



"We want to help to relieve the pain and uncertainty of renting out your property."
**A PROPOSAL OUTLINING THE KEYS TO A GREAT EXPERIENCE FOR THE INVESTOR /
OWNER AND BROKER / MANAGER**

PRESENTED BY: PAMELA TAEUFFER, BROKER AND OWNER
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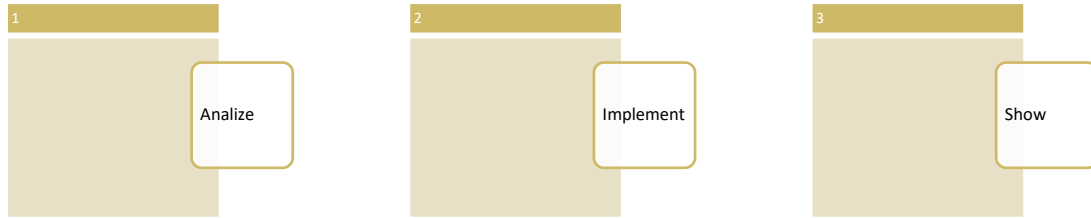
707-433-8899

OBJECTIVES:

HEALDSBURG PROPERTY MANAGEMENT is a family owned and operated business with more than twenty years of experience in Sonoma County. We believe Property Management is not a sales or numbers business, rather it is one of relationships – being an ambassador for the property owner and becoming an asset manager, protecting the investment as the number one priority.



- Protecting the asset is our number one goal. Ways to contribute to that end:
 1. Careful tenant screening (in 20+ years I have been in business I've only been to eviction court twice). Screening parameters for us are as follows:
 - a. FICO – 650+
 - b. SS# verification
 - c. ID Verification
 - d. Income – 2.5 times the rent
 - e. Acid ratio: 2:1 Assets v Liabilities
 - f. Pet Screening, if pets allowed
 - g. Income/Employment verification
 - h. Landlord verification
 - i. Detailed Leases approved by the attorneys for California Apartment Association and California Realtors Association
 2. Using a combination of forms published by the Associations mentioned in 1(i) for the most thorough agreements and addendums
 3. Detailed move-in walk through with date/time-stamped photos and written report
 4. Annual inspection – or interim if needed, with date/time – stamped photos and report
 5. Maintenance guidelines and educational portals for tenants
 6. Investor portals to view rents and statements
 7. Clearly detailed monthly statements to Investor/Property Owner
- Position ourselves as an ambassador for the Investor/Owner. In changing economic and political climates, an undercurrent is swelling against wealth building through income property and home ownership. HPM positions themselves as a calming influence through fair, friendly and objective policies, while keeping the fiduciary duty and owner contract relationship strong and intact.
- Update the Investor on changing laws and potential bills in Sacramento and when to lobby your representatives to vote against damaging legislation for small property owners.
- Use technology and AI wisely without losing the human connection.
- Detailed market analysis and periodic refresh of data
- Holding a Broker license with the California Department of Real Estate and the California Association of Realtors, holding us to a higher standard of ethics.
- Membership in professional organizations dedicated to the education of property managers and presence in Sacramento lobbying on behalf of Investors and Managers.



MARKETING PLAN

- Website content addition
- 7 days / week showings
- Zillow, Trulia, Apartments.com, Facebook Marketplace, Craigslist, Business-Business
- Social Media
- Local and regional membership/promotion
- Networking
- Word of mouth referrals



- You will reach the same people when you call or email us
- Our goal is to make problems go away, keep the Investor in the loop through consistent communications
- Our tenant screening record is A+
- Our trust accounting is audited and balanced monthly by an independent firm to ensure compliance with Department of Real Estate

We work hard to meet *your property goals whether they are immediate profit or holding for sale in the long term. 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 not what you were hoping to hear. We will apply guidelines fairly and update any needed paperwork. In addition:

- Assess the current rent with a professional rent analysis;
- Assess property for maintenance/updating;
- If vacant, begin promoting as soon as unit is ready;
- Existing tenant/s: Making sure all are on the most current rental/lease agreements, including the latest disclosures and addendums;

- Serve proper notices as needed, meet existing tenants and walk through those units;
 - Periodic assessments performed accompanied by a professional report and date/time-stamped photos of interior and exterior. (NOTE: We are not licensed contractors. This is a visual inspection only, looking for deferred maintenance housekeeping habits we can help with.)
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OBJECTIVE

Work to solve problems/issues that cause the Investor/Housing Provider stress/worry.

Address your biggest concerns to relieve any pain points.

Meet your personal and financial goals and continue with updates on property values for other potential investments or taking cash out.

Build trust through transparency, documenting the first 90 days with photos and updates, Advise of legislative and market conditions, and providing consistent communication

We live and work in Healdsburg and are centrally located to quickly serve most of Sonoma County.

HOW WE STAY UPDATED/INFORMED

- HPM attends conferences yearly
- Professional membership in several prestigious organizations-CAA, NARPM, CAR
- Monthly webinars and Ethics compliance
- Forms updates as soon as a legal change is made in California

With over twenty years of experience, we continually infuse the business with best practices and new ideas **when warranted**. Our team is local. We can respond to an emergency in just a few minutes. We contribute to a variety of charities including Redwood Empire Food Bank, Boys & Girls Club, Becoming Independent, Meals on Wheels, and more.

WHAT IS THE DESIRED OUTCOME? A THOROUGH DISCUSSION WILL ADDRESS YOUR ISSUES. IN ADDITION WE PLEDGE TO:

- Create easy and streamlined processes for property investor/housing provider.
- Create easy and streamlined processes for residents, encouraging timely tenant payments via online/direct deposit methods, maintenance portals 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 our property owners are protected.
- Periodic assessment meetings either virtually, on the telephone or in person, making sure Investor/Housing Provider goals are being met or discuss changes to consider.



BUDGET:

- A. The normal fees to both management and place new tenants are described in B-L below.
- B. New tenants: Level 1 - 40% first full month's rent (for new tenants) + 7% monthly. Level 2 – 40% first full month's rent (for new tenants) and 9% monthly.
- C. If management contract is for three + properties, Placement commission for new tenants is 30% and Management is 6% for level 1 program and 8% for level 2 program.
- D. If monthly furnished, 15% of full month's rent for term of rental agreement.
- E. We will handle and automatically deduct for routine maintenance for amounts up to \$1000.
- F. Late fees are split 50/50 with Investor/Owner/Housing provider
- G. NSF fee (returned rent from insufficient funds) are to HPM 100% to cover trust charges
- H. No markup on maintenance. Whatever vendor charges you pay.
- I. 10% lease renewals
- J. Monthly Profit and Loss Statements
- K. Year end summary of profit and loss, market condition and property reports, observations
- L. 1099 reporting gross owner income by Jan. 31 for tax reporting

In closing, it would be our sincere pleasure to welcome your property into our portfolio. We are successful only if you are successful and we take our fiduciary responsibilities seriously. Our continual membership in organizations that advance the income property management industry allows us to often get the first look at legislation being considered, coming technology, and changing procedures. Although we are a small and growing company, we have a multitude of "boots on the ground" and technology features which allow us to manage from anywhere we are on any given day.

Thank you for reviewing our proposal. We welcome any feedback and look forward to a long and productive relationship.

Pamela Taeuffer, Owner/Broker