



Syndicate Subscription Legal Plans

EVICITION SERVICES FOR LANDLORDS **CLIENT INTAKE QUESTIONNAIRE:**

DO NOT change the locks, remove the tenant's belongings, or shut off utilities — only the Sheriff may remove a tenant after a court judgment. Please contact us before accepting any rent after a notice has been served.

CONFIDENTIAL. This questionnaire is for property owners, landlords, and authorized property managers seeking to recover possession of residential or commercial property. Eviction laws are strict and vary by state and city; a small error in a notice can require starting over. Please answer completely and attach your lease and rent records. If a question does not apply, write "N/A." If unknown, write "Unknown."

NAME OF THE CLIENT (LANDLORD):

Client type:

☐ Individual owner

☐ LLC / corporation / partnership

☐ Trust

☐ Property manager (authorized agent)

☐ Full Legal Name / Entity Name: _____

Contact person & title: _____ **Syndicate Plan Member ID:** _____

Mailing Address: _____

City: _____ County: _____ State: _____ Zip: _____

Phone: _____ Email: _____

Preferred method of contact:

☐ Phone

☐ Text

☐ Email

PART 1 — SERVICES NEEDED

1.1 Check all that apply:

☐ 3-day pay-or-quit notice

☐ 3-day perform-or-quit notice

☐ Notice to quit (nuisance / illegal)

☐ 30 / 60 / 90-day termination notice

☐ Serve notice (process server)

☐ File eviction (unlawful detainer) lawsuit

☐ Serve summons & complaint

☐ Default judgment

☐ Trial (tenant filed an answer)

☐ Tenant demurrer / motion / bankruptcy

☐ Writ of possession & sheriff lockout

☐ Locksmith for lockout

☐ Money judgment & collection

☐ Cash-for-keys move-out agreement

☐ Commercial eviction

☐ Lease review / drafting

1.2 Briefly describe the situation: _____



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PART 2 — THE PROPERTY

2.1 Property address: _____ Unit: _____

City: _____ County: _____ State: _____ Zip: _____

2.2 Use:

☐ Residential

☐ Commercial

☐ Mixed-use

2.3 Property type:

☐ Single-family home

☐ Condo / townhouse

☐ Duplex / triplex / fourplex

☐ Apartment (5+ units)

☐ Room in owner's home

☐ ADU / guest house

☐ Mobile home / space

☐ Retail / office / industrial

2.4 Owner of record (exactly as on deed): _____

2.5 Year built / certificate of occupancy: _____ Units on the parcel: _____

2.6 Does the owner live on the property? ☐ Yes ☐ No

2.7 Is the property in a city or county with rent control or "just cause" eviction rules? ☐ Yes ☐ No

Many states and cities limit the reasons a tenant may be evicted, require specific notice language, require filing notices with a local agency, cap rent increases, or require relocation payments. We will review which rules apply.

2.8 Is the tenancy subsidized?

☐ Section 8 / housing voucher

☐ Public / affordable / tax credit housing

☐ Other subsidy

☐ None

2.9 Is the property in foreclosure, or was it recently purchased with the tenant in place? ☐ Yes ☐ No

PART 3 — THE TENANT(S)

Tenant / Occupant Name	On Lease?	Adult / Minor	Phone / Email	Employer (if known)

3.1 Are there subtenants or occupants you did not approve? ☐ Yes ☐ No

3.2 Move-in date: _____ Current monthly rent: \$ _____

Rent due date: _____ How rent is paid: _____

Security deposit held: \$ _____ Last rent increase (date / amount): _____

3.3 Rental agreement:

☐ Written lease (fixed term)

☐ Month-to-month (written)

☐ Oral agreement

☐ Lease expired / holdover



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- 3.4 Was the lease negotiated primarily in a language other than English? ☐ Yes ☐ No
- 3.5 Is any tenant on active military duty? ☐ Yes ☐ No
- 3.6 Has any tenant requested a disability accommodation? ☐ Yes ☐ No
- 3.7 Has any tenant contacted Syndicate for eviction help? ☐ Yes ☐ No

Conflict check: Syndicate cannot assist both the landlord and the tenant in the same matter.

