



# COPPER RIDGE

## Onboarding Packet

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Balance sheet and income statement	
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# COPPER RIDGE ON BOARDING PACKET

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🌐 www.copperridgerentals.com

## OWNER INFORMATION INFORMATION

Legal Name \_\_\_\_\_

Chief Executive Office Address \_\_\_\_\_

Mailing Address \_\_\_\_\_

Phone Number \_\_\_\_\_ E-Mail Address \_\_\_\_\_

Principal Contact \_\_\_\_\_ Position \_\_\_\_\_

Operational license # \_\_\_\_\_ Insurance Policy #? \_\_\_\_\_

Insurance Agent for Home Coverage \_\_\_\_\_

Phone Number \_\_\_\_\_

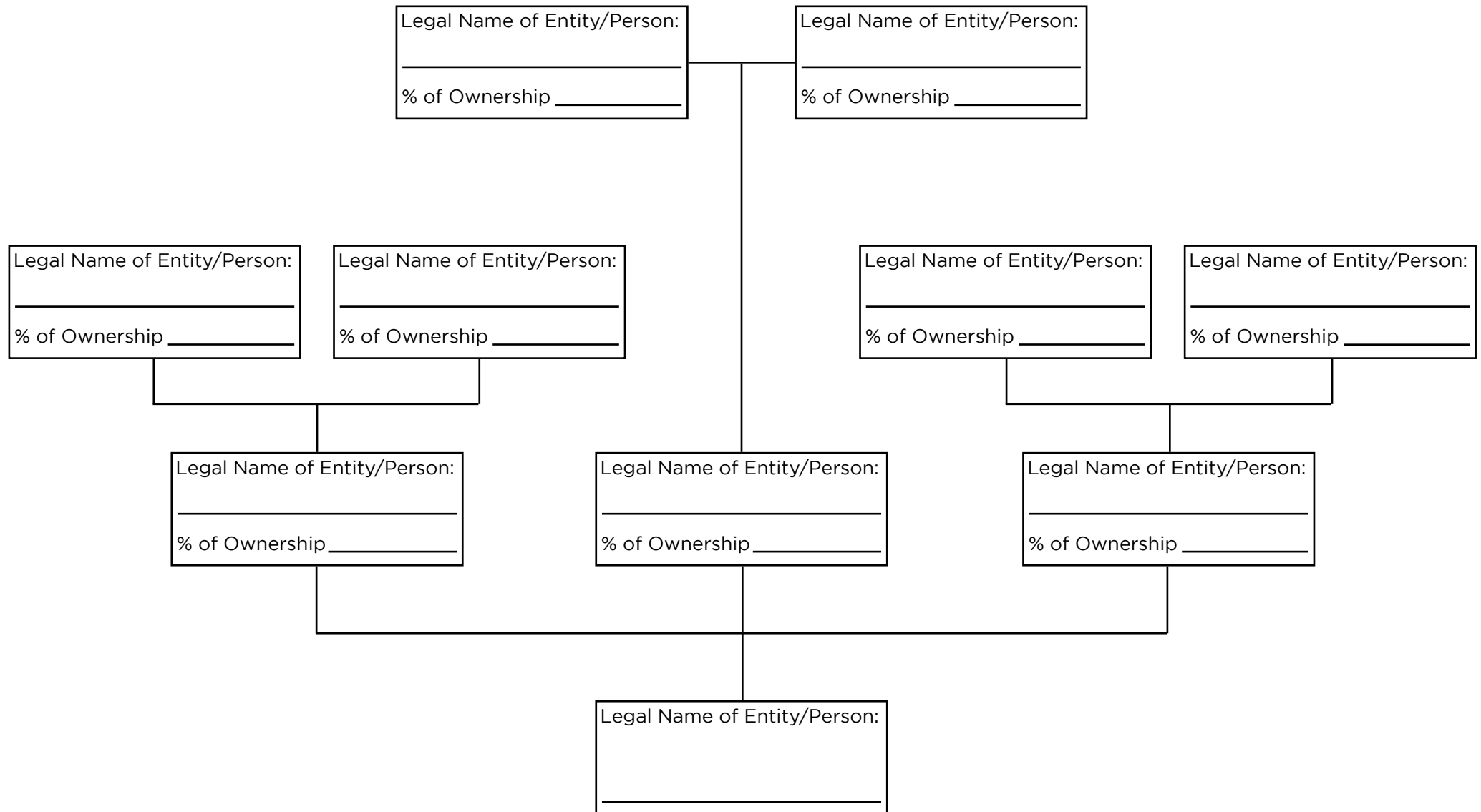
Are you Sales Tax Exempt?      Yes      No

