



TRANSACTION INFORMATION PACKAGE

(RENTAL / LEASE)

Revised 7/17

**FOR YOUR LEGAL PROTECTION, DOCUMENT ALL
TELEPHONE & PERSONAL CONVERSATIONS RELATED TO
THE TRANSACTION!**

IMPORTANT: You are required to review the Q&A on the following pages of this document, PRIOR to writing each Listing Agreement or Lease, to ensure that you begin each transaction using the correct forms and supplemental disclosures. The answers you provide in this package will determine the supplemental disclosures and/or form substitutions required for your particular transaction. Once you have a fully executed Lease Agreement, please complete this entire package and submit to United Realty Group within 48 hours of execution.

PROPERTY INFO

MLS #: _____

APN#: _____

Street Address: _____

City: _____

Zip Code: _____ County: _____

Is your client(s) in this transaction a lead provided by United Realty Group?

☐

YES

☐

NO

Property Type (*check one*): ☐ SFR ☐ Condo ☐ 2-4 Unit ☐ Other

Zoning (*check one*): ☐ Residential ☐ Commercial ☐ Industrial

Representing (*check one*): ☐ Tenant ☐ Landlord ☐ Dual

1) Will this lease contain an option to buy, or a long-term ground lease?

NO _____

*YES _____ If yes, please **STOP HERE!**

- Leases with an option to purchase, and long-term ground leases, are treated like sales transactions, not leases, for disclosure purposes. Please stop completing this TIP, and instead complete the "TIP (sale)", use the applicable sale checklist, and otherwise treat this transaction as a sale for disclosure purposes.

2) Do you have any ownership interest in the property being leased, or are you representing yourself as a tenant?

NOTE: If you are listing your own property or representing yourself as tenant, you **CANNOT** represent the other party.

NO _____

*YES _____ If yes, you must disclose the following in the Lease Agreement or an addendum:

- **"Tenant/Landlord discloses that he/she is a licensed real estate broker/salesperson, and is representing himself/herself in this transaction".**
**Disclose up-front at the same time or prior to execution of Lease Agreement. If you are the listing agent, also disclose in the "confidential remarks" area of your MLS listing.*

3) Are you related to any party in the transaction?

NO _____

*YES _____ If yes, you must disclose the following in the Lease Contract or an addendum:

- **"Tenant's Agent / Listing Agent discloses a family relationship with Tenant / Landlord / Other."**
**Disclose up-front at the same time or prior to execution of Lease Agreement. If you are the listing agent, also disclose in the "confidential remarks" area of your MLS listing.*

4) If you are the listing agent or dual agent, were there any tenant applications that were denied by landlord for credit reasons?

N/A (I'm the Tenant's Agent only) _____

NO _____

*YES _____ If yes, you must add the following disclosure to your checklist (one for each tenant applicant that was denied by landlord for credit reasons), and provide a copy to denied tenant applicant:

- **Denial of Rental Application for Credit Reasons**
(C.A.R form DRA)

5) Does this transaction include a non-C.A.R lease agreement, addendum, or other document (prepared by the other party in the transaction or their agent)?

NO _____

*YES _____ If yes, you must add the following disclosure to your checklist, and have the our client sign it PRIOR to signing any Non-C.A.R documents:

- **Disclosure Regarding Non-C.A.R Documents**
(Document Library > Disclosures > In-House Disclosures)
**Obtain up-front at the same time or prior to execution of Lease Agreement (or prior to our client signing any non-C.A.R. document prepared by the other party or their agent).*

6) Was the subject property built prior to 1978?

NO _____

*YES _____ If yes, you must add the following disclosure to your checklist:

- **Lead Based Paint & Lead Based Paint Hazard Disclosure**
(C.A.R form FLD) **Obtain up-front at the same time or prior to execution of Lease Agreement.*

7) Will tenant be billed for water service separately from the rent?

NO _____

*YES _____ If yes, you must add the following form to your checklist:

- **Water Submeter Addendum** (CAR form WSM)
**Obtain up-front at the same time as execution of Lease Agreement.*

8) Will some or all of your communications with our client go through an interpreter/translator?

NO _____

*YES _____ If yes, you must add the following to your checklist:

- **Interpreter/Translator Agreement**
(C.A.R form ITA)
**Obtain up-front at the same time or prior to execution of Lease Agreement.*

9) Does this transaction involve a vacation rental with short-term occupancy (30 days or less)?

NO _____

*YES _____ If yes, you must substitute the following form for the Residential Lease or Month-To-Month Rental Agreement (LR):

- **Vacation Rental Agreement**
(C.A.R form VRA)

If you are the listing agent, you must also substitute the following form for the Lease Listing Agreement (LL):

- **Exclusive Authorization for Vacation Rental**
(C.A.R form VRL)

10) Is the subject a commercial property?

NOTE: If yes, see "Commercial Rental/Lease Disclosure Exemptions" form in our Document Library.

NO _____

*YES _____ If yes, you must substitute the following form for the Residential Lease or Month-To-Month Rental Agreement (LR):

- **Commercial Lease Agreement**
(C.A.R form CL)

You must also add the following disclosure to your checklist:

- **Commercial Lease Construction Accessibility Addendum**
(CAR form CLCA) **Obtain up-front at the same time or prior to execution of Lease Agreement.*

If you are the listing agent, you must also substitute the following form for the Lease Listing Agreement (LL):

- **Commercial and Residential Income Listing Agreement**
(C.A.R form CLA)

11) Is the subject property located in San Francisco?

