



Information About Brokerage Services

11-2-2015

Texas law requires all real estate license holders to give the following information about brokerage services to prospective buyers, tenants, sellers and landlords.

TYPES OF REAL ESTATE LICENSE HOLDERS:

- **A BROKER** is responsible for all brokerage activities, including acts performed by sales agents sponsored by the broker.
- **A SALES AGENT** must be sponsored by a broker and works with clients on behalf of the broker.

A BROKER'S MINIMUM DUTIES REQUIRED BY LAW (A client is the person or party that the broker represents):

- Put the interests of the client above all others, including the broker's own interests;
- Inform the client of any material information about the property or transaction received by the broker;
- Answer the client's questions and present any offer to or counter-offer from the client; and
- Treat all parties to a real estate transaction honestly and fairly.

A LICENSE HOLDER CAN REPRESENT A PARTY IN A REAL ESTATE TRANSACTION:

AS AGENT FOR OWNER (SELLER/LANDLORD): The broker becomes the property owner's agent through an agreement with the owner, usually in a written listing to sell or property management agreement. An owner's agent must perform the broker's minimum duties above and must inform the owner of any material information about the property or transaction known by the agent, including information disclosed to the agent or subagent by the buyer or buyer's agent.

AS AGENT FOR BUYER/TENANT: The broker becomes the buyer/tenant's agent by agreeing to represent the buyer, usually through a written representation agreement. A buyer's agent must perform the broker's minimum duties above and must inform the buyer of any material information about the property or transaction known by the agent, including information disclosed to the agent by the seller or seller's agent.

AS AGENT FOR BOTH - INTERMEDIARY: To act as an intermediary between the parties the broker must first obtain the written agreement of each party to the transaction. The written agreement must state who will pay the broker and, in conspicuous bold or underlined print, set forth the broker's obligations as an intermediary. A broker who acts as an intermediary:

- Must treat all parties to the transaction impartially and fairly;
- May, with the parties' written consent, appoint a different license holder associated with the broker to each party (owner and buyer) to communicate with, provide opinions and advice to, and carry out the instructions of each party to the transaction.
- Must not, unless specifically authorized in writing to do so by the party, disclose:
 - that the owner will accept a price less than the written asking price;
 - that the buyer/tenant will pay a price greater than the price submitted in a written offer; and
 - any confidential information or any other information that a party specifically instructs the broker in writing not to disclose, unless required to do so by law.

AS SUBAGENT: A license holder acts as a subagent when aiding a buyer in a transaction without an agreement to represent the buyer. A subagent can assist the buyer but does not represent the buyer and must place the interests of the owner first.

TO AVOID DISPUTES, ALL AGREEMENTS BETWEEN YOU AND A BROKER SHOULD BE IN WRITING AND CLEARLY ESTABLISH:

- The broker's duties and responsibilities to you, and your obligations under the representation agreement.
- Who will pay the broker for services provided to you, when payment will be made and how the payment will be calculated.

LICENSE HOLDER CONTACT INFORMATION: This notice is being provided for information purposes. It does not create an obligation for you to use the broker's services. Please acknowledge receipt of this notice below and retain a copy for your records.

| | | | |
|--|-------------|---------------------|----------------|
| RentLife Property Management | 9007948 | mark@rentlifepm.com | (832) 562-3600 |
| Licensed Broker/Broker Firm Name or Primary Assumed Business Name | License No. | Email | Phone |
| Mark Kallus | 0432847 | mark@rentlifepm.com | (832) 562-3600 |
| Designated Broker of Firm | License No. | Email | Phone |
| Mark Kallus | 0432847 | mark@rentlifepm.com | (832) 562-3600 |
| Licensed Supervisor of Sales Agent/ Associate | License No. | Email | Phone |
| Mark Kallus | 0432847 | mark@rentlifepm.com | (832) 562-3600 |
| Sales Agent/Associate's Name | License No. | Email | Phone |

Buyer/Tenant/Seller/Landlord Initials

Date

Regulated by the Texas Real Estate Commission

Information available at www.trec.texas.gov

IABS 1-0
TAR 2501



RESIDENTIAL LEASING AND PROPERTY MANAGEMENT AGREEMENT

USE OF THIS FORM BY PERSONS WHO ARE NOT MEMBERS OF THE TEXAS ASSOCIATION OF REALTORS®, INC. IS NOT AUTHORIZED.
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1. PARTIES:

A. The parties to this agreement are:

Owner: _____

Address: _____

City, State, Zip: _____

Mobile: _____ Wk. Ph: _____ Hm. Phone: _____

Fax/E-mail: _____ Fax/E-Mail: _____

Additional Phones or Contact Information: _____

Broker: **RentLife Property Management**

Address: **14010 Alice Road**

City, State, Zip: **Tomball, TX 77377**

Phone: **(832)562-3600** Mobile: _____

Fax/E-mail: **mark@rentlifepm.com** Fax/E-Mail: _____

B. If Owner is not an individual, Owner is a: ☐ estate ☐ corporation ☐ limited liability company (LLC) ☐ trust ☐ partnership ☐ limited liability partnership (LLP) ☐ other _____, which was chartered or created in _____ (State). The individual signing this agreement for the owner represents to Broker that he or she has the authority to bind Owner to this agreement, to act for Owner, and is acting under his capacity as _____ (title) for the Owner.

C. Owner appoints Broker as Owner's sole and exclusive leasing and managing agent of the real property described in Paragraph 2 and in any addendum to this agreement.

2. PROPERTY: "Property" means:

Address (include unit nos.) _____

legally described as: _____

in _____ County, Texas, together with the following non-real-property items: _____

"Property" also includes any other Property described in any attached Multiple Property Addendum.

3. TERM:

A. Primary Term: The primary term of this agreement begins and ends as follows:

Commencement Date: **October 1, 2023** Expiration Date: **September 30, 2024**

B. Automatic Extension: Unless either party provides written notice of termination to the other party at least 30 days before the Expiration Date, this agreement will automatically extend on a monthly basis until either party terminates by providing at least 30 days written notice to the other party.

- C. Effective Services: If Broker determines that Broker cannot continue to effectively provide leasing and management services to Owner for any reason at any time during this agreement Broker may terminate this agreement by providing at least 30 days written notice to Owner.
- D. Fees Upon Termination: At the time this agreement ends, Owner must pay Broker amounts specified in Paragraph 12.

4. AUTHORITY OF BROKER:

- A. Leasing and Management Authority: Owner grants to Broker the following authority which Broker may exercise when and to the extent Broker determines to be in Owner's interest:
- (1) advertise the Property for lease at Owner's expense by means and methods that Broker determines are reasonably competitive, including but not limited to creating and placing advertisements with interior and exterior photographic and audio-visual images of the Property and related information in any media and the Internet;
 - (2) place "For Lease" signs or other signs on the Property in accordance with applicable laws, regulations, ordinances, restrictions, and owners' association rules;
 - (3) remove all other signs offering the Property for sale or lease;
 - (4) submit the Property as a listing with one or more Multiple Listing Services (MLS) at any time the Property is marketed for lease and to change or terminate such listings;
 - (5) authorize other brokers, their associates, inspectors, appraisers, and contractors to access the Property at reasonable times for purposes contemplated by this agreement and to lend keys and disclose security codes to such persons to enter the Property;
 - (6) duplicate keys and access devices, at Owner's expense, to facilitate convenient and efficient showings of the Property and to lease the Property;
 - (7) place a keybox on the Property;
 - (8) employ scheduling companies to schedule showings by other brokers at any time the Property is marketed for lease;
 - (9) verify information and references in rental applications from prospective tenants;
 - (10) negotiate and execute leases on Owner's behalf for the Property at market rates and on competitively reasonable terms for initial terms of not less than 12 months and not more than 24 months and in accordance with any instructions in Paragraph 20;
 - (11) negotiate and execute any amendments, extensions, or renewals to any leases for the Property on Owner's behalf;
 - (12) terminate leases for the Property, negotiate lease terminations, and serve notices of termination;
 - (13) collect and deposit for Owner rents, security deposits, and other funds related to the Property in a trust account and pay from that account: (a) any compensation and reimbursements due Broker under this agreement; and (b) other persons as this agreement may authorize.
 - (14) account for security deposits that Broker holds in trust to any tenants in the Property in accordance with applicable law, this agreement, and any lease of the Property and make deductions from the deposits in accordance with the lease and applicable law;
 - (15) collect administrative charges including but not limited to, application fees, returned check fees, and late charges from tenants in the Property or from prospective tenants;
 - (16) institute and prosecute, at Owner's expense, actions to: (a) evict tenants in the Property; (b) recover possession of the Property; or (c) recover lost rent and other damages;
 - (17) settle, compromise, or withdraw any action described in Paragraph 4A(16);
 - (18) negotiate and make reasonable concessions to tenants or former tenants in the Property;
 - (19) report payment histories of tenants in the Property to consumer reporting agencies;
 - (20) obtain information from any holder of a note secured by a lien on the Property and any insurance company insuring all or part of the Property;

- (21) hire contractors to repair, maintain, redecorate, or alter the Property provided that Broker does not expend more than \$ **\$500.00** _____ for any single repair, maintenance item, redecoration, or alteration without Owner's consent;
- (22) hire contractors to make emergency repairs to the Property without regard to the expense limitation in Paragraph 4A(21) that Broker determines are necessary to protect the Property or the health or safety of an ordinary tenant;
- (23) contract, at Owner's expense, in either Broker's or Owner's name, for utilities and maintenance to the Property during times that the Property is vacant, including but not limited to, electricity, gas, water, alarm monitoring, cleaning, pool and spa maintenance, yard maintenance, and other regularly recurring expenses that Broker determines are reasonable to maintain and care for the Property; and
- (24) perform other necessary services related to the leasing and management of the Property.

B. Record Keeping: Broker will:

- (1) maintain accurate records related to the Property and retain such records for not less than 4 years;
- (2) file reports with the Internal Revenue Service related to funds received on behalf of Owner under this agreement (for example, Form 1099); and
- (3) remit, each month, the following items to Owner: (a) funds collected by Broker for Owner under this agreement, less authorized deductions and rents not yet due according to the terms of the Owner's agreement with a tenant; and (b) a statement of receipts, disbursements, and charges. Owner may instruct Broker in writing to remit the items to another person or address.

C. Security Deposits:

- (1) During this agreement, Broker will maintain security deposits received from tenants in a trust account and will account to the tenants for the security deposits in accordance with the leases for the Property.
- (2) Except as stated in Paragraph 4(I), after this agreement ends, Broker will deliver to Owner or the Owner's designee the security deposit held by Broker under an effective lease of the Property, less deductions authorized by this agreement, and will send written notice to the tenant that states all of the following:
 - (a) that this agreement has ended;
 - (b) the exact dollar amount of the security deposit;
 - (c) the contact information for the Owner or the Owner's designee; and
 - (d) that Owner is responsible for accounting for and returning the tenant's security deposit.
- (3) If Broker complies with this Paragraph 4C, Owner will indemnify Broker from any claim or loss from a tenant for the return of a security deposit. This Paragraph 4C survives termination of this agreement.

D. Deductions and Offset: Broker may disburse from any funds Broker holds in a trust account for Owner:

- (1) any compensation due Broker under this agreement;
- (2) any funds Broker is authorized to expend under this agreement; and
- (3) any reimbursement Broker is entitled to receive under this agreement.

E. Insurance and Attorneys:

- (1) Broker may not file a claim for a casualty loss with the carrier insuring the Property. Broker may communicate with the carrier to facilitate the processing of any claim Owner may file or other matters that Owner instructs Broker to communicate to the carrier.
- (2) Broker may not directly or indirectly employ or pay a lawyer to represent Owner. Broker may communicate with Owner's attorney in accordance with Owner's instructions.

F. Trust Accounts, MLS, Keybox, and Listing Content:

- (1) Trust Accounts: A trust account must be separate from Broker's operating account and must be designated as a trust, property management or escrow account or other similar name. Broker may maintain one trust account for all properties Broker leases and manages for others.

