

Lease Renewal Checklist

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Initial Assessment & Tenant Communication

Gather information and initiate discussions with the tenant regarding renewal intentions.

Date of Initial Contact Regarding Renewal

Enter date...

Summary of Initial Tenant Communication (Verbal or Email)

Write something...



Tenant's Initial Stated Interest in Renewal?

- Yes - Eager to Renew
- Yes - Willing to Consider
- Undecided / Needs More Information
- No - Unlikely to Renew

Tenant's Concerns/Questions (if any)

Write something...

Method of Initial Communication

- Phone Call
- Email
- In-Person
- Text Message

Date of Follow-Up Communication (if applicable)

Enter date...

Summary of Follow-Up Communication (if applicable)

Write something...

Market Research & Rental Rate Analysis

Research current market conditions and comparable rental rates to determine appropriate renewal pricing.

Comparable Rental Rates (Average)

Enter a number...

Average Square Footage of Comparables

Enter a number...

Neighborhood Condition (Overall)

- Excellent
- Good
- Fair
- Poor

Notes on Market Trends & Factors

Write something...

Supporting Documentation (e.g., rental listings, property reports)

 Upload File

Vacancy Rate in Area

Enter a number...

Type of Comparable Properties

- Single-Family Homes
- Condos
- Apartments
- Townhouses

Lease Review & Amendment Preparation

Review the current lease agreement and identify any necessary amendments or changes for the renewal.

Current Lease Expiration Date (Verify)

Write something...

Lease Type (Confirm)

- Residential
- Commercial
- Industrial

Summary of Key Lease Terms (Current)

Write something...

Current Monthly Rent

Enter a number...

Special Clauses or Addenda (Note any)

Write something...

Review for Required Amendments (Select All that Apply)

- Security Deposit Amount
- Pet Policy
- Maintenance Responsibilities
- Subletting/Assignment
- Utilities
- Insurance Requirements
- Other

Date of Last Lease Review (For Record Keeping)

Enter date...

Financial Evaluation & Proposal Creation

Assess property financials and create a compelling renewal proposal for the tenant.

Current Annual Rent

Estimated Market Rent for Similar Units

Proposed Annual Rent Increase (in \$)

Percentage Rent Increase

Rationale for Rent Increase (Justification)

Renewal Incentive Offered (if any)

- None
- Rent Credit
- Property Improvement
- Other (Specify in Long Text)

Details of Renewal Incentive (if applicable)

Write something...

Renewal Fee (if applicable)

Enter a number...

Negotiation & Agreement

Engage in negotiations with the tenant and finalize the lease renewal terms.

Tenant's Initial Renewal Response?

- Yes - with proposed counter-offer
- Yes - Accepting proposed terms
- No - Declining renewal
- Undecided - Requires further discussion

Proposed Rent Increase (if applicable)

Enter a number...

Summary of Negotiation Discussions

Write something...

Negotiated Rent Adjustment?

Yes

No

Final Agreed Rent Amount

Enter a number...

Date of Agreement Signature

Enter date...

Notes on any concessions/incentives offered (e.g., free parking, minor improvements)

Write something...

Lease Documentation & Legal Review

Prepare the renewal lease agreement and ensure legal compliance.

Review Lease Renewal Clause Details

Write something...


Compliance Review (Local, State, Federal)

- Compliant
- Requires Modification
- Further Investigation Needed

Effective Date of Renewal Lease

Enter date...

Upload Attorney Review Document (if applicable)

 Upload File

Notes on Legal Review and Potential Risks

Write something...

Review of Rent Control/Stabilization Status

- Applicable
- Not Applicable
- Further Research Needed

Legal Reviewer Initials

Write something...

Tenant Acceptance & Signatures

Obtain the tenant's acceptance and signatures on the renewal lease agreement.

Tenant Signature

Date of Signature

Enter date...

Printed Name of Tenant

Write something...

Acknowledgement of Received Copy

- Yes, I received a copy
- No, I did not receive a copy

Tenant Comments (Optional)

Write something...

Record Keeping & Notifications

Update property records and notify relevant parties of the lease renewal.

Renewal Lease Execution Date

Enter date...

Notes on Renewal Discussion/Negotiation

Write something...

Renewal Rent Amount

Enter a number...

Lease Renewal Type

- Standard Renewal
- Month-to-Month
- Extended Term Renewal

Copy of Signed Renewal Lease Agreement

 Upload File

Notification Sent to Property Management Software (Details)

Write something...

Date of Tenant Notification of Renewal

Enter date...