NO _____

*YES _____ If yes, you must add the following form to your checklist:

- **San Francisco Addendum to CAR Residential Lease or Month-to-Month Rental Agreement** (SFCA form ALR-SF)
**Obtain up-front at the same time as execution of Lease Agreement.*

12) Is the Tenant **OR** Landlord a Corporation/LLC/Partnership, Trust, Estate, or authorized by power of attorney?

NO _____

*YES _____ If yes, you must add the applicable version of the following form to your checklist:

- **Representative Capacity Signature Disclosure**
(C.A.R. form RCSD-T and/or RCSD-LL)
**Obtain up-front at the same time as Listing and/or Lease Agreement as applicable*

13) Has the subject property been identified as being contaminated by methamphetamine?

NO _____

*YES _____ If yes, you must add the following form to your checklist:

- **Methamphetamine Contamination Notice**
(C.A.R form MCN) **Obtain up-front at the same time or prior to execution of Lease Agreement.*

14) Has an NOD (Notice of Default) Been filed on the subject property?

NO _____

*YES _____ If yes, you must add the following form to your checklist:

- **Landlord in Default Addendum** (C.A.R form LID) **Obtain up-front at the same time as execution of Lease Agreement.*

15) Is there a referral fee due to another brokerage (or an interoffice referral fee due to another URG agent) for referring you a client in this transaction?

NO _____

*YES _____ If yes, you must place a check next to the applicable scenario below, and add the corresponding form(s) to your checklist.

If an "Interoffice" Referral Fee is due to another URG agent:

- **Interoffice Referral Fee Agreement** ☐
(Document Library > Office Documents)

If a Referral Fee is due to another Brokerage:

- **Referral Fee Agreement** (C.A.R form RFA-11) ☐
- **W9 from broker providing you the referral**

COMMENTS: (Please provide any comments, details, or pertinent information about the transaction here)

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

-TRANSACTION INFO PACKAGE-

TENANT'S INFORMATION

Name: _____

Phone #: _____

Email Address: _____

Address: _____

City: _____ State: _____ Zip: _____

Note: All information for Tenant and Co-Tenant is required if you are representing Tenant(s). If you are not representing Tenant(s), please provide at least the Tenant(s) name(s).

CO- TENANT'S INFORMATION

Name: _____

Phone #: _____

Email Address: _____

Address: _____

City: _____ State: _____ Zip: _____

LANDLORD'S INFORMATION

Name: _____

Phone #: _____

Email Address: _____

Address: _____

City: _____ State: _____ Zip: _____

Note: All information for Landlord and Co-Landlord is required if you are representing Landlord(s). If you are not representing Landlord(s), please provide at least the Landlord(s) name(s).

CO- LANDLORD'S INFORMATION

Name: _____

Phone #: _____

Email Address: _____

Address: _____

City: _____ State: _____ Zip: _____

-TRANSACTION INFO PACKAGE-

COOPERATING BROKER & AGENT INFORMATION

(Brokerage representing the other party)

Firm Name: _____

License#: _____

Phone #: _____

Note: All information here is required
unless the other party is not being
represented by a real estate broker/agent.

Agent Name: _____

License #: _____

Phone #: _____

Email Address: _____

COMMISSION PAYMENTS

**ALL RENTAL COMMISSION CHECKS ARE TO BE MADE PAYABLE TO UNITED REALTY GROUP,
AND MAILED TO:**

**2292 FARADAY AVENUE
SUITE 100
CARLSBAD, CA 92008**



BY SIGNING BELOW, I HEREBY CERTIFY THAT THE INFORMATION AND ANSWERS PROVIDED IN THIS “TRANSACTION INFORMATION PACKAGE (TIP)” ARE TRUE AND CORRECT, TO THE BEST OF MY KNOWLEDGE. I HAVE EXERCISED A REASONABLE AMOUNT OF DILIGENCE TO ENSURE THE INFORMATION AND ANSWERS I HAVE PROVIDED ARE TRUE AND CORRECT.

IF I BECOME AWARE THAT ANY OF THE INFORMATION OR ANSWERS PROVIDED IN THIS “TRANSACTION INFORMATION PACKAGE (TIP)” HAVE CHANGED DURING THE COURSE OF THE TRANSACTION, I UNDERSTAND THAT I MUST REFERENCE BACK TO THIS DOCUMENT AND MAKE THE CORRECTION. UPLOAD THE CORRECTED PAGE OF THIS “TRANSACTION INFORMATION PACKAGE (TIP)” TO MY TRANSACTION FILE, AND TAKE ANY APPLICABLE ACTION AS INSTRUCTED BY THE “TRANSACTION INFORMATION PACKAGE (TIP)” (i.e. ADD ANY APPLICABLE FORMS/DISCLOSURES TO MY TRANSACTION CHECKLIST, ETC.).

FURTHERMORE, I CERTIFY THAT ANY AND ALL DOCUMENTS EXECUTED DURING THE COURSE OF THIS TRANSACTION WILL BE REPORTED ON THE APPLICABLE TRANSACTION CHECKLIST, AND UPLOADED TO MY TRANSACTION FILE WITHIN 48 HOURS OF EXECUTION.

ASSOCIATE-LICENSEE NAME: _____

ASSOCIATE-LICENSEE SIGNATURE: _____

DATE: _____

REVIEWED BY (Broker): _____

SIGNATURE: _____

DATE: _____