## OWNERS INFORMATION

Name	Owner/ Principal/ Guarantor	Title	% Ownership	Address	Phone#

# Ownership Information: Who we pay and what percentage

Preferred payment information can be sent in owner's own format



# Property Information

Please provide the information below. You may make your own template if you prefer. Attach additional pages if needed

#	Structure Type (ex duplex, 4-Plex, ect.)	Mailing Address	City/State	Tenant Name	Phone#	Email	Rent	Pet? (Y/N)	SEC DEP
Tenant 1							\$		
Tenant 2							\$		
Tenant 3							\$		
Tenant 4							\$		
Tenant 5							\$		
Tenant 6							\$		
Tenant 7							\$		
Tenant 8							\$		
Tenant 9							\$		
Tenant 10							\$		

#	Lease Start Date	Lease Term 1,3,6 Months or 1 Year	Who Pays-Tenant or Owner ?				Other	Door Code
			Electric	Water/Sewer	Gas	Trash		
Tenant 1								
Tenant 2								
Tenant 3								
Tenant 4								
Tenant 5								
Tenant 6								
Tenant 7								
Tenant 8								
Tenant 9								
Tenant 10								

# Property Information Cont

## Utility Information

\*need information outlined in black only if we will be paying bill/managing account

Please complete the information in orange regardless of bill pay in the event of an emergency

#	Utilities	Vendor Name	Building Address	Contact Person	Phone	Email	Account Number	Login Username	Password	Average Monthly Amount	Other/Notes
1	Water/ Sewer										
2	GAS										
3	Electric										
4	Internet										
5	Tax										
6	Insurance										
7	Security										
8	Debt service										
9	lawn/ Snow removal										
10	Trash										



# COPPER RIDGE ON BOARDING PACKET

## PERSONAL NOTICE OF INVESTIGATION

(TO BE COMPLETED BY EACH GUARANTOR)

### OWNER BACKGROUND CHECK

The undersigned individual hereby authorizes to Copper Ridge Rentals investigate the personal credit history of the undersigned and obtain credit bureau reports on the undersigned from time to time at Copper Ridge Rentals sole discretion. The undersigned further authorizes Copper Ridge Rentals to investigate the undersigned through MARI and/or similar databases from time to time at Copper Ridge Rentals sole discretion. The undersigned acknowledges that Copper Ridge Rentals may report the undersigned to background databases, such as MARI, and agrees to indemnify and hold harmless Copper Ridge Rentals for any information reported to MARI, any similar databases, any credit bureaus, and other entities to which Copper Ridge Rentals May Report.

SIGNATURE \_\_\_\_\_

PRINTED NAME \_\_\_\_\_

HOME ADDRESS \_\_\_\_\_

PHONE # \_\_\_\_\_ SSN \_\_\_\_\_ DATE \_\_\_\_\_

SIGNATURE \_\_\_\_\_

PRINTED NAME \_\_\_\_\_

HOME ADDRESS \_\_\_\_\_

PHONE # \_\_\_\_\_ SSN \_\_\_\_\_ DATE \_\_\_\_\_

A photographic or carbon copy of the authorized signatures may be deemed to be the equivalent of the original signatures.

The term shall include any and all employees, parent companies, subsidiaries, and assigns.



# **PLEASE ATTACH**

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Flash drive or google drive link also accepted

## **PROPERTY INFORMATION**

- All tenant leases currently on File
- Landlord Insurance Policy (if applicable)
- Invoices & Receipts for maintenance work (if applicable)
- Property tax records (if applicable)
- Marketing information & property photos (if applicable)

## **ORGANIZATIONAL DOCUMENTS**

- Organizational Documents and Operating Agreement (if applicable)
- Attach an organizational chart for the retailer entity and each property. Or use the blank organizational chart enclosed.
- Only need for entities with multiple owners or income over \$5,000 per month to verify

## **BUSINESS FINANCIALS**

- Business cash flow verification statements showing income + expenses
- If business was recently formed, provide a start-up balance sheet and proforma income statement.
- Disclaimer/Signature stating the property is not negative cash flow
- The property management contract can be terminated by Copper Ridge at any time for any reason



## POSITIVE CASH FLOW VERIFICATION STATEMENT

I \_\_\_\_\_ (owner) verify that the properties that are to be managed by Copper Ridge Rentals are in a positive cash-flow position.

If the property does not meet these criteria, we can work up a custom quote to facilitate getting the property turned around.

We generally work at a time and material basis until an agreed upon occupancy (70-80%) is met.