



*"We want to help you achieve your goals and relieve pain and uncertainty"*

## PROPOSAL AND MARKETING PLAN

PRESENTED BY: PAMELA TAEUFFER  
HEALDSBURG PROPERTY MANAGEMENT  
347 HEALDSBURG AVE., SUITE F HEALDSBURG, CA  
95448

[WWW.HEALDSBURGRENALS.COM](http://WWW.HEALDSBURGRENALS.COM); PAM@HEALDSBURGRENALS.COM

707-433-8899

## Proposal and Marketing Plan

HEALDSBURG PROPERTY MANAGEMENT is a family owned and operated business with more than twenty years experience in Sonoma County.

What is our difference?

- We inform.
- We provide educational information.
- We provide content.

Our membership in professional organizations such as the National Association of Residential Property Managers (NARPM), California Apartment Association (CAA), and the California Association of Realtors (CAR), keeps us updated and current on the many changing laws, pending legislation and the latest in the industry's marketing techniques.

*"In 1997 I opened Healdsburg Property Management with a vision: to provide excellent and high-touch service in property management to property owners with the thoughtfulness to details only a family run business can bring.*

*"Claude, my husband, and Aaron, my son, work with me on and in the business—a business that is rapidly changing on a national scale. We work hard to meet your income projections and bottom line. You are not a number with us."*

HPM is dedicated to meeting your financial and personal goals, sensitive to your concerns and pain points, and attentive to the finer details which make your rental property successful.

Our 20+ twenty years in property management and tenant placement helps us anticipate and deliver on both property owner and resident expectations. If dealing with an existing tenant we promise to be objective and provide you with fair input, even if it is hard to hear. We will apply guidelines fairly and update any needed paperwork, and in addition:

- Assess current rent;
- Assess property for maintenance/updating;
- If vacant, promote with video and Face Time;
- Develop a property owner portal on our website for accounting transparency;
- Develop a property maintenance portal on our website for online payments and maintenance;
- Existing tenant/s: Making sure all tenants are on new or current rental/lease agreements, including the latest disclosures and addendums;
- Serve proper notices as needed;
- Periodic assessments performed annually for homes and twice annually for apartments, with a professional report and photos of interior and exterior. (NOTE: We are not licensed contractors. This is a visual inspection only.)

---

### OBJECTIVE

Work to solve problems/issues that cause you stress/worry.

Address your biggest concerns to relieve any pain points.

Meet your personal and financial goals.

---

## TARGET MARKET

Historically, we've managed properties from Cloverdale to our north, the Larkfield/northern Santa Rosa area to our south, Sebastopol/Forestville to our west and Mark West to our east. Our primary focus is single family homes, duplexes, fourplexes, and small apartment buildings. We also manage vacation rentals in the wine country within thirty mile radius of Healdsburg.

We live and work in Healdsburg and are centrally located to serve each area quickly.

---

## MESSAGE SUMMARY

These detailed services are provided:

- Professional rental analysis
- Automated property showings with colorful pictures and virtual tours
- In-person showings to avoid scams and potential squatters
- Monthly "look-sees" to make sure no visible alarm bells ring in property maintenance
- A professional team who answers the phones 10 am – 4 pm Monday – Friday
- After hours/emergency service
- Licensed and insured vendors who we have worked with many years
- Professional property assessments

How do we stay updated and informed of changing laws and technology?

- HPM attends conferences yearly
- Professional membership in National Association of Residential Property Managers and California Apartment Association
- Monthly webinars
- Forms updates as soon as a legal change is made in California
- Realtor
- Member of California Association of Realtors

We manage with twenty years experience and continually infuse the business with new ideas and practices when warranted. Our family is local. Claude and Aaron were born and raised in Sonoma County and Pam has lived here since 1975. We truly mean it when we say: "We approach a plan for your property with your goals in mind. Your bottom line is ours." Every dollar we earn goes toward the business, immediate family, and a variety of charities including Redwood Empire Food Bank, Boys & Girls Club, Becoming Independent, Meals on Wheels, and others.

---

## CALL TO ACTION

Healdsburg Property Management will use all methods and available techniques to create a good working relationship with the tenant and successfully manage your property.

