



Sundial Real Estate  
 444 W. Main Street  
 Suite 104  
 Mesa, AZ 85201  
 Office 480-966-2170  
 Fax 480-969-4006  
 www.SundialRealEstateAZ.com

## Owner Information Form

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

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

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

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

**DISBURSEMENT INFORMATION**

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

**1. MORTGAGE PAYMENT**

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

**PAYMENT ADDRESS**

PAYMENT AMOUNT	PAYMENT DUE DATE	LOAN NUMBER
----------------	------------------	-------------

**2. SECOND TRUST DEEDS PAYMENT**

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

**PAYMENT ADDRESS**

PAYMENT AMOUNT	PAYMENT DUE DATE	LOAN NUMBER
----------------	------------------	-------------

**3. PROPERTY TAX PAYMENTS**

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

**PAYMENT ADDRESS**

PAYMENT AMOUNT	PAYMENT DUE DATE	TAX NUMBER
----------------	------------------	------------

\$ \_\_\_\_\_ 1<sup>ST</sup> installment is due on the 1<sup>st</sup> day of November---1<sup>st</sup> installment is late after the 10<sup>th</sup> of December

\$ \_\_\_\_\_ 2<sup>nd</sup> installment is due on the 1<sup>st</sup> day of February---2<sup>nd</sup> installment is late after the 10<sup>th</sup> of April.

**4. INSURANCE PREMIUMS**

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

**NAME OF AGENCY****PAYMENT ADDRESS**

PAYMENT AMOUNT	NEXT PREMIUM DATE	INSURANCE POLICY NUMBER
----------------	-------------------	-------------------------

**5. HOMEOWNER DUES**

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

**PAYMENT ADDRESS**

PAYMENT AMOUNT	PAYMENT DUE DATE
----------------	------------------

**6. GARDEN OR POOL SERVICE**

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

**PAYMENT ADDRESS**

PAYMENT AMOUNT	PAMENT DUE DATE
----------------	-----------------

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

