Owner Onboarding Checklist

This information is essential for effectively onboarding your property into Triad's management system.
Please complete the checklist below so we can ensure seamless setup and guest operations.

Property & Contact Details:

- ☐ Property Address (including unit number if applicable)
- ☐ Mailing Address (if different from property)
- ☐ Guest Contact (name, phone, relation)
- ☐ Link to your existing property listing (URL)

Owner Information:

- ☐ Full Legal Name
- ☐ Date of Birth
- ☐ LLC Name (if applicable)
- ☐ If Business Bank Account:
  Employer Identification Number
- ☐ If Personal Bank Account:
  Social Security Number (SSN)
- ☐ Citizenship & Place of Birth
- ☐ Primary Phone Number
- ☐ Email Address

Banking & Payment Information:

- ☐ Bank Name
- ☐ Account Holder Name
- ☐ Routing Number
- ☐ Account Number
- ☐ Type of Account (Checking / Savings)

Note: Credit card information must be collected securely during the Onboarding Call with Triad.

Property Access:

- ☐ How do we enter the property?
  (smart lock, lockbox, door code, key, concierge, etc.)
- ☐ Smart Lock Account Username & Password
- ☐ Lockbox Code
- ☐ WiFi Network Name (SSID)
- ☐ WiFi Password

Property Operations:

- ☐ Trash Collection Day(s)
- ☐ Recycling Collection Day(s)
- ☐ Parking Details (number of spaces, permits, restrictions)
- ☐ HOA / Building Rules
- ☐ Regular Service Providers (e.g., landscaper, pool service, pest control, etc.)

Guest Contact & Cleaner Information:

- ☐ Guest Contact: Name / Phone / Email
- ☐ Cleaner Information: Name / Phone / Email

Additional Information:

- ☐ Special Instructions (e.g., quirks of the home, preferred contractors, neighbor considerations)

Once all information is collected, Triad will complete your property's onboarding and activate it on Airbnb, VRBO, and other platforms.