for Residents only.
  - Visitor parking is available.
  - Violators will be towed at the vehicle owner’s expense.
- It is the responsibility of Resident to notify Management of vehicle changes. Resident must
obtain a new Parking Permit for new vehicles or additional vehicles. Old stickers must be turned in to Management before new stickers are issued and upon move out.

**Maintenance Requests**

Maintenance requests should be turned in to the Management office during business hours. In the case of an emergency, call the office. Emergencies include fire, flood, electrical shortage and sewer back ups. Maintenance requests will not be fulfilled if pets are left unattended.

**Plumbing**

A charge will be made for unplugging plumbing in cases where obstructions are caused by the introduction of improper objects such as toys, cloth, grease and other foreign objects. The cost of repair or replacement of the equipment or furnishing will be paid immediately and payable by the Resident.

**Pest Control**

Apartments are treated on a regular basis. If a problem with pests exists, notify the office. You are asked to assist pest control efforts by maintaining a high standard of good housekeeping. Residents with pet(s) are responsible for deferring charges if necessary.

**Look Outs**

If it is necessary to have authorized personnel unlock the Apartment after hours, Resident will be charged a fee of $25, payable at time of entry. This service is not available at the Community and it will be necessary to call a locksmith. Resident will be responsible for locksmith fees, payable at time of service.

**Pool Rules**

- No lifeguard is on duty. Persons using the pool facilities do so at their own risk. Management assumes no responsibility for accident or injury. Management reserves the right to suspend pool privileges if Resident and/or the guests violate the pool rules/policies.
- The pool may be used by Residents and their guests only. Pool rules and use of the pool area are subject to change.
- **Pool hours** are
  - Glass containers are allowed in the pool area.
  - No electrical equipment of any kind may be used in the pool or pool area without Management approval.
  - Alcoholic beverages are not allowed in the pool or pool area.
  - Grills are allowed in the pool area unless provided by Community.
  - Pets are not allowed in the pool or pool area.
  - Deviating from above allowed is strictly prohibited.
  - Proper swimwear attire is required when using the pool. Thongs,榕, cut-offs, jeans and sweats are not allowed in the pool.
  - No horseplay, fighting, dangerous conduct or noise which disturbs others is allowed in the pool or pool area.
  - Skateboarding, rollerblading, biking, and the like are not allowed in the pool area.
  - Residents are requested to immediately notify Management if any of the rules are violated. The residents, occupants, and their guests agree to observe all signs posted in the pool area. These rules apply to all individuals using the pool.
  - Pool maintenance. It is necessary at times to close the pool for maintenance. During this time the pool may contain hazardous levels of chemicals and will be closed. Pool gates will be locked and signage posted at all entrances. Residents or their guests may not ignore signage and enter the pool or pool area at that time. Violators will receive a written less than violation notice.
  - **Age limitations.** No persons under the age of sixteen (16) will be allowed in the pool area, unless accompanied by a parent, guardian, or adult who has been given written authority by the parent or guardian to supervise the child, and who has assumed responsibility for such supervision.
  - Persons, guardians, or custodians of persons sixteen (16) years of age or younger are totally responsible for his/her compliance of the pool rules. Residents and their guests must be especially careful in supervising and watching persons under the age of sixteen (16) in the pool area.

**Playground Rules**

- **Rules and Regulations.** Persons using the playground do so at their own risk. Management assumes no responsibility for accident or injury. Management reserves the right to suspend playground privileges if Resident, Occupant and/or their guests violate the play-
Promptly report any damaged or broken equipment to the Management Office.

Notify Management if any of the rules are violated.

Residents, Occupants, and their guests agree to observe all signs posted in the playground area. These rules apply to all individuals using the playground.

Playground maintenance. It is necessary at times to close the playground for maintenance. Residents, Occupants or their guests may not ignore signage and enter the playground at that time. Violators will receive a written lease violation notice.

Guests. No more than two (2) guests per apartment may use the playground at any time. Resident must accompany guests and be responsible for that guest at all times. It is the responsibility of the Resident to educate their guests on all playground rules and conduct.

**Clubroom** □ N/A

The clubrooms and its facilities are available for Residents only. The clubroom cannot be reserved by a Resident for functions to be given by anyone but a Resident. The Resident must be present at all times as the host or hostess of the function.

Rules and Regulations. Clubroom reservations are made through the Management Office. There is a $100 refundable rental fee and a $50 deposit to be paid when the clubroom is reserved. The damage deposit is refundable as long as all rules are followed and there are no damages.

The clubroom is available for functions after office hours only. The party must be over and cleaning complete by 11:00 pm on Sunday through Thursday or 12:00 am (midnight) on Friday and Saturday. Keys must be picked up prior to the office closing but no earlier than one (1) hour before the office closes.

