

# Monthly Consulting Without Documents – Consulting Services Scope of Work

Addendum # \_\_\_\_\_

**Company:** \_\_\_\_\_ (hereinafter “Company”)

**Consultant:** Crown Investor Institute, LLC (hereinafter “Consultant”)

Upon execution of this *Consulting Services Scope of Work* it shall become an Addendum to that certain Consulting Agreement (the “Agreement”) executed between the parties on \_\_\_\_\_ and is considered incorporated into and a part of that Agreement by reference.

**Definition of the Service:** A monthly consulting agreement where Consultant guides the Company on topics defined by the Company. This package comes with a consulting slots every third week with Crown’s staff including Robert, Tony and Denise, PLUS access to staff for time-sensitive events Company needs assistance with, PLUS access to the Customer Support Center where new document packages are offered to current clients. This is about **putting our shoulder behind your company for the duration of this Addendum** and unloading all we know about this business.

**Term:** Month-to-month. Company or Consultant can terminate at any time.

**Cost:** \$500 a month paid in advance on the 1st of every month (\$50 late fee after the 5th and \$100 after the 15th).

Agreed to this \_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

**COMPANY:** \_\_\_\_\_

**CONSULTANT:** Crown Investor Institute, LLC

X \_\_\_\_\_

X \_\_\_\_\_

Its \_\_\_\_\_

Its \_\_\_\_\_

## Possible Topics

### Dealing with Owners

#### **Building a Customized (Killer) Management Agreement**

- Build a customized PMA (or revise your existing document)
- Build housekeeping (CYA) documents
- Build ancillary documents
- Build entity documents
- Add owner side revenue streams
- Develop full disclosure for future fees and revenue streams

#### **Building a Scope of Service**

- Identify previously established 3<sup>rd</sup> party relationships
- Define asset management vs property management
- Create a job description for the property manager
- Define leasing, management and maintenance Scope of Service

#### **Building an Owner Handbook**

## **Onboarding**

**Owner side revenue generators** - Learn tons of services, charges and spreads to add revenues to your company P&L.

## **Dealing with Tenants**

### **Building a Customized (Killer) Lease Agreement**

Build a customized lease (or revise your existing document)

Build housekeeping (CYA) documents

**Build your Qualifying Guidelines-** You must have an extensive written set of qualifying guidelines so you protect yourself from fair housing claims.

**Build a tenant handbook**

## **Other Topics We Can Engage In**

**Tweaking your financial statements**

**Tracking your business stats**

**Getting more out of your company pre-tax**

**Balancing trust accounts**

**Getting ready to sell your company**

**Review office tech systems**

**Managing threats of (and actual) litigation**

**Tools for hiring the right people**

**Spoiling the staff and keeping them**

**Profiting on property visits**

**Managing mold claims**

**Scheduled maintenance options**

**6 ways to profit on maintenance**

**Rehab, renovation, restoration revenues**

**Make money on ALL maintenance**

**Vendor agreements**

**Vendor revenue generators**