



# Real Estate Portfolio Performance Review Checklist 2026

## Financial Performance & Revenue Analysis

Review of Gross Potential Rent (GPR), vacancy loss, and actual rental income versus budgeted projections for the fiscal year.

### Gross Potential Rent (GPR) Total

### Actual Rental Income Collected

### Vacancy Loss Amount

### Revenue Performance Status

- ☐ Above Budget
- ☐ At Budget
- ☐ Below Budget

### Variance Explanation

Write something...

### Monthly Profit & Loss Statement

 Upload File

## Operating Expense Audit

Detailed examination of controllable expenses including utilities, property taxes, repairs, maintenance, and management fees.

### Total Monthly Operating Expenses

Enter a number...

### Expense Variance Status

- ☐ Under Budget
- ☐ On Budget
- ☐ Over Budget

### Budget Variance Explanation

Write something...

### Expense Categories Reviewed

- ☐ Utilities
- ☐ Property Taxes
- ☐ Repairs & Maintenance
- ☐ Landscaping & Snow Removal
- ☐ Insurance Premiums
- ☐ Management Fees

### Expense Ledger/Receipts

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### Audit Completion Date

Enter date...

## Occupancy & Lease Lifecycle Review

Assessment of current occupancy rates, upcoming lease expirations, tenant retention metrics, and lease renewal probability.

### Current Occupancy Rate (%)

Enter a number...

### Next Lease Expiration Milestone

Enter date...

### Lease Renewal Status

- ☐ Renewed
- ☐ Pending Negotiation
- ☐ Notice to Vacate Received
- ☐ Expired/Vacant

### Tenant Retention Risk Factors

- ☐ Unresolved Maintenance Issues
- ☐ Rent Increase Impact
- ☐ Competitor Incentives
- ☐ No Identified Risk

### Lease Renewal Strategy Notes

Write something...

### Updated Rent Roll Document

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## Property Maintenance & Capital Expenditures

Evaluation of completed repairs, ongoing capital improvement projects, and the status of the 2026 preventative maintenance schedule.

### Last Scheduled Maintenance Date

Enter date...

### Total Capital Expenditure (CapEx) Spent YTD

Enter a number...

### Completed Maintenance Tasks

- ☐ HVAC Servicing
- ☐ Roof Inspection
- ☐ Plumbing Repairs
- ☐ Electrical Upgrades
- ☐ Landscaping/Grounds Care

### Summary of Major Repairs & Improvements

Write something...

### Maintenance Invoices & Receipts

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### Next Scheduled Capital Project Priority

- ☐ High Priority
- ☐ Medium Priority
- ☐ Low Priority

### Property Manager Approval

## Tenant Satisfaction & Retention Metrics

Analysis of resident turnover rates, volume of maintenance requests, and results from recent tenant satisfaction surveys.

### Current Tenant Retention Rate (%)

Enter a number...

### Total Number of Maintenance Requests Received

Enter a number...

### Average Response Time to Requests

- ☐ < 24 Hours
- ☐ 24-48 Hours
- ☐ 3-5 Days
- ☐ > 5 Days

### Summary of Recent Tenant Complaints

Write something...

### Top Drivers of Tenant Dissatisfaction

- ☐ Maintenance Delays
- ☐ Noise/Neighbor Issues
- ☐ Billing/Rent Errors
- ☐ Common Area Cleanliness
- ☐ Security Concerns

### Tenant Survey Results Report

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## Market Competitiveness & Rent Comps

Review of local market trends, competitor pricing analysis, and assessment of property positioning within the current economic climate.

### Primary Competitor Name

Write something...

### Competitor Average Rent (\$)

Enter a number...

### Market Trend Direction

- ☐ Increasing
- ☐ Stable
- ☐ Decreasing

### Competitor Amenity Comparison

- ☐ Fitness Center
- ☐ Smart Home Technology
- ☐ Parking/Garage
- ☐ Pet Friendly Policy
- ☐ In-unit Laundry

### Competitive Gap Analysis

Write something...

### Market Research Documentation

 Upload File

## Risk Management & Compliance Audit

Verification of updated insurance coverage, safety inspections, regulatory compliance, and mitigation of potential liability issues.

### Last Safety Inspection Date

Enter date...

### Compliance Certifications Verified

- ☐ Fire Marshal Permit
- ☐ Certificate of Occupancy
- ☐ Elevator Safety Certification
- ☐ Boiler/Pressure Vessel Inspection
- ☐ Backflow Prevention Test

### Insurance Policy Expiry Status

- ☐ Current & Active
- ☐ Expiring Soon (< 30 days)
- ☐ Renewal Required
- ☐ Action Needed

### Identified Liability Risks & Mitigation Plan

Write something...

### Upload Updated Insurance Certificate

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### Auditor Verification Signature

## Asset Value & Equity Assessment

Review of updated property valuations, debt-to-equity ratios, and long-term appreciation forecasts for the portfolio.

### Current Estimated Market Value per Asset

Enter a number...

### Outstanding Mortgage Balance

Enter a number...

### Calculated Net Equity

Enter a number...

### Property Valuation Trend

- ☐ Increasing
- ☐ Stable
- ☐ Decreasing

### Last Appraisal Date

Enter date...

### Supporting Valuation Documents

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# Equity Growth Strategy Notes

Write something...

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✔ Finish

✎ Generate Sample Report