Party reservations are limited to the clubrooms only and do NOT include the exterior, pool, or any other amenity area.

An adult must supervise persons under the age of eighteen (18) at all times.

Advising guests not to park in "no parking" spaces, covered parking, in front of garages, in handicap spaces, or on curbs. Violators will be issued a vehicle owner’s expenses without notice.

Resident agrees that any damages to the clubroom, contents or its facilities will be Resident’s responsibility and that Resident will pay for replacement or repair costs. If repair or replacement exceeds the clubroom deposit amount, Resident agrees to pay the excess within twenty-four (24) hours of notification. If the keys are not returned by the time we open the business day following the party there is a $100 charge to re-key. Keys may be dropped into the night drop.

Resident and guests must comply with the rules and regulations and Resident agrees that the conduct of him/herself and guests will not be disorderly, boisterous or unlawful and will not disturb the rights and comforts or conveniences of other Residents.

The clubroom is a NO-Smoking building. Smoking is only permitted in designated areas outside. Cigarette butts must be disposed of properly.

Do not move furniture without prior permission.

If noise from Resident’s party prompts a complaint, the clubroom deposit will be automatically forfeited, the party will be shut down immediately and the resident will receive a written lease violation notice.

No glass bottles are allowed!

All items in the clubhouse and kitchen (in the cabinets, refrigerator, etc) belong to Management (unless otherwise noted by Management) and are not to be disturbed or used by Resident or guests.

Management reserves the right to patrol the party at any time to observe compliance of the above policies.

**Maximum Occupancy**

The clubroom and its facilities including the parking lot must be cleaned the evening of the party. (We do not provide the cleaning tools, supplies or trash bags.)

- Floors must be swept, mopped and/or vacuumed as necessary. Do not use anything but a damp mop on the floors. No excessive water or chemicals of any kind are to be put on the floor. Charge: $20
- Couch covers and sofa cleaned. Charge: $20
- All trash containers emptied and trash disposed of in property trash receptacle. Charge: $20 per bag
- The entrance to the clubhouse, surrounding porch and parking lot areas must be free of all trash, cups, cans, cigarettes, etc. Charge: $25
- Bathroom cleaned. Charge: $25
- Stove/Microwave cleaned. Charge: $50/$25
- Other damage charges will be determined upon inspection the following morning.

**Business Center** □ N/A

Business Center use is for Residents only. Persons under the age of sixteen (16) are not allowed in the Business Center unless accompanied by an adult. Use of the computer is restricted to thirty (30) minutes maximum if someone is waiting. Nothing should be downloaded onto the computer. Personal files should be saved to a personal portable device. Do not save anything to the hard drive. No smoking, pets, food or drink is allowed in the Business Center. Management reserves the right to modify rules as necessary or close the facility if necessary. Please assist Management by reporting foul play, abuse, misuse of maintenance problems immediately.

**Fitness Center** □ N/A

Use of the Fitness Center and all equipment is at the risk of the Resident. Management will not be held responsible for any injuries that may occur in the Fitness Center. Management recommends consulting your physician before beginning any workout regimen. Persons under the age of sixteen (16) are not allowed in the Fitness Center unless accompanied by an adult. Resident is allowed one (1) guest and must accompany guest at all times. Resident assumes responsibility for guests while using the Fitness Center. No smoking pets, food or drink is allowed in the Fitness Center. Proper workout attire must be worn at all times. Damaged or malfunctioning equipment should be reported to Management.
immediately. Please assist us by wiping down
the equipment after use.

| Video/DVD Library | □ N/A |
--- | --- |

In order to check out movies from the
video/DVD library, Residents must complete a
video information sheet. Videos/DVDs must be
returned to the office within twenty-four (24)
hours. There is a late fee of $1.50 per day, per
video/DVD if it is not returned within
twenty-four (24) hours. If a video/DVD is lost or
damaged, a $25 replacement fee is charged to the
Resident who checked out the video/DVD. There is a
$1.00 rewind fee for videos. All movies must be
signed out by a Resident and a Management
Company Representative. Occupants under the
age of sixteen (16) may not check out
videos/DVDs without an adult present.

| Packages | □ N/A |
--- | --- |

Resident gives Management and any employee
of Management permission to sign for any
package addressed to Resident’s Apartment,
providing Resident is not home to receive the
package personally. Resident assumes that it is a
privilege – and not a requirement – of
Management to accept packages. Resident
understands that it is the carrier’s responsibility
to notify Resident that a package has been
delivered to the Management Office.

