

PENNSYLVANIA HOUSING FINANCE AGENCY  
MANAGEMENT AGENT QUESTIONNAIRE  
PennHOMES Developments Only

Development: \_\_\_\_\_ PHFA No.: \_\_\_\_\_

Name of Management Agent: \_\_\_\_\_

**Management Agent Office Locations**

**Address:**

Principal Office:

\_\_\_\_\_

Other Offices:

\_\_\_\_\_

\_\_\_\_\_

Officer Names:

\_\_\_\_\_

\_\_\_\_\_

**Territory and Major Cities Covered:**

Principal Office:

\_\_\_\_\_

Other Offices:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Phone:**

Principal Office:

\_\_\_\_\_

Other Offices:

\_\_\_\_\_

\_\_\_\_\_

**Section I - General Information**

A. Indicate the legal nature of the management agent.

Corporation

\_\_\_\_\_

Partnership

\_\_\_\_\_

Proprietorship

\_\_\_\_\_

Other (specify)

\_\_\_\_\_

B. Is the management agent a subsidiary of another corporation? YES  NO

If yes, please provide name and address of parent corporation and describe relationship.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

C. If the management agent and/or its parent are engaged in business activities other than property management, please describe:

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D. How many years has the management agent been active in housing management?

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E. Is the firm a licensed Real Estate Broker in the state of Pennsylvania?

YES  NO

If yes, what is the Broker's License Number? \_\_\_\_\_

If no, is the Management Agent an entity of the owner? YES  NO

**Section II - Personnel**

A. List separately job titles and number of personnel employed by the management agent in the management office.

B. List the general qualifications you look for in property managers?

1. Education: \_\_\_\_\_

2. Previous Experience: \_\_\_\_\_

3. Other: \_\_\_\_\_

C. List the general duties of your property managers.

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D. List the qualifications you look for in community managers:

1. Education: \_\_\_\_\_

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2. Previous Experience: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3. Other: \_\_\_\_\_

E. List the general duties of your community managers:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Section III - Training**

A. Do you provide training for your property managers? YES  NO   
If yes, describe training: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

B. Do you provide training for your community managers? YES  NO   
If yes, describe training: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Section IV – Housing Management Experience**

A. Total number of residential units under your management: \_\_\_\_\_

Apartment Breakdown:      Garden \_\_\_\_\_  
   High-Rise \_\_\_\_\_  
   Mid-Rise \_\_\_\_\_  
   Townhouse \_\_\_\_\_  
   Other \_\_\_\_\_

B. Total number of low and moderate income housing units under your management.  
\_\_\_\_\_

Apartment Breakdown:      236 \_\_\_\_\_  
   Rent Supplement \_\_\_\_\_  
   221(d)(4) \_\_\_\_\_  
   221(d)(3) \_\_\_\_\_  
   Section 8 \_\_\_\_\_  
   LIHTC \_\_\_\_\_  
   Other \_\_\_\_\_

- C. Has a housing development experienced default while under your management?  
YES  NO  If yes, what was the cause of the default?

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- D. Has your firm ever been involved in an FHA 2530 proceeding?  
YES  NO  If yes, give details:

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- E. Complete the attachment listing information on all low or moderate income housing developments that you have managed within the last two years.

**Section V - Miscellaneous**

- A. Please list professional organizations, e.g., Institute of Real Estate Management, National Association of Home Builders, of which management agent is a member:

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- B. Please list any professional designations, e.g., Certified Property Manager, Registered Apartment Manager, or awards that management agent personnel have received:

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- C. Have any of the principals of the management agent ever been involved in bankruptcy proceedings? YES  NO  If yes, give details:

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- D. Does the firm have a fidelity bond? YES  NO   
If yes, state amount of bond and name of bonding company:

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E. Has management agent or any of its present personnel ever been denied a bond?

YES  NO

If yes, give details:

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F. Has management agent or any of its present personnel ever been involved in governmental or judicial action concerning a violation of "Fair Housing" Laws?

YES  NO

If yes, give details:

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G. Have you been involved in any matters within the jurisdiction of the Pennsylvania Human Relations Commission (PHRC) within the past five years?

YES  NO

If yes, give details:

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H. Have any property management contracts held by the management agent over the past five years been terminated prior to their expiration dates?

YES  NO

If yes, provide name(s) and address(es) of the development(s) and the mortgagor(s), as well as reasons and circumstances surrounding such termination(s):

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I. Have any property management contracts held by the management agent over the past five years not been renewed upon expiration?

YES  NO

If yes, provide name(s) and address(es) of the development(s) and the mortgagor(s), as well as reasons and circumstances surrounding such nonrenewal(s):

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I certify that the information contained herein is accurate and complete.

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Signature

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Title

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Date

MANAGEMENT AGENT QUESTIONNAIRE  
DEVELOPMENTS MANAGED

Development Name: \_\_\_\_\_

Address: \_\_\_\_\_

Number of Units: \_\_\_\_\_ Type of Financing: \_\_\_\_\_

Managed from: \_\_\_\_\_ to: \_\_\_\_\_

Property Manager: \_\_\_\_\_ Phone No.: \_\_\_\_\_

Owner: \_\_\_\_\_

Owner's Address: \_\_\_\_\_

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Development Name: \_\_\_\_\_

Address: \_\_\_\_\_

Number of Units: \_\_\_\_\_ Type of Financing: \_\_\_\_\_

Managed from: \_\_\_\_\_ to: \_\_\_\_\_

Property Manager: \_\_\_\_\_ Phone No.: \_\_\_\_\_

Owner: \_\_\_\_\_

Owner's Address: \_\_\_\_\_

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Development Name: \_\_\_\_\_

Address: \_\_\_\_\_

Number of Units: \_\_\_\_\_ Type of Financing: \_\_\_\_\_

Managed from: \_\_\_\_\_ to: \_\_\_\_\_

Property Manager: \_\_\_\_\_ Phone No.: \_\_\_\_\_

Owner: \_\_\_\_\_

Owner's Address: \_\_\_\_\_

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