

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