Management has no obligations to notify
Resident of the delivery. Resident agrees that if
there is any damage to said package upon
Resident’s receipt it Resident will not hold
Management or its employees responsible.
Management is not responsible for lost or stolen
packages. Resident agrees and understands that
only a reasonable amount of packages can be left
at the Management Office and that if packages
are not picked up in a reasonable amount of
time they will be returned to sender. Resident
has been made aware that if, at any time, any of
the above statement is disregarded Management
will no longer accept packages for Resident from
any carrier. It will then be Resident’s responsibility
to gain possession of packages elsewhere.

| Pets | □ N/A |
--- | --- |

No pets are allowed except with prior approval
and permission of Management and the
execution of a Pet Addendum. An additional pet
deposit and pet fee will be required. (The pet fee
is nonrefundable.) Please ask Management for a
copy of the restricted breed list and acceptable
pets before bringing a pet onto the community.

- Pets are not to be left unsupervised on patio
  or balcony for any period of time.
- When walking your pet, focus must be
  picked up immediately and disposed of in
  a trash receptacle.

| Disturbing Noises | |
--- | --- |

Resident’s family, guests and pets shall have due
regard for the comfort and enjoyment of all other
Residents in the Community. This Apartment is
your home, free from interruptions by
Management, unless Resident, Resident's guests
or pets disturb other Residents of the
Community. Keep outside noise down after
10pm. Televisions, stereo units, radios and
musical instruments are not to be played at such
a volume or time that will annoy persons in other
Apartments. Control of pet noise is the
responsibility of Resident.

| Terroristic Threat | |
--- | --- |

In an effort to keep our Residents fully informed,
we are providing the following information. You
may also refer to “Security Guidelines for
Residents” in your lease contract.
- Be mindful of your neighbors and your
  surroundings.
- If you notice anything unusual or suspicious,
  please contact your local FBI field office.
  www.fbi.gov/contact/trinfo.htm
- Dial 911 for clear and immediate danger.
- After first calling the F BI or police, please
  report all incidents to Management

| Alterations | |
--- | --- |

No Apartment alterations are allowed without
Management’s prior written approval.

Telephones may only be placed at previously
wired locations provided by the telephone
company. Additional drilling, cutting or boring
for wires is not permitted without written
permission from Management.

Window treatments must have white or off
white linings. Any holes made into the wall or
window frames will be charged to the
Resident upon move-out.

Locks: Adding, changing or in any way altering
locks installed on the interior or exterior doors of
your Apartment is prohibited.

| Patios/Balconies | |
--- | --- |

All patios/balconies must be kept clean and clear
of storage items. Hanging clothes, garments or
rugs over railing of patios/balconies will not be
permitted. Patios/balconies are not to be used for
anything except patio furniture. Flower pots and
plants, they are not to be used for storage under
any circumstances. Do not place plants on patio/
balcony railings. Do not leave pets unattended
for any amount of time on the patio or balcony.

Outdoor Grills. Use of a grill on the
patio/balcony is strictly prohibited by city code,
Management and the Lease Contract (see
paragraph 19, Limitations on Conduct). Grills
cannot be used within fifteen (15) feet of any
structure due to increased fire hazard.

Storage Closet. Some patios/balconies have
storage closets. Goods or materials of any kind
or description that are combustible or would
increase fire risk cannot be placed in storage
closets. Storage is any area on or at the
Resident’s risk and Management is not responsible
for any loss or damages. Testing/air conditioning
or water heater closets cannot be used for storage
purposes.

| Personal Property | |
--- | --- |

Due to legal limitations, it is not possible for
Management to insure Resident’s personal
property. It will be necessary for Resident to
obtain apartment tenant’s coverage at his or her
expense from an insurance agent to cover any
possible loss to personal property.

| Grounds Upkeep | |
--- | --- |

This Community maintains a high degree of
grounds maintenance. Management requests that
Residents help maintain these high standards.
Place all trash in the trash receptacles. Trash
may not be left outside or beside your front
or patio/balcony door. Do not dump ashes and/or
throw cigarettes butts on the grounds.
Entrances, hallways, walkways, lawns, branaeways and other public areas should not be obstructed or used for any purpose other than entering and exiting. Residents, Occupants and their guests are not allowed to litter or congregate in branaeways.

Trash Receptacles. There are trash receptacles located throughout the Community. Please insures that all trash is placed in plastic bags and securely tied before placing in the trash receptacles. Do not bag it. Trash bags may not be left outside or inside your front or patio/balcony door. Break down boxes before placing them in the trash.

Notes: Resident should not display any signs, exterior light or markings on the Apartment. Do not strach swingings or other projections to the outside of the buildings of which the Apartment is a part.

Laundry Room □ N/A
If the Community provides laundry facilities, please remove clothing from machines promptly.
Do not leave your belongings unattended at any time.
Use of Laundry Facilities shall be at Resident’s risk and Management shall not be responsible for any loss or damages. Do not use tint or dyes. Report any malfunction of machines to Management.

