

New Property Setup Survey

[Used to request a utility allowance calculation for a property not previously on record]

Purpose: This form is utilized by new and existing clients for establishing a property record in the Client Portal. Questions: uadept@zeffert.com or 800.820.4079, prompt 5.

Step 1: Project Information

Property Name Management Company	Site Manager
<i>(Physical address, city, state, zip)</i> Address	Housing Authority
Phone	<i>(If applicable)</i> HUD Contract Anniversary Date
Email	<i>(If applicable)</i> HUD Contract Number

Funding Sources <small>(Check all that apply):</small>	<input type="checkbox"/> LIHTC	<input type="checkbox"/> RD	<input type="checkbox"/> HOME	<input type="checkbox"/> PBRA / HUD Multifamily	<input type="checkbox"/> Voucher	<input type="checkbox"/> Public Housing
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Unit Counts	_____ +	_____ +	_____ +	_____ +	_____ =	
	Studio	1 Bedroom	2 Bedroom	3 Bedroom	4 Bedroom	Total

Step 2: Utility Companies

Utility Type	Paid By (Select One Only)		Utility Company Name or "N/A"
	Tenant	Property	
Electric	<input type="checkbox"/>	<input type="checkbox"/>	_____
Gas	<input type="checkbox"/>	<input type="checkbox"/>	_____
Water	<input type="checkbox"/>	<input type="checkbox"/>	_____
Sewer	<input type="checkbox"/>	<input type="checkbox"/>	_____
Trash	<input type="checkbox"/>	<input type="checkbox"/>	_____

Step 3: Heating Sources

	Paid By (Select One Only)		Heating Source (Select One Only)			
	Tenant	Property	Electric	Natural Gas	Bottled Gas	Other
Heating	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cooking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Water Heating	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Utility Allowance: Actual Use, HUD Models, Baselines **Inspection Services:** Capital Needs Assessments, Accessibility, Design Reviews

Compliance: File Reviews, Onsite Reviews **Training:** Public, Private, Online, Speaking Engagements