- (2) MLS: MLS rules require Broker to accurately and timely submit all information the MLS requires for participation including leased data. Subscribers to the MLS and appraisal districts may use the information for market evaluation or appraisal purposes. Subscribers are other brokers and other real estate professionals such as appraisers. Any information filed with the MLS becomes the property of the MLS for all purposes. *Submission of information to MLS ensures that persons who use and benefit from the MLS also contribute information.*
- (3) Keybox: A keybox is a locked container placed on the Property that holds a key to the Property. A keybox makes it more convenient for brokers, their associates, inspectors, appraisers, and contractors to show, inspect, or repair the Property. The keybox is opened by a special combination, key, or programmed device, so that authorized persons may enter the Property. Using a keybox will probably increase the number of showings, but involves risks (for example, unauthorized entry, theft, property damage, or personal injury). *Neither the Association of REALTORS® nor MLS requires the use of a keybox.*
- (4) Listing Content:
- (a) "Listing Content" means all photographs, images, graphics, video recordings, virtual tours, drawings, written descriptions, remarks, narratives, pricing information, and other copyrightable elements relating to the Property. "Owner Listing Content" means Listing Content provided by Owner to Broker or Broker's associates. "Broker Listing Content" means Listing Content that is otherwise obtained or produced by Broker or Broker's associates in connection with this agreement.
 - (b) Owner grants Broker a non-exclusive, irrevocable, worldwide, royalty-free license to use, sublicense through multiple tiers, publish, display, and reproduce the Owner Listing Content, to prepare derivative works of the Owner Listing Content, and to distribute the Owner Listing Content, including any derivative works of the Owner Listing Content. This Paragraph 4F(4)(b) survives termination of this agreement.
 - (c) All Broker Listing Content is owned exclusively by Broker, and Owner has no right, title or interest in or to any Broker Listing Content.
 - (d) Owner understands and agrees that both the Owner Listing Content and Broker Listing Content, including any changes to such content, may be filed with the MLS, included in compilations of listings, and otherwise distributed, publicly displayed and reproduced.

G. Performance Standard: Broker will:

- (1) use reasonable care when exercising Broker's authority and performing under this agreement; and
- (2) exercise discretion when performing under this agreement in a manner that Broker believes to be in Owner's interest, provided that Broker will treat any tenant honestly and fairly.

H. Inability to Contact Owner: If Broker is unable to contact Owner for 2 days, Broker is authorized to contact the person below for the sole purpose of attempting to reestablish contact with Owner.

Name: _____ Phone: _____
Address: _____
E-mail: _____

I. Foreclosure: If Broker receives notice of the Owner's delinquency in the payment of: (1) any mortgage or other encumbrance secured by the Property; (2) property taxes; (3) property insurance; or (4) owners' association fees, Broker may give Owner 15 days to cure the delinquency during which period Owner authorizes Broker to freeze any funds held by Broker and no disbursements will be made to Owner related to this agreement or the Property. If after the 15 day period, the delinquency is not cured and the foreclosure process is initiated, Owner authorizes Broker to deduct from any other funds being held by Broker for Owner any remaining Broker Fees or funds due to Broker related to services performed under this agreement. Additionally, Owner authorizes Broker to return any security deposit

being held by Broker to a tenant of the Property in addition to any prorated amount of rent being held by Broker and Broker may terminate this agreement. This paragraph does not preclude the Broker from seeking any other remedies under this agreement or at law that may be available to the Broker.

- 5. LEGAL COMPLIANCE:** The parties will comply with all obligations, duties, and responsibilities under the Texas Property Code, fair housing laws, and any other statute, administrative rule, ordinance, or restrictive covenant applicable to the use, leasing, management, or care of the Property.
- 6. RESERVES:** Upon execution of this agreement, Owner will deposit the following amount with Broker to be held in a trust account as a reserve for Owner: \$ 500.00 for each unit within the Property or Properties managed by Broker under this agreement. Broker may, at Broker's discretion, use the reserve to pay any expense related to the leasing and management of the Property(ies) (including but not limited to Broker's fees). If the balance of the reserve becomes less than the amount stated, at any time, Broker may: (a) deduct an amount that will bring the balance to the amount stated from any subsequent rent received on behalf of Owner and deposit the amount into the reserve; or (b) notify Owner that Owner must promptly deposit additional funds with Broker to bring the balance to the amount stated.
- 7. ADVANCES:** Owner will, in advance, provide Broker all funds necessary for the leasing and management of the Property. Broker is not obligated to advance any money to Owner or to any other person.
- 8. OWNER'S REPRESENTATIONS:**

A. General:

(1) Except as disclosed in Paragraph 20, Owner represents that:

- (a) Owner has fee simple title to and peaceable possession of the Property and all its improvements and fixtures, unless rented, and the legal capacity to lease the Property;
- (b) Owner is not bound by: (i) another agreement with another broker for the sale, exchange, lease, or management of the Property that is or will be in effect during this agreement; or (ii) an agreement or covenant that prohibits owner from leasing the property;
- (c) no person or entity has any right to purchase, lease, or acquire the Property by an option, right of refusal, or other agreement;
- (d) Owner is not delinquent in the payment of any property taxes, owners' association fees, property insurance, mortgage, or any encumbrance on or affecting the Property;
- (e) the Property is not subject to the jurisdiction of any court;
- (f) the optional user fees for the use of common areas (for example, pool or tennis courts) in the Property's subdivision are: _____;
- (g) all information related to the Property that Owner provides to Broker is true and correct to the best of Owner's knowledge; and
- (h) the Owner Listing Content, and the license granted to Broker for the Owner Listing Content, do not violate or infringe upon the rights, including any copyright rights, of any person or entity.

(2) Broker may disclose to a tenant or to a prospective tenant any information related to the representations made in this Paragraph 8.

B. Property Condition: Owner and Broker are obligated under law to disclose to a tenant or to a prospective tenant any known condition that materially and adversely affects the health or safety of an ordinary tenant. Owner is obligated under the Property Code to repair any such condition for a tenant. Owner represents that:

- (1) any pool or spa and any required enclosures, fences, gates, and latches comply with all applicable laws and ordinances; and
- (2) Owner is not aware of a condition concerning the Property that materially affects the health or safety of an ordinary tenant, except as stated below, in this agreement, or in any addendum:

_____.

- C. **Lead-Based Paint:** If the Property was built before 1978, Owner will complete and attach to this agreement an addendum regarding lead-based paint and lead-based paint hazards that will be made part of any lease of the Property. If the Property was built before 1978, federal law requires the Owner (before a tenant is obligated under a lease) to: (1) provide the tenant with the federally approved pamphlet on lead poisoning prevention; (2) disclose the presence of any known lead-based paint or hazards in the Property; and (3) deliver all records and reports to the tenant related to such paint or hazards.

9. OWNER'S COOPERATION: Owner agrees to:

- A. cooperate with Broker to facilitate the showing, marketing, and lease of the Property;
- B. not rent or lease the Property to anyone without Broker's prior written approval;
- C. not negotiate with any prospective tenant who might contact Owner directly, but refer all prospective tenants to Broker;
- D. not deal with or negotiate with any tenant in the Property concerning any matter related to the management or leasing of the Property but refer all such dealings to Broker;
- E. not enter into a listing agreement or property management agreement with another broker for the rental, leasing, or management of the Property to become effective during this agreement;
- F. provide Broker with copies of any existing leases or rental agreements related to the Property;
- G. provide Broker with keys and access devices to the Property;
- H. provide Broker with copies of all warranties related to the Property or any item in the Property;
- I. tender to Broker any security deposits paid by any existing tenants in the Property;
- J. complete any disclosures or notices required by law or a lease of the Property;
- K. amend applicable notices and disclosures if any material change occurs during this agreement; and
- L. notify Broker if Owner becomes delinquent in the payment of: (1) any mortgage or other encumbrance secured by the Property; (2) property taxes; (3) property insurance; or (4) owners' association fees.

10. INSURANCE:

- A. At all times during this agreement, Owner must maintain in effect:
 - (1) a public liability insurance policy that names Broker as a co-insured or additional insured and covers losses related to the Property in an amount of not less than \$ **500,000.00** on an occurrence basis; and
 - (2) an insurance policy for the Property in an amount equal to the reasonable replacement cost of the Property's improvements and that contains endorsements which contemplate the leasing of the Property with vacancies between lease terms.
- B. Not later than the 15th day after the Commencement Date, Owner must deliver to Broker copies of certificates of insurance evidencing the coverage required under Paragraph 10A. If the coverage changes at any time during this agreement, Owner must deliver to Broker a copy of the insurance certificate evidencing the change not later than 10 days after the change.
- C. If Owner fails to comply with Paragraphs 10A or 10B, Broker may:
 - (1) purchase insurance that will provide Broker the same coverage as the required insurance under Paragraph 10A(1) and Owner must promptly reimburse Broker for such expense; or
 - (2) exercise Broker's remedies under Paragraph 17.

11. BROKER'S FEES: All fees to Broker under this agreement are payable in **HARRIS** County, Texas. This Paragraph 11 survives termination or expiration of this agreement with regard to fees earned during this agreement which are not payable until after its termination. Broker may deduct any fees under this Paragraph 11 from any funds Broker holds in trust for Owner, except for the fees specified under Paragraph 11(I). If more than one property or unit is made part of and subject to this agreement, each of the provisions below will apply to each property or unit separately.

- ☒ A. **Management Fees:** Each month Owner will pay Broker the greater of \$ **120.00** (minimum management fee) or: *(Check one box only.)*
- ☒ (1) **8.990** % of the gross monthly rents collected that month.
- ☐ (2) _____.

A vacancy in the Property or failure by a tenant to pay rent does not excuse payment of the minimum management fee. Management fees under this Paragraph 11A are earned daily and are payable not later than the last day of each month.

☒ B. Leasing Fees for New Tenancies: Each time the Property is leased to a new tenant, Owner will pay Broker a leasing fee equal to: *(Check one box only.)*

- ☒ (1) 85.000 % of one full month's rent to be paid under the lease.
☐ (2) _____ % of the gross rents to be paid under the lease.
☐ (3) _____ .

The leasing fees under this Paragraph 11B are earned and payable at the time the lease is executed.

☒ C. Renewal or Extension Fees: Each time a tenant in the Property renews or extends a lease, Owner will pay Broker a renewal or extension fee equal to: *(Check one box only.)*

- ☐ (1) _____ % of one full month's rent to be paid under the renewal or extension.
☐ (2) _____ % of the gross rents to be paid under the renewal or extension.
☒ (3) \$239 .

The renewal or extension fees under this Paragraph 11C are earned and payable at the time the renewal or extension is effective. For the purposes of this paragraph, a new lease for the same Property with the same tenant then occupying the Property is an extension or renewal. This Paragraph 11C does not apply to month-to-month renewals or month-to-month extensions.

☒ D. Service Fees: Each time Broker arranges for the Property to be repaired, maintained, redecorated, or altered as permitted by this agreement, Owner will pay Broker a service fee equal to: *(Check one box only.)*

- ☒ (1) 5.000 % of the total cost of each repair, maintenance, alteration, or redecoration.
☐ (2) _____ .

The service fees under this Paragraph 11D are earned at the time the repair, maintenance, redecoration, or alteration is made and are payable upon Owner's receipt of Broker's invoice.

☒ E. Interest on Trust Accounts: Any trust account Broker maintains under this agreement may be an interest-bearing or income producing account. Broker may retain any interest or income from such account as compensation under this agreement. Broker will remove any interest or income payable under this Paragraph 11E from the trust account not later than the 30th day after the interest or income is paid.

☒ F. Administrative Fees: If Broker collects administrative charges from tenants or prospective tenants, including but not limited to, application fees, returned check fees, or late charges (as authorized under Paragraph 4A), Broker will retain such fees as compensation under this agreement. The administrative fees under this Paragraph 11F are earned and payable at the time Broker collects such fees.

☒ G. Fees Related to Insurance and Legal Matters:

- (1) If Owner requests or instructs Broker to coordinate or communicate with any insurance carrier regarding any casualty to or on the Property Owner will Pay Broker \$100.00 per HOURL for Broker's time expended in such matters and in preparation of such matters.
(2) If Owner requests or instructs Broker to appear in any legal proceeding or deposition related to the Property (including, but not limited to, evictions, tenant disputes, security deposit disputes, and suits for damages), Owner will pay Broker \$100.00 per HOURL for Broker's time expended in such matters and in preparation of such matters.

Fees under this Paragraph 11G are earned at the time the services are rendered and payable upon Owner's receipt of Broker's invoice.

☒ H. Fees in the Event of a Sale:

- (1) Fee if a Tenant Purchases Property: If Owner sells the Property to a tenant who occupied the Property during the term of this agreement not later than the time the tenant vacates the Property, Owner will pay Broker a fee equal to: *(Check one box only.)*

- ☒ (a) 5 or 6 % of the sales price.
☐ (b) N/A .

Fees under this Paragraph 11H(1) are earned at the time Owner agrees to sell the Property and are payable at the time the sale closes. Broker will waive any fees due under Paragraph 12 at the time the sale closes.

- (2) Fee if Buyer is Procured through Broker: If during this agreement, Owner agrees to sell the Property to a person other than a tenant who occupied the Property and Broker procures the buyer, directly or through another broker, Owner will pay Broker a fee equal to: *(Check one box only.)*

☒ (a) 6.000 % of the sales price.