Resident’s Move Out Notice
We never like to see our Residents leave. However, we understand it may be necessary some time in the future. In an effort to continue our customer service efforts even as you move, we are providing a list of requirements in order to expedite your deposit refund.
- The full term of your Lease must be completed.
- Residents are required to give a (check one):
  - 30 days written notice
  - 60 days written notice
- Rent, late charges, utility bills, returned check charges (NSFs) and all other miscellaneous charges must be paid.
- The apartment must be left in good condition, normal wear and tear accepted.
- Entire Apartment is clean (see Move-out Cleaning Instructions).
- Resident is responsible for carpet shampoo upon move out.
- Resident is not responsible for carpet shampoo upon move out.
- All personal belongings are removed.
- All trash is removed and placed in the proper trash containers.
- The Move-in/Move-out Condition form, signed at move in, is signed at move out by both parties.
- All keys and other devices are returned. Rent will be charged daily until all keys are turned in to the office.

We recommend you set an inspection appointment by a Management Office Representative of your vacated Apartment. All personal items and trash must be removed before the inspection appointment.

Deposit refund. Any outstanding balances not paid prior to move out are subject to collection and may be immediately shown on your credit report. Any unpaid rent, late charges, utility bills and all other miscellaneous charges may be deducted from your security deposit(s), as well as the cost to remove trash, repair damaged items and replace missing items. Failure to complete the terms of the Lease and/or give proper written notice will result in a reduction of your deposit and other charges may be assessed and due from you. (Refer to your Lease Contract for additional information on deposit refund or forfeitures.) The Security Deposit refund or a list of charges will be mailed to the forwarding address Resident provides on the Notice To Vacate. If no address is provided, any deposit refund or charges will be mailed to your last known address, which is this community.

Move Out Cleaning Instructions
To ensure that you will not be charged fees upon move out, please use the following guidelines.

Dishwasher
- Empty dishwasher and run through one cycle (do not leave unattended).

Stove
- Lift top of stove and clean inside. Clean all drip pans.
- Clean panel, top, sides and doors.
- Clean inside of oven.
- Clean broiler pan and bottom drawer (if applicable).
- Clean vent hood, wash out filter.

Refrigerator
- Wash shelves, butter dish, drawers, doors, sides and freezer with soft cleanser.
- Empty ice trays, rinse out and place back in freezer.
- Turn dial on refrigerator and freezer to warmest setting after cleaning.

Floors, cabinets, walls, pantry, faucets, sinks, counters:
- Clean and wax all tile floors.
- Completely empty and wipe out cabinets; remove all shelf/counter paper.
- Wipe down fronts and sides of cabinets.
- Clean walls behind stove and sink with all-purpose cleanser.
- Clean out pantry and wipe down shelves.
- Faucets, sinks and all chrome must be free of lime deposits.

Carpets
- Thoroughly vacuum entire apartment.

Baseboards, windows, blinds and ceiling fans:
- Clean all baseboards.
- Clean all windows inside and outside (if possible).
- Wipe down all ceiling fan blades and light fixtures. Dust off ceiling, if needed.
- Clean all blinds.

Bathroom
- Clean vanity top, mirrors, light fixtures and medicine chest.
- Clean and disinfect tub, tub surround, walls and tiles.
- Faucet fixtures must be clean and free of lime.
- Wipe towel and shower rods clean of dust.
- Remove shelf/counter paper. Clean out linen closet and cabinets and wipe down shelves.
- Clean and wax tile floors.

Move out charges. The following is a list of some move out charges*. Prices are per item unless otherwise noted. Prices and rates are subject to change.

- Nails or hooks left in walls: $1
- Sink/tub disposal stoppers: $3
- Shelf paper removal: $10/shelf
<table>
<thead>
<tr>
<th>Service</th>
<th>Charge</th>
</tr>
</thead>
<tbody>
<tr>
<td>Light bulb replacement</td>
<td>$1.50</td>
</tr>
<tr>
<td>Fluorescent bulb replacement</td>
<td>$4.00</td>
</tr>
<tr>
<td>Outlet/switch covers</td>
<td>$1.50</td>
</tr>
<tr>
<td>Smoke detector batteries</td>
<td>$2.50</td>
</tr>
<tr>
<td>Door stopper</td>
<td>$2.50</td>
</tr>
<tr>
<td>Drop pan</td>
<td>$4.00</td>
</tr>
<tr>
<td>Mini blind</td>
<td>$20</td>
</tr>
<tr>
<td>Ceiling fan globes</td>
<td>$5.00</td>
</tr>
<tr>
<td>Trash removal</td>
<td>$10/bag</td>
</tr>
<tr>
<td>Apartment keys</td>
<td>$25</td>
</tr>
<tr>
<td>Pool key</td>
<td>$25</td>
</tr>
<tr>
<td>Mailbox key</td>
<td>$25</td>
</tr>
<tr>
<td>Other keys (exercise, sauna, etc.)</td>
<td>$25</td>
</tr>
<tr>
<td>Key cards</td>
<td>$35</td>
</tr>
<tr>
<td>Parking permit tags</td>
<td>$15</td>
</tr>
<tr>
<td>Remote access device(s)</td>
<td>$50</td>
</tr>
</tbody>
</table>

*All other charges will be cost plus 5% labor.