PART 4 — REASON FOR EVICTION

4.1 Reason(s):

- | | |
|--|---|
| ☐ Nonpayment of rent | ☐ Lease violation |
| ☐ Nuisance / illegal activity | ☐ Refusal to allow lawful entry |
| ☐ Owner / family move-in | ☐ Substantial remodel / demolition |
| ☐ Withdrawal from rental market | ☐ Lease expired / no-fault termination |
| ☐ Commercial lease default | ☐ Other |

4.2 Describe the reason in detail (dates, what occurred, witnesses): _____

4.3 For a lease violation — was the tenant given a chance to correct it? ☐ Yes ☐ No

PART 5 — RENT LEDGER (NONPAYMENT CASES)

A pay-or-quit notice generally may demand ONLY unpaid rent — not late fees, utilities, damages, or other charges. List rent separately.

Month / Period	Rent Due \$	Amount Paid \$	Date Paid	Balance \$

5.1 Total unpaid RENT: \$ _____ Other charges (late fees, utilities): \$ _____

5.2 Have you accepted any partial payments since the tenant fell behind? ☐ Yes ☐ No

If yes, explain: _____

5.3 Did the tenant apply for rental assistance or claim a hardship? ☐ Yes ☐ No



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PART 6 — NOTICES & HISTORY

Notice Type	Date Served	How Served	Served By	Filed with City?

6.1 Tenant complained about repairs or code issues in past 12 months? ☐ Yes ☐ No

If yes, explain: _____

An eviction shortly after a tenant complains about conditions may be challenged as retaliation.

6.2 Are there any open code violations or habitability issues at the unit? ☐ Yes ☐ No

If yes, explain: _____

6.3 Has relocation assistance been offered or paid (if required)? ☐ Yes ☐ No

6.4 Have you previously tried to evict this tenant? ☐ Yes ☐ No

If yes, explain: _____

6.5 Any threats, police calls, or restraining orders with this tenant? ☐ Yes ☐ No

If yes, explain: _____

PART 7 — COURT CASE (IF ALREADY FILED)

7.1 Court / County: _____ Case Number: _____

7.2 Date tenant was served: _____ How served: _____

7.3 Status:

☐ No response yet

☐ Answer filed

☐ Demurrer / motion filed

☐ Bankruptcy filed

☐ Trial set

☐ Judgment entered

☐ Writ issued

7.4 Trial / hearing date: _____ Tenant's lawyer (if any): _____

If the tenant files bankruptcy, the eviction is generally paused. Do not take any further action until we review it.

PART 8 — COMMERCIAL TENANCIES

8.1 Business name / entity of tenant: _____

Lease term & expiration: _____ Personal guarantor: _____

8.2 Amounts due (rent, CAM, taxes, insurance): \$ _____



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8.3 Is the business still operating, or has the space been abandoned? ☐ Yes ☐ No

8.4 Does the lease require notice-and-cure periods or specific default procedures? ☐ Yes ☐ No

PART 9 — GOALS

9.1 What outcome do you want?

☐ Possession only

☐ Possession and money judgment

☐ Voluntary move-out / "cash for keys"

☐ Payment plan so tenant can stay

☐ Collect judgment after move-out

☐ Settlement / mediation

9.2 Maximum you would pay for a voluntary move-out: \$ _____

9.3 Target date to recover possession: _____

ACKNOWLEDGMENTS

Please check each item to confirm you understand.

☐ I will not lock out the tenant, remove belongings, or interrupt utilities; only the Sheriff may do so after judgment.

☐ I will not accept rent after a notice is served without first consulting Syndicate, as it may cancel the notice.

☐ I will comply with all state and local tenant protection laws, including any relocation or notice-filing requirements.

☐ The rent amounts and facts I provide are accurate. Demanding more than is owed can invalidate a notice and create liability.

PART 10 — DOCUMENT CHECKLIST

Please provide copies of the following, if available. Check each item you are including.

☐ Lease / rental agreement & addenda

☐ Rent ledger / payment records

☐ Notices already served & proof of service

☐ Deed or proof of ownership

☐ Property management agreement

☐ Photos of damage / violations

☐ Written complaints / tenant communications

☐ Section 8 / subsidy contract

☐ Court filings (if case filed)

☐ Commercial lease & guaranty



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Certification:

I declare that the information provided in this questionnaire is true, correct, and complete to the best of my knowledge, and that I am the owner of the property or am authorized to act for the owner. I understand this information is provided to Syndicate Subscription Legal Plans in confidence for the purpose of evaluating my eviction matter.

Signed and dated this ____ day of _____, 20__

Signature: _____

Print Name: _____

Title (if agent / entity): _____

Please Print and Email to STEVE@STEVEMUELLERLEGAL.COM, or
save this document as a PDF and email to STEVE@STEVEMUELLERLEGAL.COM,
Your information will be reviewed within one hour.