☐ (b) N/A

Fees under this Paragraph 11H(2) are earned at the time Owner agrees to sell the Property and are payable at the time the sale closes. Broker will waive any fees due under Paragraph 12 at the time the sale closes.

- (3) Sale Coordination Fees: If at any time during this agreement Owner agrees to sell the Property and Broker is not paid a fee under Paragraph 11H(1) or (2), Owner will pay Broker _____ for Broker's time and services to coordinate showings, inspections, appraisals, repairs, and other related matters. Fees under this Paragraph 11H(3) are earned at the time such services are rendered and payable upon Owner's receipt of Broker's invoice.

- (4) Definition: "Sell" means to agree to sell, convey, transfer or exchange any interest in the Property whether by oral or written agreement or option.

- (5) Separate Listing Agreement Controls: If Owner sells the Property and pays Broker the fee under a separate written listing agreement between Owner and Broker: (a) this Paragraph 11H will not apply; and (b) Broker will waive any fees due under Paragraph 12 at the time the sale closes.

- (I) Compensation from Benefit Programs or Packages: Broker may receive referral fees, periodic subscription fees, interest on outstanding debt, and other possible income by utilizing certain services involved with the management and/or leasing of the property. This may include but is not limited to: Administrative charges, HVAC filter subscription service, periodic property reviews, animal fees & rent, concierge utility services, cable/internet/phone services, or Tenant Benefit Program that may be offered, and other products or services provided. Any referral fee Broker receives under this Paragraph 11I is in addition to any other compensation Broker may receive under Paragraph 12.

- ☒ J. Other: 1. New Owner Account/Technology Setup Fee - \$ 175 per vacant unit (Required) or \$215 per occupied unit.

12. FEES UPON TERMINATION: At the time this agreement ends, Owner must pay Broker:

- A. all amounts due Broker under this agreement; and
B. if the Property is leased to a tenant on the date this agreement ends and Owner terminates this agreement, an amount equal to the greater of:
(a) the management fees that would accrue over the remainder of the term of the lease; or
(b) \$ _____; or
C. if the Property is not leased on the date this agreement ends and Owner terminates this agreement, \$ _____.

If more than one property or unit is made part of and subject to this agreement, this paragraph applies only to those properties or units then leased and applies to each property or unit separately.

- 13. EXPENSE REIMBURSEMENT:** Upon Owner's receipt of Broker's invoice, Owner will reimburse Broker the following expenses that are related to the leasing or management of the Property: (a) copy charges; (b) charges for long distance telephone calls or facsimile transmissions; (c) regular, express, or certified mail charges; (d) notary fees; (e) photos and videos; (f) reasonable travel expenses, including but not limited to mileage reimbursement (at the standard mileage rate published by the IRS), parking expenses, and tolls; and (g) any other expenditures Broker is authorized to make under this agreement for Owner or that Owner otherwise authorizes Broker to make for Owner.

14. FUNDS RECEIVED AFTER TERMINATION: Except as provided in Paragraph 4(l), if Broker receives any funds on behalf of Owner after this agreement ends (for example, rent, damages, past due amounts, and others), Broker will deposit those funds in Broker's trust account and will: (a) pay 10.000 % of the funds received to Broker as compensation for services (for example, research, accounting, communicating, and processing) rendered at that time; and (b) pay the balance of the funds to Owner. This provision survives termination of this agreement.

15. COOPERATION WITH OTHER BROKERS: When the Property is marketed for lease, Broker will allow other brokers to show the Property to prospective tenants. If the other broker procures a tenant who leases the Property, Broker will offer to pay the other broker a fee out of the compensation Broker receives under Paragraph 11. As of the date this agreement is signed, Broker's policy is to offer other brokers the following amounts. Broker may change the amounts disclosed below without notice, provided that Broker will offer competitively reasonable amounts to other brokers.

A. MLS Participants: If the other broker is a participant in the MLS in which the listing is filed, Broker will offer to pay the other broker:

(1) if the other broker represents the tenant (*complete only one*): 35.000 % of one month's rent to be paid under a lease; _____ % of all rents to be paid under a lease; or \$ _____ ; and

(2) if the other broker is a subagent (*complete only one*): _____ % of one month's rent to be paid under a lease; _____ % of all rents to be paid under a lease; or \$ _____ .

B. Non-MLS Brokers: If the other broker is not a participant in the MLS in which the listing is filed, Broker will offer to pay the other broker:

(1) if the other broker represents the tenant (*complete only one*): 35.000 % of one month's rent to be paid under a lease; _____ % of all rents to be paid under a lease; or \$ _____ ; and

(2) if the other broker is a subagent (*complete only one*): _____ % of one month's rent to be paid under a lease; _____ % of all rents to be paid under a lease; or \$ _____ .

16. LIABILITY AND INDEMNIFICATION:

A. **Broker is not responsible or liable in any manner for personal injury to any person or for loss or damage to any person's real or personal property resulting from any act or omission not caused by Broker's negligence, including but not limited to injuries or damages caused by:**

- (1) other brokers, their associates, inspectors, appraisers, and contractors who are authorized to access the Property;
- (2) acts of third parties (for example, vandalism, theft, or other criminal acts);
- (3) freezing or leaking water pipes;
- (4) failure to properly water the foundation of the Property;
- (5) a dangerous condition or environmental condition on the Property; or
- (6) the Property's non-compliance with any law or ordinance.

B. **Broker is not responsible or liable in any manner for:**

- (1) performing or certifying any inspections or surveys that may be required by local, state, or federal regulations;
- (2) any late fees or other charges Owner incurs to any creditor caused by late or insufficient payments by any tenant in the Property; or
- (3) damages to Owner caused by a tenant's breach of a lease.

C. **Owner agrees to protect, defend, indemnify, and hold Broker harmless from any damage, costs, attorney's fees, and expenses that:**

- (1) are caused by Owner, negligently or otherwise;
- (2) arise from Owner's failure to disclose any material or relevant information about the Property;
- (3) are caused by Owner giving incorrect information to any person; or

(4) are related to the management of the Property and are not caused by Broker, negligently or otherwise.

D. Owner is responsible and liable for all contracts and obligations related to the Property (for example, maintenance, service, repair and utility agreements) entered into before or during this agreement by Owner or by Broker under Broker's authority under this agreement. Owner agrees to hold Broker harmless from all claims related to any such contracts.

17. DEFAULT: A party is in default if the party fails to cure a breach within 10 days after receipt of written demand from the other party. If either party is in default, the non-defaulting party may: (a) terminate this agreement by providing at least 10 days written notice; (b) recover all amounts due to the non-defaulting party under this agreement; (c) recover reasonable collection costs and attorney's fees; and (d) exercise any other remedy available at law. Broker is also entitled to recover any compensation Broker would have been entitled to receive if Owner did not breach this agreement.

18. MEDIATION: The parties agree to negotiate in good faith in an effort to resolve any dispute related to this agreement that may arise between the parties. If the dispute cannot be resolved by negotiation, the dispute will be submitted to mediation. The parties to the dispute will choose a mutually acceptable mediator and will share the cost of mediation equally.

19. ATTORNEY'S FEES: If Owner or Broker is a prevailing party in any legal proceeding brought as a result of a dispute under this agreement or any transaction related to or contemplated by this agreement, such party will be entitled to recover from the non-prevailing party all costs of such proceeding and reasonable attorney's fees.

20. SPECIAL PROVISIONS: 1. See attached Special Provisions Addendum.

2. To comply with the Real Estate Commission, The Broker works with certain vendors that may provide rebate programs. Broker hereby discloses to Owner that, if offered, Broker may accept rebates from said vendors at no cost to Owner.

***** If this agreement is terminated, The Owner will no longer have access to their Owner's Web Portal to retrieve any additional documents. Suppose the Owner needs any documentation from RentLife Property Management after the termination of this agreement. In that case, each document will incur a \$145 fee payable in advance as we will have to unarchive the documents.**

Suppose this agreement terminates for any reason, and the Owner is due any remaining funds. In Continued... See Addendum Special Provisions 1

21. ADDENDA: Incorporated into this agreement are the following addenda, exhibits, and other information:

- ☒ A. Information About Brokerage Services
- ☒ B. Addendum Regarding Rental Flood Disclosure
- ☐ C. Addendum Regarding Lead-Based Paint
- ☐ D. Multiple Property Addendum
- ☒ E. Owner's Notice Concerning Condition of Property under Property Management Agreement
- ☐ F. Property Manager's Inventory and Condition Report
- ☒ G. Addendum for Authorization to Act for Owner before Owners' Association
- ☐ H. Copy of Rules and Regulations of an Owners' Association
- ☐ I. Copy of the Owners' Association Bylaws and Deed Restrictions affecting the Property
- ☒ J. IRS Form (W-9 or W-8)
- ☒ K. Owner's Authorization Concerning Unescorted Access to Property
- ☒ L. General Information for Landlord Regarding Assistance Animals
- ☒ M. **AUTHORIZATION AGREEMENT FOR DIRECT DEPOSIT**

PARAGRAPH 20, SPECIAL PROVISIONS AND ADDENDUM

Note: Complete and deliver to Broker IRS W-9 Form or similar form. Broker maintains a privacy policy that is available upon request.

22. AGREEMENT OF PARTIES:

- A. Entire Agreement: This document contains the entire agreement of the parties and may not be changed except by written agreement.
- B. Assignments: Neither party may assign this agreement without the written consent of the other party.
- C. Binding Effect: Owner's obligation to pay Broker an earned fee is binding upon Owner and Owner's heirs, administrators, executors, successors, and permitted assignees.
- D. Joint and Several: All Owners executing this agreement are jointly and severally liable for the performance of all its terms. Any act or notice to, refund to, or signature of, any one or more of the Owners regarding any term of this agreement, its extension, its renewal, or its termination is binding on all Owners executing this agreement.
- E. Governing Law: Texas law governs the interpretation, validity, performance, and enforcement of this agreement.
- F. Severability: If a court finds any clause in this agreement invalid or unenforceable, the remainder of this agreement will not be affected and all other provisions of this agreement will remain valid and enforceable.
- G. Context: When the context requires, singular nouns and pronouns include the plural.
- H. Notices: Notices between the parties must be in writing and are effective when sent to the receiving party's address, or e-mail address specified in Paragraph 1.
- I. Copyright: If an active REALTOR® member of Texas REALTORS® does not negotiate this agreement as a party or for one of the parties, with or without the assistance of an active member of the State Bar of Texas, this agreement is voidable at will by Owner.

23. INFORMATION:

- A. **Broker's fees or the sharing of fees between brokers are not fixed, controlled, recommended, suggested, or maintained by the Association of REALTORS®, MLS, or any listing service.**
- B. **In accordance with fair housing laws and the National Association of REALTORS® Code of Ethics, Broker's services must be provided and the Property must be shown and made available to all persons without regard to race, color, religion, national origin, sex, disability, familial status, sexual orientation, or gender identity. Local ordinances may provide for additional protected classes (for example, creed, status as a student, marital status, or age).**
- C. **Owner may review the information Broker submits to an MLS or other listing service.**
- D. **Broker advises Owner to remove or secure jewelry, prescription drugs, and other valuables.**
- E. **The Property Code requires the Property to be equipped with certain types of locks and security devices, including (with some exceptions): (1) window latches on each window; (2) a keyed doorknob lock or keyed deadbolt lock on each exterior door; (3) a sliding door pin lock on each exterior sliding glass door of the dwelling; (4) a sliding door handle latch or a sliding door security bar on each exterior sliding glass door of the dwelling; and (5) a keyless bolting device and a door viewer on each exterior door of the dwelling. The Property Code also requires smoke alarms in certain locations. The Property Code requires the security devices to be rekeyed and the smoke alarms to be tested each time a new tenant occupies the Property.**
- F. **Broker advises Owner to refrain from transmitting personal information, such as bank account numbers or other financial information, via unsecured email or other electronic communication to reduce risk of wire fraud.**

Leasing & Management Agreement concerning: _____

G. Broker cannot give legal advice. READ THIS AGREEMENT CAREFULLY. If you do not understand the effect of this agreement, consult an attorney BEFORE signing.

RentLife Property Management

Broker's Printed Name **9007948** License No.

Owner's Printed Name

☒ Broker's Signature _____ Date _____
☐ Broker's Associate's Signature, as an authorized agent of
Broker

Owner's Signature _____ Date _____

Mark A. Kallus

Broker's Associate's Printed Name, if applicable

Owner's Printed Name

Owner's Signature _____ Date _____

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ADDENDUM

PROPERTY: _____

1) Special Provisions

that case, the management company will not refund funds until after 60 days since the Owner's last ACH Direct Deposit Contribution.