Approximate cleaning fees (the Manager will assess exact cleaning fees upon move out):

- 1 bedroom/1 bath $50
- 2 bedroom/1 bath $65
- 2 bedroom/2 bath $80
- 3 bedroom/2 bath $100

You may contact the Management Office and we can supply you with the names of professional cleaners who can clean for you at the prices listed above.

Don’t forget to put in a change of address with the Post Office, call the newspaper to change delivery and notify utility and other companies.

This is a legal, binding document. Please read it carefully before signing. This addendum is a part of the Lease Contract.

By signing this document I attest that I have read and understand the Resident Handbook.

<table>
<thead>
<tr>
<th>Resident</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Management</td>
<td>Date</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
RESTRICTED BREED LIST

We are not able to accommodate the following breeds of dogs:

- Akitas
- Mastiffs
- Great Danes
- Chow Chows
- Doberman Pinschers
- Miniature Pinschers
- German Shepherds
- Keeshonds
- Irish Wolf Hounds
- Wolf Hybrids
- Huskies
- Alaskan Malamutes
- Rottweilers
- Pit Bulls
- Pit Bull Terriers
SAMPLE WELCOME HOME LETTER

(Type on your property’s letterhead.)

Welcome Home!

Resident Name(s)
Property Address
City, State Zip

Dear Resident(s),

We, the team of (Property Name), as well as your neighbor’s, want to welcome you as an important part of our community. Residents like you make (Property Name) the one-of-a-kind community that it is. Decisions regarding your home and family are important. We are happy you chose (Property Name) as your home and we hope you find it to be a happy one!

It is our sincere desire that you are completely happy with your apartment and the service you receive from us. We can’t possibly know if we are exceeding your expectations without hearing directly from you. We invite you to call if you have any questions or concerns with your new home or your experience at (Property Name). We use your input to improve our service to you.

We look forward to seeing you soon. Thank you again and welcome home!

Best Regards,

Your new mailing address is: (Apartment address including apartment number)
Your scheduled move-in date is:

On your move-in date the following funds will be due:

- Pet Deposit: $__________
- Pet Fee (non-refundable): $__________
- Prorated Rent: $__________
- Other: $__________

TOTAL: $__________

Please remember to bring money orders for the above sums. Thank you for honoring our no cash policy.

SOME HELPFUL TELEPHONE NUMBERS

<table>
<thead>
<tr>
<th>Emergency</th>
<th>(Office Phone Number)</th>
</tr>
</thead>
<tbody>
<tr>
<td>After Hours Answering Service</td>
<td>(Electric Company Phone Number)</td>
</tr>
<tr>
<td>Electric Company Name</td>
<td>Telephone Company Phone Number</td>
</tr>
<tr>
<td>Telephone Company Name</td>
<td>Cable Company Phone Number</td>
</tr>
<tr>
<td>Motor Vehicle Registration</td>
<td>Local Phone Number</td>
</tr>
<tr>
<td>Texas Department of Public Safety</td>
<td>Local Phone Number</td>
</tr>
<tr>
<td>U.S. Post Office</td>
<td>(Phone Number to Closest Branch)</td>
</tr>
<tr>
<td>(Your Independent School District Name)</td>
<td>(Phone Number to Administration Office)</td>
</tr>
</tbody>
</table>

Jan. 2010

SR - Sample Welcome Home Letter 1 of 1
TELEPHONE CALL CHECKLIST

1. Do you answer the telephone promptly? 
   YES  NO
2. Were you prepared with your Leasing Notebook and guest information sheets near the telephone when you answered? 
   YES  NO
3. Was your main goal to get an appointment with the prospect? 
   YES  NO
4. Did you smile and present a business-like attitude when talking to the prospect? 
   YES  NO
5. Did you answer the telephone correctly, giving your name? 
   YES  NO
6. Did you get the prospect’s name and continue to use it during the conversation? 
   YES  NO
7. Did you ask for the prospect’s telephone number? 
   YES  NO
8. Did you find out what the prospect’s needs were? 
   YES  NO
9. Did you ask if the prospect needed directions to the property? 
   YES  NO
10. Did you create a sense of urgency to visit the property and see the apartment? 
    YES  NO
11. Did you thank the prospect for calling? 
    YES  NO
12. Did you leave the impression that you really cared about the prospect and wanted him or her to visit your property? 
    YES  NO
13. Did you find out how the prospect found out about your property? 
    YES  NO
14. Do you remember to treat each prospect the same? 
    YES  NO

Feb. 2009  
SR – Telephone Call Checklist  
1 of 1
SMILE and answer by the 2nd ring!

