EQUISTEAD PROPERTIES, LLC
Efficiency in Property Management
1421 N Meadowwood Ln, Suite 50 | Liberty Lake, WA 99019 | clients@equistead-pm.com

New Owner Information Packet

2026 Owner-Facing Edition

Welcome to Equistead Properties. We are excited to partner with you in managing your investment. Our goal is simple: deliver transparent, efficient, and reliable property management that protects your asset and supports long-term performance.

Note: Service pricing and any property-specific charges are reviewed separately during onboarding and documented in the management agreement.

What owners can expect

Communication

- Your AppFolio Owner Portal houses statements, invoices, inspections, and communication logs with 24/7 access.
- We notify you of emergencies and consult you on maintenance items above your approval limit.
- You set your preferred communication methods and maintenance approval thresholds.
- Monthly financial statements are generally issued between the 7th and 10th of each month once rent clears.

Protecting your investment

- Comprehensive tenant screening includes credit, income, rental, criminal, and pet-history review.
- Digital inspections with photo documentation are completed at move-in and move-out.
- Utility oversight helps ensure accounts are transferred, billed, and monitored correctly.
- Ongoing vendor coordination supports repairs, routine maintenance, and compliance needs.

Tenant experience

- Prompt response times and clear service standards help maintain tenant satisfaction and retention.
- Tenants receive move-in, move-out, and seasonal guidance to help them care for the property responsibly.
- Tenant communications through AppFolio, email, and phone are documented for transparency.

Onboarding process

Our onboarding process is designed to create a clean transition, establish expectations, and prepare the property for consistent management.

Step	What happens
1	Initial property walkthrough - Legal compliance check, condition review, and professional photos.

Step	What happens
2	Review of existing tenancy (if applicable) - Lease verification, inspection, and introduction to Equistead systems.
3	Management agreement - A digital agreement is sent for electronic signature.
4	Owner portal activation - Property setup in AppFolio and funding of the owner reserve.
5	Marketing and tenant transition - Listing creation, tenant communication, or lease assumption.
6	Ongoing management - Rent collection, maintenance coordination, inspections, and monthly reporting.

Policies, reporting, and operational standards

Tenant Benefit Package

- Rent reporting to the major credit bureaus.
- Financial wellness tools such as credit monitoring, budgeting support, and identity resources.
- Identity-theft protection and rental-related discount programs.

This package is billed to the tenant.

Utilities and records

- Tenant utility accounts are tracked for accuracy and compliance.
- Owner-paid utilities are handled through property reserves when applicable.
- Statements, invoices, inspections, and communication records remain available in the owner portal.

Owner expectations and insurance

We recommend maintaining a landlord policy that includes:

- Dwelling and structure coverage.
- Liability protection of at least $500,000.
- Loss-of-rent coverage for extended vacancy caused by a covered loss.
- Equistead Properties, LLC listed as an Additional Insured so we can communicate directly with your carrier when needed.

Equistead currently maintains commercial general liability and professional liability insurance for its operations.

Frequently asked questions

When will I receive my monthly owner distribution?	Distributions are typically processed between the 7th and 10th of each month once rent clears and expenses are recorded.
Can I approve all maintenance before it is scheduled?	Yes. We follow your selected approval threshold, while emergencies are addressed immediately.

For informational purposes only. Final terms are governed by the signed Property Management Agreement.

Will I receive year-end tax documents?	Yes. Your 1099 and annual summary statement are typically issued by January 31 each year.
Can I view property activity in real time?	Yes. Your owner portal provides visibility into income, expenses, invoices, and inspection reports.
How do I update my bank or reserve information?	Please contact our team and we will coordinate secure updates to your profile.

Why owners choose Equistead

Equistead standard

- Digital inspections with photo documentation shared to your portal.
- Documented communication history for owners and tenants.
- Consistent vendor supervision and maintenance coordination.
- Portal-based visibility into statements, invoices, and reports.
- Clear onboarding, reserve setup, and approval-threshold process.

Typical management experience

- Less visibility into inspections and communication history.
- Fragmented reporting or document delivery outside a portal.
- Inconsistent maintenance coordination and vendor follow-through.
- Slower access to property records and supporting documentation.
- Less-defined owner onboarding and approval workflows.

Questions? Contact our team

Jason Farrow

General Manager of Operations

(509) 590-2433 Ext.1
jason@equistead-pm.com
www.equisteadproperties.com

Chaz Halstead

General Manager

(509) 590-2433 Ext.4
chaz@equistead-pm.com
www.equisteadproperties.com

For informational purposes only. Final terms are governed by the signed Property Management Agreement.