The Owner understands that some "wear and tear" expenses will occur and that these costs cannot be charged to a Tenant and realizes that the Owner will incur these expenses.

If the Owner or Broker is a prevailing party in any proceeding brought as a result of a dispute under this agreement or any transaction related to or contemplated by this agreement, such party will be entitled to recover from the non-prevailing party all costs of such proceedings and reasonable attorney's fees not to exceed \$1,000.

**** If management is terminated for any reason, RentLife Property Management will hold all distribution payments, pay all final invoices, and assess any applicable fees per the PMA. The final distribution, which includes remaining rent proceeds, reserves, and resident security deposits, will be issued within 30-45 business days after the last date of management, along with final owner statements.**

Date: _____

Date: _____

Signature _____

Signature _____

Date: _____

Date: _____

Signature _____

Signature _____

Addendum

Paragraph 20, Special Provisions and Addendum

As an Addendum to the preceding Residential Leasing and Property Management Agreement (the "Agreement") and continuation of Paragraph 20, Special Provisions of the Agreement, the Owner and Broker agree to the following additional provisions which control over any provision in the Agreement in the event of any conflict. Owner and Broker agree:

1. The Broker will remit funds to the Owner by electronic deposits into the Owner's designated online account.

Agreed: _____ Owner _____ Broker

2. Paragraph 4.A. is changed as follows. At the end of Paragraph 4.A.(24), the following is added:
4.A.(25) Administrative Fees: If the Broker collects administrative charges from tenants or prospective tenants, including but not limited to application fees, posting fees, return check fees, reletting fees, late charges, or other customary fees, the Broker will retain such fees as compensation under this Agreement. The Broker need not account to the Owner for such fees, and these administrative fees are earned and payable at the time the Broker collects such fees.

Agreed: _____ Owner _____ Broker

3. Paragraph 4.A. is changed as follows. At the end of Paragraph 4.A.(25), the following is added:
4.A.(26) The Owner agrees to accept the terms of the collection agency's standard contract when executed for the Owner by the Broker. When acting in a collection capacity to collect funds due from ex-tenants, the Broker will retain 40% of all net funds collected after the collection company receives their portion for this service in addition to the management fee listed in Section 11.

Agreed: _____ Owner _____ Broker

4. Paragraph 4.H. is changed as follows. At the end of Paragraph 4. H, the following is added: "After making foregoing attempts during the contract period, Broker may exercise Broker's discretion in resolving the issue for which the contact was attempted without recourse by Owner."

Agreed: _____ Owner _____ Broker

5. Paragraph 7. Advances: The Broker is not obligated to advance any money to the Owner or on the Owner's behalf. Suppose the Owner's ending bank balance is below the total reserve and security deposit minimum balance at any time to pay disbursements due. In that case, the Owner will, immediately upon notice, remit the Broker sufficient funds to cover deficiency and replenish the reserve. If the Broker does advance funds on the Owner's behalf, then any funds not paid to the Broker within 10 days of the request will bear interest at a rate of 4% per month.

Agreed: _____ Owner _____ Broker

6. Periodic Property Visits: To accomplish the periodic security devices, smoke alarms, and the necessity to view the Property. The Broker will contract with a professional, unbiased third-party company that provides these services. This company will document the condition of the home, including these mandatory items, deferred maintenance and/or other concerns. Multiple photos of the home, both inside and out, will be included in the assessment. The report will be uploaded to the Owner's online portal, and any items requiring repairs will either be addressed or discussed with the Owner. The fee will be charged to the Owner's account. The Broker will typically attempt to schedule this one a year around the time for the Tenant's lease renewal.

This will assist the Broker and Owner in determining how the Tenant is maintaining the Property and if there are any issues to be addressed.

Agreed: _____ Owner _____ Broker

7. Paragraph 9. is changed as follows. At the end of Paragraph 9. (L)., the following is added:

9.M. If the Owner does **NOT** want the Broker to perform a lease renewal, the Owner must notify the Broker in writing a minimum of 120 days before the lease expiration date.

Agreed: _____ Owner _____ Broker

8. Management services do not include the following:

Routine property management does not include monthly inspections, representations at court hearings, depositions, homeowner meetings, providing on-site management, property sales, preparing Property for sale, supervising and coordinating modernization, rehabilitation, fire or significant damage restoration projects; obtaining income tax, accounting or legal advice; advising on proposed new construction, debt collection, counseling, legal proceedings, or insurance-related paperwork and estimates. If the Broker performs services not included in routine property management or specified above, the Owner shall pay Broker a fee of \$ 100 per hour.

Agreed: _____ Owner _____ Broker

9. Owner agrees that Agent shall handle Tenant relations. The Owner will not contact the Tenant directly, and the Owner will refer the Tenant back to the Agent if the Tenant contacts the Owner directly.

Agreed _____ Owner _____ Broker

10. Broker may assign its rights and delegate its duties under this Agreement without the Owner's consent, provided that the assignee agrees to assume and perform every covenant and term of this Agreement applies to the Broker.

Agreed: _____ Owner _____ Broker

11. Bounced Tenant Payments. If a tenant payment is returned (e.g., a "bounced check") by the bank or payment processor after payment has already been sent to the Owner by Broker, Owner expressly authorizes Broker to debit Owner's checking account in the amount of the tenant payment that was returned to bring the trust account above a negative amount.

Agreed: _____ Owner _____ Broker

12. Trust Account Reporting. Broker shall provide Owner a detailed monthly accounting of funds (not later than 30 days after the end of each month) received and disbursed on the Owner's behalf and shall remit to Owner the balance of such funds in excess of the minimum required balance, if any, remaining after Broker deducts and pays the Expenses referenced above. Upon Termination of this Agreement, Broker shall have forty-five (45) days to provide a final accounting of funds and to remit the balance to the Owner.

Agreed: _____ Owner _____ Broker

13. At the end of each year, Broker will charge the Owner an Annual Administration Fee of \$25.00 to cover any additional increase in operating expenses.

Agreed: _____ Owner _____ Broker

14. At the expiration of this Agreement's initial and subsequent term, all terms and conditions are subject to change by Broker, with a 30-day notice to the Owner. Notices between the parties must be in writing and are effective when sent to the receiving party's address or email address.

Agreed: _____ Owner _____ Broker

15. Holding of Funds Following Tenant Move-Out. Upon a tenant's move-out from the Property, Owner authorizes Broker to hold Owner's funds in escrow to pay any necessary repairs and cleaning costs, outstanding utility bills, and other amounts due under this Agreement until completion of the turnover.

Agreed: _____ Owner _____ Broker

16. Suppose this Agreement terminates before, at the same time, or within 30 days after an expiring tenant lease agreement. In that case, the Owner shall complete the security deposit disposition to the Tenant. All funds shall be distributed to the Owner within 45 business days of the termination date, pending no outstanding invoices that need to be paid from the Owner's proceeds.

Agreed: _____ Owner _____ Broker

17. In the case of a pending foreclosure, the Broker may freeze all Owner related funds and withhold disbursements.

Agreed: _____ Owner _____ Broker

18. Upon Termination of management of a property, if an Owner needs access to any paperwork, including invoices, and owner statements, via an online portal. RentLife Property Management charges a \$ 150.00 Administration Fee for such access.

Agreed: _____ Owner _____ Broker

Owner: _____

Broker: _____
RENTLIFE® PROPERTY MANAGEMENT

Owner: _____

Signed simultaneously with Agreement

Signed simultaneously with the Agreement

Power of Guarantees

30-Day Rental Guarantee:

We Guarantee that we can find a quality tenant for your home in 30 business days, or the first month's management fees are FREE.

Our conditions for the 30-Day Rental Guarantee:

1. RentLife® Property Management will set the marketed rental price, which we can guarantee (the price will match the market rate analysis). The landlord can choose not to list the property at the desired price but may make their home ineligible for the Guarantee.
2. The Home must be Vacant.
3. Property must allow approved pets (maximum of 2, RentLife® Property Management Animal Restrictions Apply).
4. The home must be ready for a tenant to move in (make ready complete before listing the property for lease). Other requirements may be required due to unique property circumstances. The last thing you want to do is have your home sit on the market for 30, 60, or even 100 days. And many owners fear this may happen when renting their homes. Well, we wanted to put your minds at ease. We guarantee that we will find the right Tenant for your home within 30 business days, or your management fees will be waived for the first month. We must insist that you allow us to choose the rental price. However, you can plan on having tenants in your home within 30 business days, or the management fee is waived! Try running that by the competition!

Response Guarantee:

RentLife® Property Management strives to be readily available to our landlords and quickly respond to owners' communication. If at any time an owner is not responded to by a member of our RentLife® team within 24 business hours, the landlord will receive a credit to their account equal to that month's management fee charged.

Property Code Compliance Guarantee:

With our property code compliance guarantee, you can rest assured that your property is up to current property code requirements. We know that one of the reasons you hired a professional property manager is that you do not know all the Texas Landlord/Tenancy Codes. We are happy to be your knowledgeable and experienced property manager. We have such strict measures in place to ensure that all of our managed properties are continually up to the current Texas Property Code that we will guarantee your home will be up to code with regards to 1. Property is rekeyed between each occupancy 2. Security Devices (§92.151) 3. Smoke Alarms (§92.251) If at any time during our management of the property, there is a time that the property is not up to the current property code with regards to the sections mentioned before, RentLife® will cover the cost of correcting the missing code item and any fines associated up to \$500.00. Many

times this is caused by the Tenant where they removed an item. We will correct the code item and charge the Tenant accordingly. Landlord pays for the initial code work, misaligned, malfunctioning, and expired hardware. (Smoke Alarms expire 10 years from the Manufacture date printed on the unit, RentLife® will replace them at the owner's expense after Year 9, Deadbolts and Pin locks become misaligned over time and may need to be adjusted due to naturally occurring shifting of the property and door frames)

Leasing Fee Guarantee: (Full-Service and Premium Plans Only)

We certify that if a tenant does not fulfill at least 9 months of the initial lease term, we will find you a new tenant for Free. Now, the only exception would be a federal military relocation or any other early termination clause required by the state, which is out of anyone's control, but outside of that, we guarantee your Tenant will stay 9 months, or we will find a replacement at no additional charge.

Rental Payment Timing Guarantee: If your Tenant pays their lease rental payment in full by the 1st of the month in which it is due, our accounting team will process those funds by the 10th business day of the month, or you will receive a credit equal to that month's management fee. Processing is defined as approving the transfer from our bank. Your bank may not make the funds available by the 10th business day of the month, but they usually are available the following day

Easy Switch Guarantee: (Full-Service and Premium Plans Only)

When switching to our company from another property management firm, we will take care of all the work. We will also reduce our management fee to help ease the financial burden caused by having to pay management fees to your previous property manager or an early termination fee. This reduction in management fees would equal up to 3 months of management fees.

Vendor Guarantee:

All vendors hired by RentLife® who work on your property will be insured and licensed (when applicable) for your protection, excluding lawn service.

Spanish Guarantee:

In each of our teams, you will have someone that can assist you in your preferred language of Spanish if desired.

Pet Guarantee:

RentLife® charges the Tenant a monthly pet administrative fee per each approved pet (Advertised as "Pet Fee"). We guarantee that any damage caused to the home, above normal wear and tear, resulting from the approved pet(s) not covered by the security deposit will be reimbursed by RentLife® to make necessary repairs on behalf of the owner. This excludes any Assistance Animals per Fair Housing Guidelines. This Free Pet Guarantee is limited up to \$750 per pet (Basic Plan), \$ 1250 per pet (Full-Service Plan), and \$2,000 per pet (Premium Plan). Any

collection efforts under this provision become the sole responsibility and ownership of RentLife® Property Management.

Eviction Guarantee* : (Premium Plans Only)

As an owner-client, you can relax and let us handle everything, including one of the most significant risks a landlord may face: legal eviction fees

How can we do this?

Because our screening is so good, and our processes are so tight, we can offer you this service.

Our risk mitigation guarantee will reimburse you up to \$ 550 in legal eviction fees (to a maximum of \$550 per lease) if these costs exceed the Tenant's security deposit amount.

*Maximum payout per lease not to exceed \$550

Plan Administration / Eligibility Requirements:

The landlord's account with RentLife® Property Management must be in good standing and with no violations of the terms of the Residential Management Agreement. Termination of the Residential Management Agreement shall cause enrollment in Risk Mitigation to terminate immediately, and RentLife® Property Management shall not be responsible for any claims, either past or future.