"Thank you for choosing Property, this is your name."

The caller will ask initial questions, typically: "How much are your apartments?" OR "Do you have any apartments?" You answer by asking:
When do you need to move? Consult your availability.

"Thanks. I want to make sure I find the perfect apartment for you so I'd like to ask you a few questions. May I get your name?"

"Thank you. Their name. How many people - total - will be living in your home? Verify apartment size with number of occupants.

"Do you have any special needs or preferences?" If yes: "What exactly are you looking for? Then narrow your search to only those apartments.

"Is there a certain price range you need to stay within?" Use fun, descriptive words to describe available floor plans for their move-in date, its amenities and the property.

"Will you be bringing a pet with you?" Verify pet type, breed and total number of pets. Refer to restricted breed list for dogs.

"How did you hear about us?" AND "Did you see our website or ads on the internet?" If internet, find out from which site.

"Do you mind if I ask why you want to move, Their name?" Create a sense of urgency; mention limited availability, high interest in a floor plan or something like location or view that makes your community desirable.

Visit with the caller and talk positively about SunRidge Management and our Certified Maintenance Team.

"I'd like to meet you, Their name, so I can show you around our community and tell you about all the exciting things happening here. When can you visit?"

"Do you work in this area? Do you know where we are located?" Offer to give directions.

"Just in case something comes up, can I get a phone number and email address where I can reach you?"

"Before we hang up, do you have any questions for me?" "Thank you, Their name, for calling. I look forward to meeting you on (verify appointment date and time.)"
TELEPHONE CUE CARD

IF YOU HAVE NOTHING AVAILABLE

SMILE and answer by the 2nd ring!
“Thank you for choosing PROPERTY, this is YOUR NAME.”

The caller will ask initial questions, typically: “How much are your apartments?” OR
“Do you have any apartments?” You answer by asking:
“When do you need to move?” Consult your availability.

“Thanks. We are not going to have anything for that time, but I want to make sure I can help you find an
apartment. I’d like to ask you a few questions and then maybe I could refer you to another property. May I
get your name?”

“Thank you, THEIR NAME. How did you hear about us?” AND “Did you see our site or ads on the
internet? If internet, find out from which site.

How many people – total – will be living in your home?”
Verify apartment size with number of occupants.

“Do you have any special needs or preferences?”
If yes: “What exactly are you looking for?”

“Is there a certain price range you need to stay within?”

“Will you be bringing a pet with you?”
Verify pet type, breed and total number of pets.

“Do you mind if I ask why you want to move, THEIR NAME?”

“It was nice visiting with you, THEIR NAME. I’m going to give you some information on some of our other
properties in this area. I’d also like to get your phone number and email address so I can let you know of
anything else I think you may like.” Take info.

If you really want to exhibit excellent customer service, tell the person you’ll make
some calls for them and find out who has availability. Then call them back.

Give a referral list. Visit with the Caller and talk positively about SunRidge Management and
our Certified Maintenance Team.

“Do you need directions to these properties?”
Give directions

“Before we hang up, do you have any questions for me?”
“Thank you, THEIR NAME, for calling. If your needs change I’d be happy to help you here.”

Email or call the referred properties to let them know this person is coming, what they are
looking for and all important information.
Limestone Canyon
Austin, TX

Telephone Professional: XXXXXX
Shopper Name Given: Dave Lowe
Authorized By: Walker, Donna
Company Name: Sunridge Management Group, Inc.

Telephone Score: 100
Special Instructions: Shop Anyone

<table>
<thead>
<tr>
<th>File</th>
<th>Date</th>
<th>Time</th>
<th>Length</th>
<th>Title/Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Download/Play Audio</td>
<td>01/29/2009</td>
<td>15:13:00 CST</td>
<td>10m 43s</td>
<td>Limestone Canyon, Austin, TX</td>
</tr>
</tbody>
</table>

Online Performance Training
None Needed.

Greeting - 24 points possible

Score: 24 | 100.0%

DID THE LEASING PROFESSIONAL:

01 Answer with the name of the community? ☑Yes ☐No 3/3
Exact greeting:
"Good afternoon, thank you for calling Limestone Canyon, this is XXXXXX. Can I help you?"

