

Real Estate Agent Checklist for New Tenants

By Checklister

- ☐ Tenant Personal Information
 - ☐ Full Name
 - ☐ Current Address
 - ☐ Contact Number
 - ☐ Email Address
 - ☐ Preferred Method of Contact
- ☐ Housing Requirements
 - ☐ Desired Property Type Apartment, House, Studio, etc.
 - ☐ Preferred Location/Area
 - ☐ Number of Bedrooms
 - ☐ Number of Bathrooms
 - ☐ Desired Amenities In-unit Laundry, Air Conditioning, etc.
 - ☐ Pet Requirements Pet-Friendly, No Pets, etc.
- ☐ Budget and Financing
 - ☐ Monthly Rent Budget
 - ☐ Security Deposit Budget
 - ☐ Proof of Income Pay Stubs, Bank Statements, etc.
 - ☐ Credit Score Range
- ☐ Timeline
 - ☐ Desired Move-in Date
 - ☐ Lease Length Preference 6 months, 12 months, etc.
 - ☐ Urgency of Housing Need
- ☐ Lifestyle Preferences
 - ☐ Proximity to Work/School
 - ☐ Proximity to Public Transportation
 - ☐ Preferred Neighborhood Characteristics Quiet, Urban, Family-Friendly, etc.
- ☐ Additional Requirements
 - ☐ Accessibility Needs
 - ☐ Parking Requirements On-site Parking, Street Parking, etc.
 - ☐ Storage Needs
- ☐ Documentation

- ☐ Government-issued Identification Driver's License, Passport, etc.
- ☐ Rental History
- ☐ Employment Verification Contact Information for Employer
- ☐ Agent Notes
 - ☐ Specific Client Preferences or Requests
 - ☐ Initial Impressions or Observations
 - ☐ Follow-Up Actions Planned
 - ☐ Date of Next Contact
 - ☐ Method of Next Contact
 - ☐ Specific Topics or Properties to Discuss