RentLife® Property Management must have procured the resident and on a RentLife® Property Management lease agreement with a start date of February 1, 2023, or later.

If the resident defaults on the payment or rent, RentLife® Property Management will have the sole right and discretion to institute legal proceedings for eviction.

All legal fees incurred or charges will first be billed to the resident. RentLife ® Property Management will first attempt to collect funds from residents to reimburse the owner. If RentLife® Property Management does not collect these funds from residents, then RentLife® Property Management will pay these eviction expenses within the coverage limits stated above.

All amounts due from the resident for legal fees will first be deducted from the resident's security deposit, and RentLife® Property Management will pay any amount over the security deposit to the maximum payout amount. RentLife® Property Management will have a first claim position against the resident for any payment(s) recovered.

The maximum payout by RentLife® Property Management per lease agreement will not exceed \$ 550.

All payouts by RentLife® Property Management will be made after the resident has vacated the premises and after the completion of the security deposit disposition by Rentlife® Property Management.

RentLife® Property Management will retain any lease administration fees charged to the resident.

This Guarantee excludes eviction fees for any resident on any government-subsidized program, including Section 8.



ADDENDUM REGARDING RENTAL FLOOD DISCLOSURE

USE OF THIS FORM BY PERSONS WHO ARE NOT MEMBERS OF THE TEXAS ASSOCIATION OF REALTORS®, INC. IS NOT AUTHORIZED.
©Texas Association of REALTORS®, Inc. 2021.

ADDENDUM TO RESIDENTIAL LEASE CONCERNING THE PROPERTY AT _____

THIS ADDENDUM IS A DISCLOSURE OF LANDLORDS' KNOWLEDGE AS OF THE DATE SIGNED BY THE LANDLORD. IT IS NOT A WARRANTY OF ANY KIND NOR A PREDICTION OF FUTURE EVENTS BY LANDLORD, LANDLORD'S AGENTS, OR ANY OTHER AGENT.

A. 100-YEAR FLOODPLAIN. Landlord ☐ is or ☐ is not aware that the dwelling you are renting is located in a 100-year floodplain. If neither box is checked, you should assume the dwelling is in a 100-year floodplain. Even if the dwelling is not in a 100-year floodplain, the dwelling may still be susceptible to flooding. The Federal Emergency Management Agency (FEMA) maintains a flood map on its Internet website that is searchable by address, at no cost, to determine if a dwelling is located in a flood hazard area. Most tenant insurance policies do not cover damages or loss incurred in a flood. You should seek insurance coverage that would cover losses caused by a flood.

B. DAMAGE TO A DWELLING DUE TO FLOODING DURING THE LAST FIVE-YEAR PERIOD. Landlord ☐ is or ☐ is not aware that the dwelling you are renting has flooded at least once within the last five years.

**For purposes of this notice:*

"100-year floodplain" means any area of land designated as a flood hazard area with a one percent or greater chance of flooding each year by the Federal Emergency Management Agency under the National Flood Insurance Act of 1968 (42 U.S.C. Section 4001 et seq.). A landlord is not required to disclose on the notice that the landlord is aware that a dwelling is located in a 100-year floodplain if the elevation of the dwelling is raised above the 100-year floodplain flood levels in accordance with federal regulations.

"Flooding" means a general or temporary condition of partial or complete inundation of a dwelling caused by: (A) the overflow of inland or tidal waters; (B) the unusual and rapid accumulation of runoff or surface waters from any established water source such as a river, stream, or drainage ditch; or (C) excessive rainfall.

The undersigned Tenant acknowledges receipt of the foregoing notice.

Landlord Date

Tenant Date

Landlord Date

Tenant Date

Tenant Date

(TXR-2015) 1-01-22

Page 1 of 1



OWNER'S NOTICE CONCERNING CONDITION OF PROPERTY UNDER PROPERTY MANAGEMENT AGREEMENT

©Texas Association of REALTORS®, Inc. 2004

CONCERNING THE PROPERTY AT _____

OWNER IS TO COMPLETE THIS FORM TO THE BEST OF THE OWNER'S KNOWLEDGE. THIS NOTICE IS NOT A WARRANTY OF ANY KIND.

Section 1. The Property has the items marked below: (Mark Yes (Y), No (N), or Unknown (U).)

| Item | Y | N | U | Additional Information |
|---------------------------------|---|---|---|---|
| Central A/C | | | | electric ___ gas ___ heat pump number of units: _____ |
| Wall/Window AC Units | | | | number of units: _____ |
| Evaporative Coolers | | | | number of units: _____ |
| Central Heat | | | | electric ___ gas ___ heat pump number of units: _____ |
| Other Heat | | | | if yes describe: _____ |
| Fireplace & Chimney | | | | woodburning (no.) ___ mock (no.) ___ other: _____ |
| Gas Logs in Fireplace | | | | |
| Ceiling Fans | | | | number of units: _____ |
| Carport | | | | attached ___ not attached ___ |
| Garage | | | | attached ___ not attached ___ |
| Garage Door Openers | | | | number of units: _____ number of remotes: _____ |
| Fences | | | | wood ___ chain-link ___ other: _____ |
| Patio/Decking | | | | describe: _____ |
| Outdoor Grill | | | | location: _____ |
| Hot Tub/Spa | | | | |
| Pool | | | | in-ground ___ above ground / heater: ___ yes ___ no |
| Underground Lawn Sprinkler | | | | automatic ___ manual areas covered: _____ |
| Septic / On-Site Sewer Facility | | | | if yes, attach Information About On-Site Sewer Facility (TXR-1407) |
| Water Heater | | | | electric ___ gas ___ other: _____ number of units: _____ |
| Water Softener | | | | owned ___ leased from _____ |
| Washer/Dryer Hookups | | | | dryer hookups are: gas ___ electric ___ |
| Washer | | | | |
| Dryer | | | | |
| Sauna | | | | |
| Alarm System | | | | owned ___ leased from _____ |
| Smoke Alarms | | | | number of units: _____ |
| Kitchen Equipment | | | | ___ range-oven combo. ___ cooktop ___ oven ___ microwave ___ dishwasher ___ disposer ___ hood fan ___ trash compactor ___ refrigerator ___ other: _____ |

Section 2. Are you aware of any item, equipment, or system in or on the Property that is in need of repair? ___ yes ___ no If yes, explain (attach additional sheets if necessary): _____

Note: Unless instructed otherwise, items in the Property will be repaired in accordance with the repair provisions in the lease that the Broker negotiates for the Owner.

Concerning the Property at _____

Section 3. Are you aware of any of the following?

Y N

____ Owners' associations or maintenance fees or assessments. If yes, complete the following:

Name of association: _____

Manager's name: _____ Phone: _____

Address: _____

Describe the common areas or facilities (pool, tennis courts, greenbelts, etc.): _____

Are there any user fees for the common facilities? ____ yes ____ no If yes, describe: _____

Name and contact information of any other association to which the Property is subject: _____

____ Any notices of violations of deed restrictions or governmental ordinances affecting the condition or use of the Property.

____ Any lawsuits or other legal proceedings directly or indirectly affecting the Property.

____ Any condition on the Property which materially affects the health or safety of an individual.

If the answer to any of the items in Section 3 is yes, explain (attach additional sheets if necessary): _____

Section 4. Other Information.

(1) Water to the Property is supplied by: ____ city ____ MUD ____ WCID ____ co-op ____ well (location: _____)

(2) The type of roof on the Property is: ____ composition shingle ____ wood shingle ____ flat (tar & gravel) ____ metal
____ other _____ Approx. Age: _____ years

(3) If the Property is a condominium or townhome, describe parking spaces (numbers, if assigned, location): _____

(4) Describe the location and number of the mailbox: _____

(5) Provide any alarm codes, garage door codes, access codes, gate codes, common facility codes: _____

(6) Describe the location of:
heating & cooling filters: _____ filter size(s): _____

electrical breakers: _____

water shut-off valve: _____ gas shut-off valve: _____

(7) There ____ are ____ are not written warranties in effect for the Property or any appliances. Attach copies.

(8) Provide the names and phone numbers of the current providers to the Property:

Electricity: _____ Ph: _____

Gas: _____ Ph: _____

Water & Sewer: _____ Ph: _____

Telephone: _____ Ph: _____

Cable: _____ Ph: _____

Garbage: _____ Ph: _____

Pool Service: _____ Ph: _____

Alarm: _____ Ph: _____

Landscaping: _____ Ph: _____

Signature of Owner

Date

Signature of Owner

Date



OWNER'S AUTHORIZATION CONCERNING UNESCORTED ACCESS TO PROPERTY

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CONCERNING THE AGREEMENT (Check one box only):

- ☐ Residential Real Estate Listing Agreement, Exclusive Right to Lease (TXR 1102)
☐ Commercial Real Estate Listing Agreement, Exclusive Right to Lease (TXR 1302)
☒ Residential Leasing and Property Management Agreement (TXR 2201)
☐ Commercial Property Management Agreement (TXR 2202)

BETWEEN THE UNDERSIGNED PARTIES FOR THE FOLLOWING PROPERTY: _____

- A. In addition to the authority granted to Broker by Owner in the above-referenced Agreement and provided that the above-referenced Property is vacant and no personal property remains, except personal property that will remain with the Property or convey to a tenant upon execution of a lease, Broker is authorized to employ the following method to control access and verify identity of a prospective tenant in the showing of the Property: Lockbox and Identity verification

Notice: Broker should determine whether Broker's local Multiple Listing Service (MLS) rules permit the sharing of keybox codes with prospective tenants.

- B. As a result of the method employed by Broker, Owner is aware that unescorted access by a prospective tenant viewing the Property may occur and Owner consents to such unescorted access.
- C. Owner agrees Owner is responsible and liable for any damage, injury, or loss that results from any unescorted access, as specified in Paragraph B, except that which arises from Broker's own negligence, and Owner agrees to protect, defend, indemnify, and hold Broker and Broker's agents harmless from any such damage, injury, or loss, including costs, attorney's fees, and expenses.

Broker cannot give legal advice. READ THIS DOCUMENT CAREFULLY. If you do not understand the effect of this document, consult an attorney BEFORE signing.

RentLife Property Management

Broker's Printed Name **9007948** License No. Owner's Printed Name _____

☒ Broker's Signature _____ Date _____ Owner's Signature _____ Date _____
☐ Broker's Associate's Signature, as an authorized agent of Broker

Broker's Associate's Printed Name, if applicable _____ Owner's Printed Name _____

Owner's Signature _____ Date _____



GENERAL INFORMATION FOR LANDLORD REGARDING ASSISTANCE ANIMALS

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In the event you receive a reasonable accommodation request for an assistance animal, the following information may assist you in handling and evaluating such a request.

THE FAIR HOUSING ACT.

General. The federal Fair Housing Act prohibits discrimination in housing on the basis of race, color, religion, sex, national origin, familial status and disability (handicap).

Exemptions. The Fair Housing Act prohibits discrimination in most types of housing, but there are exemptions. In some circumstances, the Act exempts:

- **Owner-occupied buildings with no more than four units.** Rooms or units in dwellings containing living quarters occupied or intended to be occupied by no more than four (4) families living independently of each other, if the owner actually maintains and occupies one of such living quarters as his or her residence;
- **Single-family housing sold or rented without the use of a broker.** The sale or rental of any single-family house by an owner, provided the following conditions are met: (i) the owner does not own or have any interest in more than three single-family houses at any one time;(ii) the house is sold or rented without the use of a real estate broker, agent, or salesperson or the facilities of any person in the business of selling or renting dwellings; and (iii) if the owner selling the house does not reside in it at the time of the sale or was not the most recent resident of the house prior to such sale, the exemption applies only to one such sale in any 24-month period.
- **Housing operated by certain organizations and private clubs that limit occupancy to members.** See 42 U.S.C. 3603, 3607 and 24 C.F.R. § 100.10 for more details.

Enforcement. At the federal level, the U.S. Department of Housing and Urban Development (HUD) administers and enforces the federal Fair Housing Act. The Fair Housing Act provides that if the state or city has adopted similar fair housing laws, fair housing complaints will be referred to the state or city for enforcement. At the state level, the Texas Workforce Commission, Civil Rights Division, administers and enforces the Texas Fair Housing Act, which is virtually identical to the federal act.

DEFINITIONS.

Assistance Animal. An assistance animal is an animal that works, provides assistance, or performs tasks for the benefit of a person with a disability, or provides emotional support that alleviates one or more identified symptoms or effects of a person's disability. An assistance animal is not considered a pet. Under the Fair Housing Act, assistance animals include service animals, which are always dogs, and emotional support animals. Emotional support animals can be any type of animal.

