

LEASE AND MANAGE / PACK 05

# Residential property management pack

05

The owner appointment, renter onboarding and recurring compliance rhythm.

## THE FIVE-STAGE CONTROL MAP

A file becomes defensible when each stage has an owner, a current source, an approval and retained evidence.

|                        |                      |                     |                      |                     |
|------------------------|----------------------|---------------------|----------------------|---------------------|
| <b>01</b><br>Authority | <b>02</b><br>Prepare | <b>03</b><br>Select | <b>04</b><br>Move-in | <b>05</b><br>Manage |
|------------------------|----------------------|---------------------|----------------------|---------------------|

### W AGENT RULE

Draft the operational brief. Use official prescribed forms. Route legal instruments to the licensed professional responsible for them.

## PACK 05 / ACTION CHECKLIST

# Build the evidence file

Tick only when the document exists, is current, has been approved by the right person and is stored against the matter.

|    |                                    |                                                                                                                                |                          |
|----|------------------------------------|--------------------------------------------------------------------------------------------------------------------------------|--------------------------|
| 01 | <b>Managing authority</b>          | Owner identity, property, services, fees, expenses, repair limits, inspections, termination and signed copy.                   | <input type="checkbox"/> |
| 02 | <b>Property compliance</b>         | Minimum standards, prescribed disclosures, safety checks, urgent repair contacts and known defects.                            | <input type="checkbox"/> |
| 03 | <b>Advertising and application</b> | Accurate ad, no rental bidding, prescribed application form from 31 March 2026 and lawful information requests.                | <input type="checkbox"/> |
| 04 | <b>Selection record</b>            | Document neutral criteria, decision, references, identity handling, unsuccessful applicant disposal and discrimination checks. | <input type="checkbox"/> |
| 05 | <b>Agreement</b>                   | Use current prescribed Form 1 or Form 2; attach lawful additional terms and owners corporation rules if relevant.              | <input type="checkbox"/> |
| 06 | <b>Before move-in</b>              | Give required guide and disclosures, signed agreement, condition report, keys, safety contacts and payment instructions.       | <input type="checkbox"/> |
| 07 | <b>Bond and rent</b>               | Lodge bond, issue receipts, reconcile money and keep the renter ledger and trust ledger aligned.                               | <input type="checkbox"/> |
| 08 | <b>Condition evidence</b>          | Signed entry report, date-stamped images, renter amendments, exit inspection opportunity and exit report.                      | <input type="checkbox"/> |
| 09 | <b>Ongoing diary</b>               | Inspections, safety checks, maintenance, notices, rent review, lease end, complaints and owner approvals.                      | <input type="checkbox"/> |
| 10 | <b>End of tenancy</b>              | Notice validity, keys, final condition, water/rent adjustment, bond claim evidence and dispute path.                           | <input type="checkbox"/> |

## PACK 05 / SIGNING BOUNDARY

# What W Agent must not blur

These controls are deliberately conservative. They protect the client, the agency and the professional who is responsible for the final instrument.

|   |                                                                                                                             |
|---|-----------------------------------------------------------------------------------------------------------------------------|
| 1 | The prescribed rental application and rental agreement must remain current and must not include prohibited terms.           |
| 2 | A rental provider's instruction does not authorise an agent to breach rental, discrimination, privacy or trust-account law. |
| 3 | Use a matter-specific notice calculator and a second-person check before serving any notice that may end a tenancy.         |

## OFFICIAL SOURCES

Open the live source again immediately before use. A saved or printed copy can become stale.

|    |                                                                                                                                                                                                                                                                                                                                                        |
|----|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 01 | CAV residential rental agreements<br><a href="https://www.consumer.vic.gov.au/housing/renting/starting-and-changing-rental-agreements/different-rental-agreements/residential-rental-agreements">https://www.consumer.vic.gov.au/housing/renting/starting-and-changing-rental-agreements/different-rental-agreements/residential-rental-agreements</a> |
| 02 | CAV rental applications<br><a href="https://www.consumer.vic.gov.au/housing/renting/starting-and-changing-rental-agreements/applying-signing-and-moving-in/applying-for-a-property">https://www.consumer.vic.gov.au/housing/renting/starting-and-changing-rental-agreements/applying-signing-and-moving-in/applying-for-a-property</a>                 |
| 03 | CAV condition reports<br><a href="https://www.consumer.vic.gov.au/housing/renting/rent-bond-bills-and-condition-reports/condition-reports">https://www.consumer.vic.gov.au/housing/renting/rent-bond-bills-and-condition-reports/condition-reports</a>                                                                                                 |
| 04 | CAV trust accounts<br><a href="https://www.consumer.vic.gov.au/licensing-and-registration/estate-agents/running-your-business/trust-accounts">https://www.consumer.vic.gov.au/licensing-and-registration/estate-agents/running-your-business/trust-accounts</a>                                                                                        |

**IMPORTANT**

This W Agent pack is a general operational checklist, not legal, conveyancing, financial, tax, valuation, planning, building, employment or franchising advice. It is not a prescribed form, authority, contract, disclosure document or government-approved instrument. Laws, forms, facts and transaction risks change. Obtain matter-specific advice and use current official or professionally licensed documents before signing, serving, advertising, receiving trust money or providing a regulated service.