

# 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