Disability. Under the Fair Housing Act, "disability" or "handicap" means a person with physical or mental impairment which substantially limits one or more of a person's major life activities, a record (history) of the impairment, or being regarded as having the impairment.

Major Life Activities. "Major life activities" means functions such as caring for one's self, performing manual tasks, walking, seeing, hearing, speaking, breathing, learning, and working.

REASONABLE ACCOMMODATION. Discrimination against a person with a disability includes refusing to make a reasonable accommodation in rules, policies, practices, or services, when

such accommodations may be necessary to afford a person with a disability equal opportunity to use and enjoy a dwelling.

If you prohibit pets in your rental property or impose other restrictions or conditions related to pets and other animals, a reasonable accommodation request may include a request to live with and use an assistance animal.

Generally, such a request must be granted, unless: (i) the person seeking to use and live with the animal does not have a disability; (ii) the person seeking to use and live with the animal does not have a disability-related need for the assistance animal; (iii) the request would impose an undue financial and administrative burden on you; (iv) the request would fundamentally alter the nature of your operations; (v) the specific assistance animal in question poses a direct threat to the health or safety of others that cannot be reduced or eliminated by another reasonable accommodation; or (vi) the specific assistance animal in question would cause substantial physical damage to the property of others that cannot be reduced or eliminated by another reasonable accommodation. If you refuse a requested accommodation for one of these reasons, you should discuss with the person whether there is an alternative reasonable accommodation that would effectively address the person's disability-related needs.

REQUESTING ADDITIONAL INFORMATION. Once a reasonable accommodation request has been made, you may be able to ask for additional information; however, this depends on whether the person's disability or the disability-related need for the assistance animal is readily apparent or known.

- **If the person's disability is obvious, or otherwise known to you, and if the need for the requested accommodation is also readily apparent and known**, then you may not request any additional information about the person's disability or the need for the accommodation.
- **If the person's disability is known or readily apparent, but the need for the accommodation is not readily apparent or known**, you may request only information that is necessary to evaluate the disability-related need for the accommodation. For example, a licensed health care professional with personal knowledge of the individual may provide a note confirming a need for an animal. The health care professionals' services may be delivered remotely, including the over the internet.
- **If a disability is not obvious**, you may request reliable disability-related information that: (i) is necessary to verify that the person meets the Fair Housing Act's definition of disability; (ii) describes the needed accommodation; and (iii) shows the relationship between the person's disability and the need for the requested accommodation.

Information a landlord can request as the basis for supporting a non-observable disability can include: a determination of disability from a governmental authority, the receipt of disability benefits or services (i.e., SSDI, Medicare, or SSI for a person under 65, veteran's benefits, etc.), eligibility for housing assistance or housing vouchers received because of disability; or information confirming disability from a health care professional. You may not ask an applicant or tenant to provide access to medical records or medical providers, or provide detailed or extensive information or documentation of a person's physical or mental impairments.

INTERNET CERTIFICATIONS. HUD states that websites which sell certificates, registrations, and licensing documents for assistance animals are not sufficient on their own to reliably establish that an individual has a disability-related need for an emotional support animal. Instead,

HUD recommends that the documentation should include the patient's name, whether there is a professional relationship between the healthcare professional and the patient, and the type of animal(s) for which the reasonable accommodation is sought. The documentation should also include information addressing the requestor's disability: whether the patient has a physical or mental impairment, whether that impairment substantially limits at least one major life activity or major bodily function, and how the patient will be aided by the animal(s).

PET DEPOSITS OR OTHER PET FEES. Any required pet fees, like a pet deposit, may not be applied to assistance animals. A reasonable accommodation request for an assistance animal cannot be conditioned on the payment of such a fee. However, the person is responsible for any damage to the property caused by the assistance animal, excluding normal wear and tear, and all reasonable costs associated to repair the property, if this is your practice to assess tenants for any damage they cause.

UNIQUE ANIMALS. If the animal being considered is a dog, cat, small bird, rabbit, hamster, gerbil, other rodent, fish, turtle, or other small, domesticated animal that is traditionally kept in the home for pleasure rather than for commercial purposes, then the reasonable accommodation should be granted if the landlord has information confirming that there is a disability-related need for the animal.

However, if the animal is “unique”, like a monkey or snake, then the tenant has a burden to demonstrate a disability-related therapeutic need for the specific animal or the specific type of animal. There may be reasons that require a unique animal such as opposable thumbs on a monkey or allergies to dogs. Landlords should consider the request and documentation provided.

BREED, SIZE, AND WEIGHT RESTRICTIONS. Breed, size, and weight restrictions do not apply to assistance animal. A decision that an assistance animal poses a direct threat of harm to others or would cause substantial physical damage to the property of others must be based on that animal's actual conduct and not simply on (i) fear about harm or damage an animal may cause or (ii) evidence of harm or damage other animals have caused.

INSURANCE POLICY. In some cases, an insurance policy may contain restrictions, conditions, or prohibitions on the types of animals or breeds in a property. If a request for an assistance animal in your property would violate your insurance policy, this may entitle you to refuse the request. If your insurance carrier would either cancel the insurance policy, substantially increase the costs of the insurance policy, or adversely change the policy terms because of the presence of a certain breed of dog or a certain animal, HUD will find that this imposes an undue financial and administrative burden. However, the HUD investigator will verify such a claim with the insurance company directly and consider whether comparable insurance, without the restriction, is available in the market.

Broker cannot give legal advice. In the event you need further information or wish to deny a request for an assistance animal, you should CONSULT AN ATTORNEY.

This form was provided by:

By signing below I acknowledge that I received,
read, and understand this information.

RentLife Property Management

Broker's Printed Name

Landlord

Date

By: _____

Broker's Associate's Signature

Date

Mark A. Kallus

Landlord

Date



ADDENDUM REGARDING LEAD-BASED PAINT

For use in the lease of residential property built before 1978.

ADDENDUM TO RESIDENTIAL LEASE CONCERNING THE PROPERTY AT _____

A. LEAD WARNING STATEMENT: Housing built before 1978 may contain lead-based paint. Lead from paint, paint chips, and dust can pose health hazards if not managed properly. Lead exposure is especially harmful to young children and pregnant women. Before renting pre-1978 housing, lessors (landlords) must disclose the presence of known lead-based paint and/or lead-based paint hazards in the dwelling. Lessees (tenants) must also receive a federally approved pamphlet on lead poisoning prevention.

B. DISCLOSURE:

(1) Presence of lead-based paint and/or lead-based paint hazards. (Check (a) or (b)).

☐ (a) Landlord knows of the following lead-based paint and/or lead-based paint hazards in the Property: _____

☒ (b) Landlord has no knowledge of lead-based paint and/or lead-based paint hazards in the Property.

(2) Records and reports available to Landlord. (Check (a) or (b)).

☐ (a) Landlord has provided Tenant with all available records and reports pertaining to lead-based paint and/or lead-based paint hazards in the Property which are listed here: _____

☒ (b) Landlord has no reports or records pertaining to lead-based paint and/or lead-based paint hazards in the Property.

C. TENANT'S ACKNOWLEDGEMENT:

- ☐ (1) Tenant has received copies of all information listed in Paragraph B.
☒ (2) Tenant has received the pamphlet entitled Protect Your Family from Lead in Your Home.

D. AGENTS' NOTICE TO LANDLORD AND ACKNOWLEDGEMENT:

- (1) The brokers and agents to the lease notify Landlord that Landlord must: (a) provide Tenant with the EPA-approved pamphlet on lead poisoning prevention; (b) complete this addendum; (c) disclose any known lead-based paint and/or lead-based paint hazard in the Property; (d) deliver all records and reports to Tenant pertaining lead-based paint and/or lead-based paint hazards in the Property; and (e) retain a copy of this addendum for at least 3 years.
(2) The brokers and agents to the lease have advised Landlord of Landlord's obligations under 42 U.S.C. 4852d and are aware of his/her responsibility to ensure compliance.

E. CERTIFICATION OF ACCURACY: The undersigned have reviewed the information above and certify, to the best of their knowledge, that the information they have provided is true and correct.

Landlord Date

Tenant Date

Landlord Date

Tenant Date

Listing Broker/Agent or Property Manager Date
RentLife Property Management

Tenant Date

Other Broker/Agent Date

Tenant Date



Keeping Your HOA Updated

A common but costly mistake that homeowners and investors make is failing to update their mailing address with the Home Owners Association (HOA).

If your property is in a Mandatory Home Owners Association (HOA), you should personally contact the HOA and make sure that they have your current mailing address and phone number every time you move.

HOA's can charge large fines if HOA fees are not paid, are late, or if HOA violations go unanswered. HOA's in San Antonio have even foreclosed on properties where the owner did not pay the HOA dues or cure a violation of their property simply because the HOA was uninformed of the owner's current mailing address.

Unfortunately, filling out our HOA addendum is not enough. Many HOA's will not recognize our HOA addendum even though it was signed by the owner of the property simply because of the way the HOA rules and laws are set up. Most HOAs will only talk to or deal directly with the owner of the property.

The importance of complying with the community covenants and restrictions has been made clear by the Texas Legislature in the 1987 statute, which states that the community association covenants and restrictions will be liberally rather than narrowly construed or interpreted. The Law also allows a judge to fine someone in violation of up to \$200 per day from the day the violation began, plus court costs and attorney's fees.

If the HOA does not have the owner's current mailing address, they will mail the HOA dues invoices and violation notices directly to the rental property. Some tenants notify us, and a few even bring the notices into our office, but most do not. As a result, owners can get charged with huge late fees, attorney fees, and could end up facing possible foreclosure.

All because the HOA does not have the owner's current contact information on file.

It is the owner's responsibility, not the management company, to make sure your HOA has your current contact information.

If you do not know the contact information for your HOA, please call or email us, and we will help you look it up. We do not like seeing any owner pay unnecessary fees that could have been avoided if they only had kept their mailing address updated with the HOA.

We strongly recommend that owners have their HOA notices and invoices sent to them in order to avoid the possibility of large fines, fees, or other legal issues that can arise.

Once you receive an HOA notice or invoice, you can forward it to us for action or be paid from your account, provided that there are sufficient funds in your account to cover the amount due.

Owner I

Date

Owner II

Date



ADDENDUM FOR AUTHORIZATION TO ACT FOR OWNER BEFORE OWNERS' ASSOCIATION

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ADDENDUM TO LEASING AND MANAGEMENT AGREEMENT BETWEEN THE UNDERSIGNED PARTIES CONCERNING THE PROPERTY AT _____

- A. Ownership of the above-referenced Property entitles Owner to membership in the _____ (Association).
The contact information of the manager for the Association is _____
_____.
- B. Owner will provide Broker copies of all Association documents in Owners' possession.
- C. Owner grants to Broker the sole and exclusive right and authority to act on Owner's behalf and appoints Broker as Owner's attorney-in-fact to act as Owner's agent in all matters dealing with or in any way connected with the Association relating to the above-referenced Property, including but not limited to, the right to:
- (1) negotiate agreements;
 - (2) request and receive from the Association, its officers, directors, or management all information, accounting, and documents to which Owner may be entitled;
 - (3) vote in person or by proxy on all matters that may arise affecting the Property related to the Association;
 - (4) instruct the Association where to send notices and correspondence (including instructions to send notices to the Owner at Owner's address or to broker or to both), which as of this date, Owner instructs Association to send notices and correspondence to: **Both, RentLife Property Management at 14010 Alice Road, Tomball, Texas 77377 Phone: 832-562-3600, Fax: 832-562-3333** ; and
 - (5) advise the Association of this agreement and of any lease of the Property.

Except as expressly provided, this addendum does not obligate Broker to attend Association meetings.

- D. Owner is responsible for payment of all mandatory assessments or fees payable to the Association.
- ☒ (1) Owner will remit any fees or assessments payable to the Association.
- ☐ (2) Broker will remit any fees or assessments payable to the Association from funds Broker receives in trust for Owner.
- E. Special Provisions: **The owner will pay the HOA fee; The tenant will pay any additional user fees. If possible, please send violation notices to both the property Owner and the Property Management Company: RentLife Property Management.**

RentLife Property Management

Broker's Printed Name _____ Date _____

By: _____

Broker's Associate's Signature

Mark A. Kallus

Owner _____ Date _____

By: _____

Owner _____ Date _____

By: _____



PayLease Inc.
5790 Miramar Rd.
Suite 201
San Diego, CA 92121

Toll Free: (866) Pay-Lease
Phone: (858) 657-9391
Fax: (866) 492-2883
E-mail: support@paylease.com

Direct Deposit for Owners/Vendors

RentLife® Property Management

***Name of Management Company:** _____

Check One of the Following: ☒ New Enrollment ☐ Add or Change Checking Account

Company/Individual Name Telephone # E-mail Address

Address City State Zip

Bank Name Routing Number (9 digits) Checking Account #

The image shows a check sample with the following fields labeled below it:

- Routing Number:** Points to the routing number field (122105278).
- Account Number:** Points to the account number field (6724301068).
- Check Number:** Points to the check number field (2400).
- Fractional Number:** Points to the fractional number field (2400).

