



SUNDIAL REAL ESTATE

OWNER INFORMATION SHEET

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CLIENT INFORMATION			
LAST NAME		FIRST NAME	MIDDLE NAME
DATE OF BIRTH	DRIVER'S LICENSE NO.	STATE	SOCIAL SECURITY NO.
PRESENT ADDRESS		CITY	STATE ZIP CODE
HOME PHONE	WORK PHONE	CELL PHONE	
EMAIL ADDRESS			

SPOUSE/PARTNER INFORMATION			
LAST NAME		FIRST NAME	MIDDLE NAME
DATE OF BIRTH	DRIVER'S LICENSE NO.	STATE	SOCIAL SECURITY NO.
PRESENT ADDRESS		CITY	STATE ZIP CODE
HOME PHONE	WORK PHONE	CELL PHONE	
EMAIL ADDRESS			

MONTHLY ACCOUNT STATEMENT	
<input type="checkbox"/>	Please mail a paper copy of my statement to the following street address (if different from above): STREET ADDRESS:
<input type="checkbox"/>	NOTE: If you have an investment partner(s) who requires a separate monthly property statement and is entitled to receive a portion of the owner proceeds, please check this box and fill out separate forms for each partner

OWNER DRAW OPTIONS		
On or before the tenth (10 th) day of each month, Agent will render to Owner the Reports and the owner proceeds showing the operations and ending balance for the prior month.		
If you wish, we can send your owner proceeds directly to your bank (this can save you time and effort.)		
<input type="checkbox"/>	NO, do not send owner proceeds to my bank. Send them to the address above.	
<input type="checkbox"/>	YES, please send owner proceeds to my bank (fill in the blanks below). It will automatically be taken out of Checking unless otherwise indicated.	
NAME OF BANK & BRANCH OR ADDRESS	ROUTING NUMBER	ACCOUNT NUMBER
NOTE: If in the future there are any changes in the information on this completed form, please notify Sundial Real Estate Property Management in writing as soon as possible. THANK YOU.		



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DISBURSEMENT INFORMATION
Sundial Real Estate Property Management will pay your reoccurring bills on your behalf. Below is a list of the most common of these bills. Please review each item and indicate whether you want to pay the bill yourself or prefer Sundial Real Estate Property Management pay the bill on your behalf.

1. MORTGAGE PAYMENT

- Owner will continue to pay.
Sundial Real Estate Property Management will pay on owner's behalf from funds in the trust account.

PAYMENT ADDRESS

Table with 3 columns: PAYMENT AMOUNT, PAYMENT DUE DATE, LOAN NUMBER

2. SECOND TRUST DEEDS PAYMENT

- Owner will continue to pay.
Sundial Real Estate Property Management will pay on owner's behalf from funds in the trust account.

PAYMENT ADDRESS

Table with 3 columns: PAYMENT AMOUNT, PAYMENT DUE DATE, LOAN NUMBER

3. PROPERTY TAX PAYMENTS

- Owner will continue to pay.
Sundial Real Estate Property Management will pay on owner's behalf from funds in the trust account.

PAYMENT ADDRESS

Table with 3 columns: PAYMENT AMOUNT, PAYMENT DUE DATE, TAX NUMBER

\$ _____ 1st installment is due on the 1st day of November--1st installment is late after the 10th of December
\$ _____ 2nd installment is due on the 1st day of February--2nd installment is late after the 10th of April.

4. INSURANCE PREMIUMS

- Owner will continue to pay.
Sundial Real Estate Property Management will pay on owner's behalf from funds in the trust account.

NAME OF AGENCY

PAYMENT ADDRESS

Table with 3 columns: PAYMENT AMOUNT, NEXT PREMIUM DATE, INSURANCE POLICY NUMBER

5. HOMEOWNER DUES

- Owner will continue to pay.
Sundial Real Estate Property Management will pay on owner's behalf from funds in the trust account.

PAYMENT ADDRESS

Table with 2 columns: PAYMENT AMOUNT, PAYMENT DUE DATE



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6. GARDEN OR POOL SERVICE		
<input type="checkbox"/>	Owner will continue to pay.	<input type="checkbox"/> Tenant pays.
<input type="checkbox"/>	Sundial Real Estate Property Management will pay on owner's behalf from funds in the trust account.	
PAYMENT ADDRESS		
PAYMENT AMOUNT		PAMENT DUE DATE
7. UTILITIES: WATER		
<input type="checkbox"/>	Owner will continue to pay.	<input type="checkbox"/> Tenant pays.
<input type="checkbox"/>	Sundial Real Estate Property Management will pay on owner's behalf from funds in the trust account.	
PAYMENT ADDRESS		
PAYMENT AMOUNT	PAYMENT DUE DATE	ACCOUNT NUMBER
8. UTILITIES: ELECTRICITY		
<input type="checkbox"/>	Owner will continue to pay.	<input type="checkbox"/> Tenant pays.
<input type="checkbox"/>	Sundial Real Estate Property Management will pay on owner's behalf from funds in the trust account.	
PAYMENT ADDRESS		
PAYMENT AMOUNT	PAYMENT DUE DATE	ACCOUNT NUMBER
9. UTILITIES: GAS		
<input type="checkbox"/>	Owner will continue to pay.	<input type="checkbox"/> Tenant pays.
<input type="checkbox"/>	Sundial Real Estate Property Management will pay on owner's behalf from funds in the trust account.	
PAYMENT ADDRESS		
PAYMENT AMOUNT	PAYMENT DUE DATE	ACCOUNT NUMBER
10. UTILITIES: TRASH BIN		
<input type="checkbox"/>	Owner will continue to pay.	<input type="checkbox"/> Tenant pays.
<input type="checkbox"/>	Sundial Real Estate Property Management will pay on owner's behalf from funds in the trust account.	
PAYMENT ADDRESS		
PAYMENT AMOUNT	PAYMENT DUE DATE	ACCOUNT NUMBER
11. OTHER:		
<input type="checkbox"/>	Owner will continue to pay.	<input type="checkbox"/> Tenant pays.
<input type="checkbox"/>	Sundial Real Estate Property Management will pay on owner's behalf from funds in the trust account.	
PAYMENT ADDRESS		
PAYMENT AMOUNT	PAYMENT DUE DATE	ACCOUNT NUMBER



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SPECIAL INSTRUCTIONS

Please use the area below to tell us about anything you feel might be important, so that we will be better able to manage your property.

A large rectangular area containing 20 horizontal lines for writing special instructions.