**WHAT IS THE DESIRED OUTCOME? A THOROUGH DISCUSSION WILL VET AND ADDRESS YOUR ISSUES OF SENSITIVITY, IF ANY.  
IN ADDITION WE PLEDGE TO:**

- Create easy and streamlined processes for property owner.
- Create easy and streamlined processes for residents, encouraging timely tenant payments and proper care of the rental property.
- Sustain viability of your investment whether maximum financial return, ultimately moving in, or eventually flipping the investment.
- Periodically analyze current agreements and disclosures for compliance with changing laws to make sure owner protected.
- Periodic assessment of property owner's goals.

---

### **PROCESS IF TENANT IN PLACE**

1. Obtain copies of rental agreements and contact information, analyze to make sure current terms are included
2. Change/modify if needed
3. Create files and appointments with residents
4. Walk through rental units
5. Report condition and suggest improvements, to owner/s if needed.
6. Complete plan of action
7. Add tenant and owner portals
8. Collect rents and remit with statements of income and expenses by 25<sup>th</sup> of every month
9. Drive by monthly and make report to owner/s of any observations of concern.

---

### **PROCESS IF TENANT NOT IN PLACE**

1. Assess property rent value with professional rental analysis;
2. Walk through and inform of perceived needs before renting;
3. Sign property management / tenant placement agreement;
4. Photograph;
5. Fun video;
6. Begin marketing immediately to 40+ partner sites;
7. Using local referrals from Real Estate Agents and other business professionals;
8. Web site: [www.HealdsburgRentals.com](http://www.HealdsburgRentals.com); [www.WineCountryLifePM.com](http://www.WineCountryLifePM.com) ;
9. Notify local and Marin County agents through networking channels;
10. List on MLS if appropriate;
11. Goes on our automatic scheduler and follow up program, applicants pre-qualified, and license provided;
12. Notify owner weekly of showing activity;
13. Review recommended applicant with property owner;
14. Draw up Lease paperwork;
15. Accept secured funds for initial monies (full month's rent + security deposit)
16. Rekey
17. Document walk through

18. Release owner disbursement.

**PROPERTY OWNER WILL BE LEFT WITH:**

1. Professional Rent Analysis
2. Sample property management agreement
3. Sample rental application
4. Sample rental agreement
5. E mail and follow up to address questions as often as you need

**BUDGET:**

- A. The normal fees to both management and place new tenants are as follows:
- B. New tenants: 50% of first full month's rent if tenant placement only.
- C. If managed 30% first full month's rent (for new tenants) + 6% of monthly rents or with our Premiere program which includes filter replacement quarterly and rent assurance protection, 8.5% monthly rent.
- D. If management contract is for three + apartment units or two + single family dwellings, Placement commission for new tenants is 25% and Management is 5% of rents and 7.5% respectively.
- E. **If monthly furnished, 10% of full month's rent for term of rental agreement.**
- F. We will handle routine maintenance and deduct from rents an amount up to \$500.

**Any maintenance issues which exceed the above amount, except for an emergency event, will be discussed with property owner and a decision of how to proceed will occur unless prior permission is expressly given. For emergencies, we have 24/7 after-hours line and vendor access. Property manager will begin repair and notify the owner contact as soon as possible.**

Organizations that are the backbone of our industry in which HPM has membership:

NORBAR = NORTH BAY ASSOCIATION OF REALTORS

CAR = CALIFORNIA ASSOCIATION OF REALTORS

NAR = NATIONAL ASSOCIATION OF REALTORS

CAA = CALIFORNIA APARTMENT ASSOCIATION

NARPM = NATIONAL ASSOCIATION OF RESIDENTIAL PROPERTY MANAGERS

VRMA = VACATION RENTAL MANAGEMENT ASSOCIATION

SCHA = SONOMA COUNTY HOSPITALITY ASSOCIATION

SCTB = SONOMA COUNTY TOURISM BUREAU

Thank you for giving us an opportunity to be of service. It would be our pleasure to talk further and address your concerns.

Respectfully, Pamela Taeuffer