The check itself contains the following information:

- Payable to: Your Company, Inc.
- Address: 1234 Street Address, YourCity, CA 38645
- Amount: 2400
- Routing Number: 91-548/1221
- Check Number: 2400

***Please attach a voided check to top of check sample above**

****Please make sure a voided check from the account is given and not a deposit slip**

I hereby authorize PayLease Inc. to deposit any amounts owed to me, as instructed by the Management Company listed above, by initiating credit entries to my account at the financial institution indicated on this form. In the event that PayLease deposits funds erroneously into my account, I authorize PayLease to debit my account for an amount not to exceed the original amount of the erroneous credit.

Owner/Vendor:

Print Name

Signature

Date

***Please Fax or Mail this form to your Property Management Company to be set up**

Request for Taxpayer Identification Number and Certification

Give Form to the
requester. Do not
send to the IRS.

► Go to www.irs.gov/FormW9 for instructions and the latest information.

| | | |
|--|---|---|
| Print or type. See Specific Instructions on page 3. | 1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. | |
| | 2 Business name/disregarded entity name, if different from above | |
| | 3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes. <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ► _____ Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner. <input type="checkbox"/> Other (see instructions) ► _____ | 4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ <i>(Applies to accounts maintained outside the U.S.)</i> |
| | 5 Address (number, street, and apt. or suite no.) See instructions. | Requester's name and address (optional) |
| | 6 City, state, and ZIP code | |
| | 7 List account number(s) here (optional) | |

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

| | | | | | | | | | |
|--------------------------------|--|--|--|---|--|--|--|---|--|
| Social security number | | | | | | | | | |
| | | | | - | | | | - | |
| or | | | | | | | | | |
| Employer identification number | | | | | | | | | |
| | | | | - | | | | | |

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

| | | |
|-----------|----------------------------|--------|
| Sign Here | Signature of U.S. person ► | Date ► |
|-----------|----------------------------|--------|

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.

By signing the filled-out form, you:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
2. Certify that you are not subject to backup withholding, or
3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income, and
4. Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting, is correct. See *What is FATCA reporting*, later, for further information.

Note: If you are a U.S. person and a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

Definition of a U.S. person. For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien;
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States;
- An estate (other than a foreign estate); or
- A domestic trust (as defined in Regulations section 301.7701-7).

Special rules for partnerships. Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax under section 1446 on any foreign partners' share of effectively connected taxable income from such business. Further, in certain cases where a Form W-9 has not been received, the rules under section 1446 require a partnership to presume that a partner is a foreign person, and pay the section 1446 withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid section 1446 withholding on your share of partnership income.

In the cases below, the following person must give Form W-9 to the partnership for purposes of establishing its U.S. status and avoiding withholding on its allocable share of net income from the partnership conducting a trade or business in the United States.

- In the case of a disregarded entity with a U.S. owner, the U.S. owner of the disregarded entity and not the entity;
- In the case of a grantor trust with a U.S. grantor or other U.S. owner, generally, the U.S. grantor or other U.S. owner of the grantor trust and not the trust; and
- In the case of a U.S. trust (other than a grantor trust), the U.S. trust (other than a grantor trust) and not the beneficiaries of the trust.

Foreign person. If you are a foreign person or the U.S. branch of a foreign bank that has elected to be treated as a U.S. person, do not use Form W-9. Instead, use the appropriate Form W-8 or Form 8233 (see Pub. 515, *Withholding of Tax on Nonresident Aliens and Foreign Entities*).

Nonresident alien who becomes a resident alien. Generally, only a nonresident alien individual may use the terms of a tax treaty to reduce or eliminate U.S. tax on certain types of income. However, most tax treaties contain a provision known as a "saving clause." Exceptions specified in the saving clause may permit an exemption from tax to continue for certain types of income even after the payee has otherwise become a U.S. resident alien for tax purposes.

If you are a U.S. resident alien who is relying on an exception contained in the saving clause of a tax treaty to claim an exemption from U.S. tax on certain types of income, you must attach a statement to Form W-9 that specifies the following five items.

1. The treaty country. Generally, this must be the same treaty under which you claimed exemption from tax as a nonresident alien.
2. The treaty article addressing the income.
3. The article number (or location) in the tax treaty that contains the saving clause and its exceptions.
4. The type and amount of income that qualifies for the exemption from tax.
5. Sufficient facts to justify the exemption from tax under the terms of the treaty article.

Example. Article 20 of the U.S.-China income tax treaty allows an exemption from tax for scholarship income received by a Chinese student temporarily present in the United States. Under U.S. law, this student will become a resident alien for tax purposes if his or her stay in the United States exceeds 5 calendar years. However, paragraph 2 of the first Protocol to the U.S.-China treaty (dated April 30, 1984) allows the provisions of Article 20 to continue to apply even after the Chinese student becomes a resident alien of the United States. A Chinese student who qualifies for this exception (under paragraph 2 of the first protocol) and is relying on this exception to claim an exemption from tax on his or her scholarship or fellowship income would attach to Form W-9 a statement that includes the information described above to support that exemption.

If you are a nonresident alien or a foreign entity, give the requester the appropriate completed Form W-8 or Form 8233.

Backup Withholding

What is backup withholding? Persons making certain payments to you must under certain conditions withhold and pay to the IRS 24% of such payments. This is called "backup withholding." Payments that may be subject to backup withholding include interest, tax-exempt interest, dividends, broker and barter exchange transactions, rents, royalties, nonemployee pay, payments made in settlement of payment card and third party network transactions, and certain payments from fishing boat operators. Real estate transactions are not subject to backup withholding.

You will not be subject to backup withholding on payments you receive if you give the requester your correct TIN, make the proper certifications, and report all your taxable interest and dividends on your tax return.

Payments you receive will be subject to backup withholding if:

1. You do not furnish your TIN to the requester,
2. You do not certify your TIN when required (see the instructions for Part II for details),
3. The IRS tells the requester that you furnished an incorrect TIN,
4. The IRS tells you that you are subject to backup withholding because you did not report all your interest and dividends on your tax return (for reportable interest and dividends only), or
5. You do not certify to the requester that you are not subject to backup withholding under 4 above (for reportable interest and dividend accounts opened after 1983 only).

Certain payees and payments are exempt from backup withholding. See *Exempt payee code*, later, and the separate Instructions for the Requester of Form W-9 for more information.

Also see *Special rules for partnerships*, earlier.

What is FATCA Reporting?

The Foreign Account Tax Compliance Act (FATCA) requires a participating foreign financial institution to report all United States account holders that are specified United States persons. Certain payees are exempt from FATCA reporting. See *Exemption from FATCA reporting code*, later, and the Instructions for the Requester of Form W-9 for more information.

Updating Your Information

You must provide updated information to any person to whom you claimed to be an exempt payee if you are no longer an exempt payee and anticipate receiving reportable payments in the future from this person. For example, you may need to provide updated information if you are a C corporation that elects to be an S corporation, or if you no longer are tax exempt. In addition, you must furnish a new Form W-9 if the name or TIN changes for the account; for example, if the grantor of a grantor trust dies.

Penalties

Failure to furnish TIN. If you fail to furnish your correct TIN to a requester, you are subject to a penalty of \$50 for each such failure unless your failure is due to reasonable cause and not to willful neglect.

Civil penalty for false information with respect to withholding. If you make a false statement with no reasonable basis that results in no backup withholding, you are subject to a \$500 penalty.

Criminal penalty for falsifying information. Willfully falsifying certifications or affirmations may subject you to criminal penalties including fines and/or imprisonment.

Misuse of TINs. If the requester discloses or uses TINs in violation of federal law, the requester may be subject to civil and criminal penalties.

Specific Instructions

Line 1

You must enter one of the following on this line; **do not** leave this line blank. The name should match the name on your tax return.

If this Form W-9 is for a joint account (other than an account maintained by a foreign financial institution (FFI)), list first, and then circle, the name of the person or entity whose number you entered in Part I of Form W-9. If you are providing Form W-9 to an FFI to document a joint account, each holder of the account that is a U.S. person must provide a Form W-9.

a. **Individual.** Generally, enter the name shown on your tax return. If you have changed your last name without informing the Social Security Administration (SSA) of the name change, enter your first name, the last name as shown on your social security card, and your new last name.

Note: ITIN applicant: Enter your individual name as it was entered on your Form W-7 application, line 1a. This should also be the same as the name you entered on the Form 1040/1040A/1040EZ you filed with your application.

b. **Sole proprietor or single-member LLC.** Enter your individual name as shown on your 1040/1040A/1040EZ on line 1. You may enter your business, trade, or "doing business as" (DBA) name on line 2.

c. **Partnership, LLC that is not a single-member LLC, C corporation, or S corporation.** Enter the entity's name as shown on the entity's tax return on line 1 and any business, trade, or DBA name on line 2.

d. **Other entities.** Enter your name as shown on required U.S. federal tax documents on line 1. This name should match the name shown on the charter or other legal document creating the entity. You may enter any business, trade, or DBA name on line 2.

e. **Disregarded entity.** For U.S. federal tax purposes, an entity that is disregarded as an entity separate from its owner is treated as a "disregarded entity." See Regulations section 301.7701-2(c)(2)(iii). Enter the owner's name on line 1. The name of the entity entered on line 1 should never be a disregarded entity. The name on line 1 should be the name shown on the income tax return on which the income should be reported. For example, if a foreign LLC that is treated as a disregarded entity for U.S. federal tax purposes has a single owner that is a U.S. person, the U.S. owner's name is required to be provided on line 1. If the direct owner of the entity is also a disregarded entity, enter the first owner that is not disregarded for federal tax purposes. Enter the disregarded entity's name on line 2, "Business name/disregarded entity name." If the owner of the disregarded entity is a foreign person, the owner must complete an appropriate Form W-8 instead of a Form W-9. This is the case even if the foreign person has a U.S. TIN.

Line 2

If you have a business name, trade name, DBA name, or disregarded entity name, you may enter it on line 2.

Line 3

Check the appropriate box on line 3 for the U.S. federal tax classification of the person whose name is entered on line 1. Check only one box on line 3.

| IF the entity/person on line 1 is a(n) . . . | THEN check the box for . . . |
|--|---|
| • Corporation | Corporation |
| • Individual • Sole proprietorship, or • Single-member limited liability company (LLC) owned by an individual and disregarded for U.S. federal tax purposes. | Individual/sole proprietor or single-member LLC |
| • LLC treated as a partnership for U.S. federal tax purposes, • LLC that has filed Form 8832 or 2553 to be taxed as a corporation, or • LLC that is disregarded as an entity separate from its owner but the owner is another LLC that is not disregarded for U.S. federal tax purposes. | Limited liability company and enter the appropriate tax classification. (P= Partnership; C= C corporation; or S= S corporation) |
| • Partnership | Partnership |
| • Trust/estate | Trust/estate |

Line 4, Exemptions

If you are exempt from backup withholding and/or FATCA reporting, enter in the appropriate space on line 4 any code(s) that may apply to you.

Exempt payee code.

- Generally, individuals (including sole proprietors) are not exempt from backup withholding.
- Except as provided below, corporations are exempt from backup withholding for certain payments, including interest and dividends.
- Corporations are not exempt from backup withholding for payments made in settlement of payment card or third party network transactions.
- Corporations are not exempt from backup withholding with respect to attorneys' fees or gross proceeds paid to attorneys, and corporations that provide medical or health care services are not exempt with respect to payments reportable on Form 1099-MISC.

The following codes identify payees that are exempt from backup withholding. Enter the appropriate code in the space in line 4.

