



## Changing Property Management Companies Checklist:

Changing property management companies shouldn't be hard. But unfortunately, this is often the case. This checklist will help you keep the transition as smooth as possible, by knowing what you need to include in a request for proposal (RFP) and what questions to ask your potential property management company before or during a site visit.

### What to include on a request for a proposal:

**Building Age:**                      **Building Size (No. of Units):**                      **Any ongoing or anticipated projects?:**

**Number of meetings per year (Councils + AGMs):**

**When would be a good time for a site visit?:**

**Type of Strata:**

*Residential*                      *Commercial*                      *Mixed-Use*

### Questions to ask before + during a site visit:

**During a management transition, do you meet with owners and/or offer assistance?**

**What is your standard response time and policy for communicating with Council and Owners/Residents?**

**What does your termination clause look like?**

**How do you assign a Strata or Property Manager?**

**How long does it typically take to distribute minutes and letters?**

**How do you communicate with owners, and what technology do you use?**