

First-time landlord setup checklist

Best Landlord Software | Version 2026-10-15. Progress record only, not a legal result. No tenant identity needed.

Before advertising

- ☐ Check current local registration, licensing and rental requirements.
- ☐ Confirm the property's condition and the facts used in the listing.
- ☐ Set up separate rent, deposit and expense records.
- ☐ Write relevant lawful screening criteria before reviewing applications.

Applications and lease

- ☐ Check report package, payer and local application-fee rules.
- ☐ Use the provider's consent and identity process.
- ☐ Review report dates and possible errors; record the rental decision.
- ☐ Check required notices if a report affects adverse action.
- ☐ Check current lease terms and preserve the final signed copy.

Move-in and payments

- ☐ Record move-in condition and agreed access arrangements.
- ☐ Check deposit handling and record it separately from rent.
- ☐ Confirm the allowed rent route, payer and fee terms.
- ☐ Check the first charge and any recurring payment instruction.

Ongoing routine

- ☐ Match the tenant ledger to provider activity and the bank.
- ☐ Give tenants a clear repair and urgent-issue route.
- ☐ Keep a readable export and source documents for closed periods.
- ☐ Review account access and remove people who no longer need it.

Sources checked 2026-10-15: FTC consumer-report guidance, HUD fair-housing rights and IRS Publication 527. Verify current local requirements. Keep private evidence in your own secure files.

Return: <https://bestlandlordsoftware.com/first-time-landlord-checklist/>