- 1—An organization exempt from tax under section 501(a), any IRA, or a custodial account under section 403(b)(7) if the account satisfies the requirements of section 401(f)(2)
- 2—The United States or any of its agencies or instrumentalities
- 3—A state, the District of Columbia, a U.S. commonwealth or possession, or any of their political subdivisions or instrumentalities
- 4—A foreign government or any of its political subdivisions, agencies, or instrumentalities
- 5—A corporation
- 6—A dealer in securities or commodities required to register in the United States, the District of Columbia, or a U.S. commonwealth or possession
- 7—A futures commission merchant registered with the Commodity Futures Trading Commission
- 8—A real estate investment trust
- 9—An entity registered at all times during the tax year under the Investment Company Act of 1940
- 10—A common trust fund operated by a bank under section 584(a)
- 11—A financial institution
- 12—A middleman known in the investment community as a nominee or custodian
- 13—A trust exempt from tax under section 664 or described in section 4947

The following chart shows types of payments that may be exempt from backup withholding. The chart applies to the exempt payees listed above, 1 through 13.

| IF the payment is for . . . | THEN the payment is exempt for . . . |
|--|---|
| Interest and dividend payments | All exempt payees except for 7 |
| Broker transactions | Exempt payees 1 through 4 and 6 through 11 and all C corporations. S corporations must not enter an exempt payee code because they are exempt only for sales of noncovered securities acquired prior to 2012. |
| Barter exchange transactions and patronage dividends | Exempt payees 1 through 4 |
| Payments over \$600 required to be reported and direct sales over \$5,000 ¹ | Generally, exempt payees 1 through 5 ² |
| Payments made in settlement of payment card or third party network transactions | Exempt payees 1 through 4 |

¹ See Form 1099-MISC, Miscellaneous Income, and its instructions.

² However, the following payments made to a corporation and reportable on Form 1099-MISC are not exempt from backup withholding: medical and health care payments, attorneys' fees, gross proceeds paid to an attorney reportable under section 6045(f), and payments for services paid by a federal executive agency.

Exemption from FATCA reporting code. The following codes identify payees that are exempt from reporting under FATCA. These codes apply to persons submitting this form for accounts maintained outside of the United States by certain foreign financial institutions. Therefore, if you are only submitting this form for an account you hold in the United States, you may leave this field blank. Consult with the person requesting this form if you are uncertain if the financial institution is subject to these requirements. A requester may indicate that a code is not required by providing you with a Form W-9 with "Not Applicable" (or any similar indication) written or printed on the line for a FATCA exemption code.

A—An organization exempt from tax under section 501(a) or any individual retirement plan as defined in section 7701(a)(37)

B—The United States or any of its agencies or instrumentalities

C—A state, the District of Columbia, a U.S. commonwealth or possession, or any of their political subdivisions or instrumentalities

D—A corporation the stock of which is regularly traded on one or more established securities markets, as described in Regulations section 1.1472-1(c)(1)(i)

E—A corporation that is a member of the same expanded affiliated group as a corporation described in Regulations section 1.1472-1(c)(1)(i)

F—A dealer in securities, commodities, or derivative financial instruments (including notional principal contracts, futures, forwards, and options) that is registered as such under the laws of the United States or any state

G—A real estate investment trust

H—A regulated investment company as defined in section 851 or an entity registered at all times during the tax year under the Investment Company Act of 1940

I—A common trust fund as defined in section 584(a)

J—A bank as defined in section 581

K—A broker

L—A trust exempt from tax under section 664 or described in section 4947(a)(1)

M—A tax exempt trust under a section 403(b) plan or section 457(g) plan

Note: You may wish to consult with the financial institution requesting this form to determine whether the FATCA code and/or exempt payee code should be completed.

Line 5

Enter your address (number, street, and apartment or suite number). This is where the requester of this Form W-9 will mail your information returns. If this address differs from the one the requester already has on file, write NEW at the top. If a new address is provided, there is still a chance the old address will be used until the payor changes your address in their records.

Line 6

Enter your city, state, and ZIP code.

Part I. Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. If you are a resident alien and you do not have and are not eligible to get an SSN, your TIN is your IRS individual taxpayer identification number (ITIN). Enter it in the social security number box. If you do not have an ITIN, see *How to get a TIN* below.

If you are a sole proprietor and you have an EIN, you may enter either your SSN or EIN.

If you are a single-member LLC that is disregarded as an entity separate from its owner, enter the owner's SSN (or EIN, if the owner has one). Do not enter the disregarded entity's EIN. If the LLC is classified as a corporation or partnership, enter the entity's EIN.

Note: See *What Name and Number To Give the Requester*, later, for further clarification of name and TIN combinations.

How to get a TIN. If you do not have a TIN, apply for one immediately. To apply for an SSN, get Form SS-5, Application for a Social Security Card, from your local SSA office or get this form online at www.SSA.gov. You may also get this form by calling 1-800-772-1213. Use Form W-7, Application for IRS Individual Taxpayer Identification Number, to apply for an ITIN, or Form SS-4, Application for Employer Identification Number, to apply for an EIN. You can apply for an EIN online by accessing the IRS website at www.irs.gov/Businesses and clicking on Employer Identification Number (EIN) under Starting a Business. Go to www.irs.gov/Forms to view, download, or print Form W-7 and/or Form SS-4. Or, you can go to www.irs.gov/OrderForms to place an order and have Form W-7 and/or SS-4 mailed to you within 10 business days.

If you are asked to complete Form W-9 but do not have a TIN, apply for a TIN and write "Applied For" in the space for the TIN, sign and date the form, and give it to the requester. For interest and dividend payments, and certain payments made with respect to readily tradable instruments, generally you will have 60 days to get a TIN and give it to the requester before you are subject to backup withholding on payments. The 60-day rule does not apply to other types of payments. You will be subject to backup withholding on all such payments until you provide your TIN to the requester.

Note: Entering "Applied For" means that you have already applied for a TIN or that you intend to apply for one soon.

Caution: A disregarded U.S. entity that has a foreign owner must use the appropriate Form W-8.

Part II. Certification

To establish to the withholding agent that you are a U.S. person, or resident alien, sign Form W-9. You may be requested to sign by the withholding agent even if item 1, 4, or 5 below indicates otherwise.

For a joint account, only the person whose TIN is shown in Part I should sign (when required). In the case of a disregarded entity, the person identified on line 1 must sign. Exempt payees, see *Exempt payee code*, earlier.

Signature requirements. Complete the certification as indicated in items 1 through 5 below.

1. Interest, dividend, and barter exchange accounts opened before 1984 and broker accounts considered active during 1983.

You must give your correct TIN, but you do not have to sign the certification.

2. Interest, dividend, broker, and barter exchange accounts opened after 1983 and broker accounts considered inactive during 1983. You must sign the certification or backup withholding will apply. If you are subject to backup withholding and you are merely providing your correct TIN to the requester, you must cross out item 2 in the certification before signing the form.

3. Real estate transactions. You must sign the certification. You may cross out item 2 of the certification.

4. Other payments. You must give your correct TIN, but you do not have to sign the certification unless you have been notified that you have previously given an incorrect TIN. "Other payments" include payments made in the course of the requester's trade or business for rents, royalties, goods (other than bills for merchandise), medical and health care services (including payments to corporations), payments to a nonemployee for services, payments made in settlement of payment card and third party network transactions, payments to certain fishing boat crew members and fishermen, and gross proceeds paid to attorneys (including payments to corporations).

5. Mortgage interest paid by you, acquisition or abandonment of secured property, cancellation of debt, qualified tuition program payments (under section 529), ABLE accounts (under section 529A), IRA, Coverdell ESA, Archer MSA or HSA contributions or distributions, and pension distributions. You must give your correct TIN, but you do not have to sign the certification.

What Name and Number To Give the Requester

| For this type of account: | Give name and SSN of: |
|--|---|
| 1. Individual | The individual |
| 2. Two or more individuals (joint account) other than an account maintained by an FFI | The actual owner of the account or, if combined funds, the first individual on the account ¹ |
| 3. Two or more U.S. persons (joint account maintained by an FFI) | Each holder of the account |
| 4. Custodial account of a minor (Uniform Gift to Minors Act) | The minor ² |
| 5. a. The usual revocable savings trust (grantor is also trustee) | The grantor-trustee ¹ |
| b. So-called trust account that is not a legal or valid trust under state law | The actual owner ¹ |
| 6. Sole proprietorship or disregarded entity owned by an individual | The owner ³ |
| 7. Grantor trust filing under Optional Form 1099 Filing Method 1 (see Regulations section 1.671-4(b)(2)(i)(A)) | The grantor* |
| For this type of account: | Give name and EIN of: |
| 8. Disregarded entity not owned by an individual | The owner |
| 9. A valid trust, estate, or pension trust | Legal entity ⁴ |
| 10. Corporation or LLC electing corporate status on Form 8832 or Form 2553 | The corporation |
| 11. Association, club, religious, charitable, educational, or other tax-exempt organization | The organization |
| 12. Partnership or multi-member LLC | The partnership |
| 13. A broker or registered nominee | The broker or nominee |

| For this type of account: | Give name and EIN of: |
|---|-----------------------|
| 14. Account with the Department of Agriculture in the name of a public entity (such as a state or local government, school district, or prison) that receives agricultural program payments | The public entity |
| 15. Grantor trust filing under the Form 1041 Filing Method or the Optional Form 1099 Filing Method 2 (see Regulations section 1.671-4(b)(2)(i)(B)) | The trust |

¹ List first and circle the name of the person whose number you furnish. If only one person on a joint account has an SSN, that person's number must be furnished.

² Circle the minor's name and furnish the minor's SSN.

³ You must show your individual name and you may also enter your business or DBA name on the "Business name/disregarded entity" name line. You may use either your SSN or EIN (if you have one), but the IRS encourages you to use your SSN.

⁴ List first and circle the name of the trust, estate, or pension trust. (Do not furnish the TIN of the personal representative or trustee unless the legal entity itself is not designated in the account title.) Also see *Special rules for partnerships*, earlier.

***Note:** The grantor also must provide a Form W-9 to trustee of trust.

Note: If no name is circled when more than one name is listed, the number will be considered to be that of the first name listed.

Secure Your Tax Records From Identity Theft

Identity theft occurs when someone uses your personal information such as your name, SSN, or other identifying information, without your permission, to commit fraud or other crimes. An identity thief may use your SSN to get a job or may file a tax return using your SSN to receive a refund.

To reduce your risk:

- Protect your SSN,
- Ensure your employer is protecting your SSN, and
- Be careful when choosing a tax preparer.

If your tax records are affected by identity theft and you receive a notice from the IRS, respond right away to the name and phone number printed on the IRS notice or letter.

If your tax records are not currently affected by identity theft but you think you are at risk due to a lost or stolen purse or wallet, questionable credit card activity or credit report, contact the IRS Identity Theft Hotline at 1-800-908-4490 or submit Form 14039.

For more information, see Pub. 5027, Identity Theft Information for Taxpayers.

Victims of identity theft who are experiencing economic harm or a systemic problem, or are seeking help in resolving tax problems that have not been resolved through normal channels, may be eligible for Taxpayer Advocate Service (TAS) assistance. You can reach TAS by calling the TAS toll-free case intake line at 1-877-777-4778 or TTY/TDD 1-800-829-4059.

Protect yourself from suspicious emails or phishing schemes.

Phishing is the creation and use of email and websites designed to mimic legitimate business emails and websites. The most common act is sending an email to a user falsely claiming to be an established legitimate enterprise in an attempt to scam the user into surrendering private information that will be used for identity theft.

The IRS does not initiate contacts with taxpayers via emails. Also, the IRS does not request personal detailed information through email or ask taxpayers for the PIN numbers, passwords, or similar secret access information for their credit card, bank, or other financial accounts.

If you receive an unsolicited email claiming to be from the IRS, forward this message to phishing@irs.gov. You may also report misuse of the IRS name, logo, or other IRS property to the Treasury Inspector General for Tax Administration (TIGTA) at 1-800-366-4484. You can forward suspicious emails to the Federal Trade Commission at spam@uce.gov or report them at www.ftc.gov/complaint. You can contact the FTC at www.ftc.gov/idtheft or 877-IDTHEFT (877-438-4338). If you have been the victim of identity theft, see www.IdentityTheft.gov and Pub. 5027.

Visit www.irs.gov/IdentityTheft to learn more about identity theft and how to reduce your risk.

Privacy Act Notice

Section 6109 of the Internal Revenue Code requires you to provide your correct TIN to persons (including federal agencies) who are required to file information returns with the IRS to report interest, dividends, or certain other income paid to you; mortgage interest you paid; the acquisition or abandonment of secured property; the cancellation of debt; or contributions you made to an IRA, Archer MSA, or HSA. The person collecting this form uses the information on the form to file information returns with the IRS, reporting the above information. Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation and to cities, states, the District of Columbia, and U.S. commonwealths and possessions for use in administering their laws. The information also may be disclosed to other countries under a treaty, to federal and state agencies to enforce civil and criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism. You must provide your TIN whether or not you are required to file a tax return. Under section 3406, payers must generally withhold a percentage of taxable interest, dividend, and certain other payments to a payee who does not give a TIN to the payer. Certain penalties may also apply for providing false or fraudulent information.