02 Identify him/herself? ☑Yes ☐No 3/3

03 Ask your name at some point in the conversation? ☑Yes ☐No 3/3

04 Effectively use your name in conversation? ☑Yes ☐No 3/3

05 Convey a warm and inviting attitude on the telephone? ☑Yes ☐No 6/6

06 Seem attentive and focused on the telephone? ☑Yes ☐No 6/6

COMMENTS:
XXXXXXX answered the phone professionally and friendly. She identified herself and the community. She was helpful and warm.

http://www.epmsonline.com/user/shopping_reports/engine/engine.plx?Key=hC/i9qcvwTM&Shop... 2/13/2009
Qualifying - 12 points possible

Score: 12 | 100.0%

DID THE LEASING PROFESSIONAL:

07 Determine any of the following? (1 point each)
   a. Apartment Size ☑Yes ☐No 1/1
   b. Move-in date ☑Yes ☐No 1/1
   c. Number of occupants, ☑Yes ☐No 1/1
   d. Price range/budget ☑Yes ☐No 1/1
   e. Pets ☑Yes ☐No 1/1
   f. Special needs or preferences ☑Yes ☐No 1/1

08 Ask why you were moving?
   ☑Yes ☐No 3/3

09 Learn how you found out about the property by asking any of the following?
   a. "How did you find out about us?" ☑Yes ☐No
   b. "How did you get our telephone number?" ☐Yes ☑No
   c. "What attracted you to our community?" ☐Yes ☑No
   d. "Did you find us on the internet?" ☐Yes ☑No
   e. Other: ☐Yes ☑No

N/A

COMMENTS:

XXXXXXX asked about apartment size, price range and move-in date. She asked about specific needs, and told me about laundry when asked. I was asked how I learned of the community. I was asked if I had any floor preference.

http://www.epinsonline.com/user/shopping_reports/engine/engine.plx?Key=hC/i9qcvwTM&Shop... 2/13/2009
Demonstrating - 12 points possible

DID THE LEASING PROFESSIONAL:

10 Describe apartment features and/or benefits, to create value? □ Yes □ No 3/3
11 Describe community features and amenities (i.e. pool, etc.)? □ Yes □ No 3/3
12 Sell the location and/or neighborhood of the community? □ Yes □ No 3/3
13 Provide information to make you interested? □ Yes □ No 3/3

COMMENTS:
XXXXXXX told me about different laundry options. She described the area well, and told me about my laundry options at the community. She successfully created interest in making a visit.

Invitation - 26 points possible

DID THE LEASING PROFESSIONAL:

14 Create a sense of urgency any of the following ways? 6/6
   a Mention a special and/or incentive that was ending soon? □ Yes □ No
   b Explain there was limited availability? □ Yes □ No
   c Create such an "excitement" that you could not wait to get there? □ Yes □ No
   d Other: □ Yes □ No

N/A

15 Extend an invitation to visit the community? □ Yes □ No 5/5
16 Try to set a specific appointment, day and time, over the telephone, using any of the following techniques? 15/15
   a "Do you want to schedule an appointment?" □ Yes □ No
   b "When would you like to come by?" □ Yes □ No
   c "Would you like to come by today or tomorrow? Morning or afternoon?" □ Yes □ No
   d Other: □ Yes □ No

N/A

COMMENTS:
XXXXXXX describe a limited time special, a very nice incentive that included a free month. She also offered an extended lease term of 18 months, and told me

http://www.epmsonline.com/user/shopping_reports/engine/engine.plx?Key=hC/i9qcwvTM&Shop... 2/13/2009
Closing - 26 points possible

DID THE LEASING PROFESSIONAL:

17. Ask for any of the following during the conversation? 10/10
   a. Your telephone number(s) (i.e. home, work, pager and/or cell) □ Yes □ No
   b. Your address or email address? □ Yes □ No

18. Offer directions or confirm the location of the community? □ Yes □ No 3/3

19. Thank you for calling? □ Yes □ No 3/3

20. Based on the leasing professional's presentation, would you have visited the community? □ Yes □ No 10/10

COMMENTS:
I was asked for my phone number. Directions to the community were not offered. XXXXX confirmed the appointment, and thanked me for calling. XXXXX's attention to my situation made me want to visit. She was a good ambassador for Limestone Canyon.

Internet

DID THE LEASING PROFESSIONAL:

21. Determine if you had Internet access? □ Yes □ No □ N/A

22. Suggest you visit the community's/company's website? □ Yes □ No □ N/A

23. If you used 'Internet' as your traffic source, did the leasing professional determine which Internet site?

COMMENTS:

XXXXXX gave me the web address for the community, and told me what to look for on the site.

