

WELCOME TO COASTAL OAK

New Owner Onboarding Checklist

This is everything we'll need from you to take your property from the first discovery call to a signed lease. Check items off as you go. Having them ready can shave days off your onboarding and get your property in front of renters sooner.

TYPICAL TIMELINE

About 1 week

YOUR ONBOARDING CONTACT

Matthew Martin, Founder

QUESTIONS

562.502.1200

1 Discovery Call and Rental Analysis

We discuss your goals and evaluate your property.

YOUR PART

- ☐ Schedule your discovery call
- ☐ Share your plans for the property, your income goals, and any concerns
- ☐ Let us know if the home is vacant or occupied

OUR PART

We pull local rental comps, so you get a realistic rent range for your area, not a guess.

2 Property Walkthrough

We visit your property and assess its rent-ready condition.

YOUR PART

- ☐ Arrange access to the property for the walkthrough

OUR PART

We look at condition, safety items, and features that affect rent, then share what's worth fixing before move-in and what can wait.

3 Property Management Agreement

We finalize the management plan for your property.

YOUR PART

- ☐ Review our services, management fees, and your responsibilities
- ☐ Sign your property management agreement
- ☐ Send proof of ownership and owner contact details
- ☐ Set up your online Rentvine owner portal for documents and financial reports

OUR PART

We walk you through everything in plain terms, so there are no surprises later. Then we set your property up in our system and set up a \$1,000 maintenance reserve so routine repairs can be handled without delay.

4 Property Intake

We gather keys and develop a make ready plan.

YOUR PART

- ☐ Keys, garage remotes, and access codes
- ☐ HOA rules and contact information, if applicable
- ☐ Utility providers and account details
- ☐ Current lease, tenant contacts, and security deposit records (for occupied homes)
- ☐ Appliance warranties, recent repair records, and insurance information

CONDITION DOCUMENTED WITHIN 1 DAY OF KEYS

OUR PART

Matthew Martin gathers everything needed to set up your property. Within 1 day of receiving keys, we document the property's condition.

If the home is occupied, we introduce ourselves to your tenants and explain how to pay rent and request repairs. Switching managers? We request files, keys, and deposit records from your previous manager for you.

5 Make Ready

We complete any work to make the property ready to market.

YOUR PART

- ☐ Review the make-ready scope and cost
- ☐ Decide which repairs move forward

OUR PART

Our vendors handle cleaning, repairs, and touch-ups so the home shows well and meets California habitability standards. We review the scope and cost with you before work begins.

6 Marketing

We strategically market your property, with regular leasing progress reports.

YOUR PART

- ☐ Watch for your regular leasing progress reports

OUR PART

Clear listing copy, quality photos, and placement on Zillow, Trulia, HotPads, Apartments.com, and Zumper. You'll see how many inquiries and showings we're getting, so you're never left wondering.

7 Applications and Leasing

We screen applicants and finalize a lease.

YOUR PART

- ☐ Watch for our update once the right resident is approved

OUR PART

Every applicant goes through the same fair, consistent screening process that follows fair housing and California tenant screening laws. We prepare the lease, collect move-in funds, and complete a documented move-in inspection.

YOU'RE LIVE

Full-Service Management

Once the lease is signed, your property moves into full-service management. Here's what we take care of from here:

- Rent collection and follow-up on late payments
 - Routine property inspections to catch small issues early
 - Tenant communication, so the late-night calls come to us
 - Maintenance coordination with trusted local vendors
 - Lease renewals and rent reviews that follow California rent rules
 - Owner reporting so you can track how your investment is doing
- ☐ Your part: check your Rentvine owner portal for documents and financial reports

Questions along the way?

We keep you updated at each step. If anything's unclear, reach out to our team.

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