Leasing Professional's Telephone Rating

<table>
<thead>
<tr>
<th>Excellent</th>
<th>Very Good</th>
<th>Good</th>
<th>Fair</th>
<th>Poor</th>
<th>Possible Score: 100</th>
</tr>
</thead>
<tbody>
<tr>
<td>100-90</td>
<td>89-80</td>
<td>79-70</td>
<td>69-60</td>
<td>59-0</td>
<td></td>
</tr>
</tbody>
</table>

http://www.epmsonline.com/user/shopping_reports/engine/engine.plx?Key=hC/i9qcwwTM&Shop... 2/13/2009
SHOPPING REPORT FOLLOW-UP FORM

Community: Limestone Canyon  Date of Evaluation: 01/26/2009
Telephone Professional: XXXXXX  Telephone Score: 100

1. What strengths are exhibited in this evaluation?

2. Which areas are in need of improvement?

3. What goals have been set to improve these areas?

4. Within what time frame are these goals to be achieved?

5. Leasing Professional's comments:

6. Did the Leasing Professional conduct appropriate follow-up with the prospect?

Is a follow-up report needed? ☐ Yes ☐ No  If yes, when?
Review completed by:  Date: 
Leasing Professional's signature:  Date: 

PLEASE RETURN THIS FORM TO YOUR REGIONAL MANAGER.

http://www.epmsonline.com/user/shopping_reports/engine/engine.plx?Key=hC/i9cvvTM&Shop...  2/13/2009
UTILITY VERIFICATION SHEET

It is the policy of Management and this Community to allow move in only after the utilities have been turned on in your name. Keys will not be issued to you until we have verified that you have changed utility billing into your name. You may contact a representative of the Management Office for utility company contact information. Please complete the following information before your move-in date and return to the office or fax to:

Utility Company Name(s):
- Electric: _____________________________
- Gas: _________________________________
- Water: ______________________________

Utility Company Account or Customer Number(s):
- Electric: _____________________________
- Gas: _________________________________
- Water: ______________________________

Connection Date(s):
- Electric: _____________________________
- Gas: _________________________________
- Water: ______________________________

Utility Company Representative’s Name(s):
- Electric: _____________________________
- Gas: _________________________________
- Water: ______________________________

Per the Lease Contract, you may be charged for fees related to connection and meter readings of utilities; these amounts will be deducted from your security deposit upon move out.

Feb. 2009

SR – Utility Verification Sheet 1 of 1
## VACANCY REPORT

**Property Name:**

**Property Number:**

**For Week Ending:**

**Prepared By:**

<table>
<thead>
<tr>
<th>Unit Type</th>
<th>Unit Number</th>
<th><em>Carpet Code</em></th>
<th><strong>Special Features Code</strong></th>
<th>Scheduled Lease Date</th>
<th>New Resident’s Last Name(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Unit Type</th>
<th>Unit Number</th>
<th><em>Carpet Code</em></th>
<th><strong>Special Features Code</strong></th>
<th>Scheduled Lease Date</th>
<th>New Resident’s Last Name(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Future Vacancies (Notices to Vacate)

<table>
<thead>
<tr>
<th>Unit Type</th>
<th>Unit Number</th>
<th><em>Carpet Code</em></th>
<th><strong>Special Features Code</strong></th>
<th>Scheduled Lease Date</th>
<th>New Resident’s Last Name(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Notes

- **Carpet Code**:
  - BG - Beige
  - BL - Blue
  - BR - Brown
  - GR - Green
  - YW - Yellow

- **Special Features Code**:
  - PP - Fireplace
  - DW - Dishwasher
  - DN - Den
  - WC - Washer/Dryer Connection
  - WD - Washer/Dryer
  - VC - Vaulted Ceiling
  - SC - Storage Closet
  - P - Furnished
  - -

**Leased This Week**
- Mark X in this column if this unit is Leased during current week (Vacancies Section)

**Pre-Leased This Week**
- Mark X in this column if this unit is Pre-Leased during current week (Future Vacancies Section)

---

*Sample*

Feb. 2009

SR - Vacancy Report

1 of 1
<table>
<thead>
<tr>
<th>Date</th>
<th>Site Marketed</th>
<th>Materials Left</th>
<th>Contact Person &amp; Phone Number</th>
<th>Business Card Attached</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Manager's Signature: ___________________________  Date: ___________________________
Employee's Signature: ___________________________  Date: ___________________________

Feb. 2009  SR - Weekly Marketing Log  1 of 1
<table>
<thead>
<tr>
<th>Property Name:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resident Name &amp; Phone Number</td>
</tr>
<tr>
<td>Unit No.</td>
</tr>
<tr>
<td>Date Written</td>
</tr>
<tr>
<td>Work Order Follow-Up Log</td>
</tr>
<tr>
<td>Problem</td>
</tr>
<tr>
<td>Completed Date</td>
</tr>
<tr>
<td>Follow-Up Date</td>
</tr>
<tr>
<td>Work O.K. By Whom</td>
</tr>
<tr>
<td>Cleaned Up After</td>
</tr>
<tr>
<td>Comments</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Name:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Date</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>1 of 1</th>
</tr>
</thead>
</table>

Sample Form: Work Order Follow-Up Log

Revised 02/09/2010

Operations Manual: Sample Forms

36 of 36