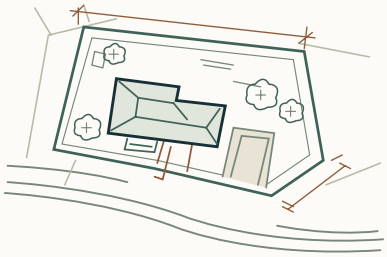
CLIENT FORMS / BLANK TEMPLATE

Client onboarding



Identify who can request and approve work at a property.

TEMPLATE VERSION
1.0

COMPLETED BY
Booking owner

Use the contact details that should appear on visit arrangements. If someone else pays the bills, identify the payer separately.

Details to complete

An asterisk marks a required entry.

Property address and unit or building *

Client or organization name *

Your role *
Owner / Tenant / Property manager / Condominium board representative / Authorized family representative / Other representative

Primary contact name *

Primary contact email *

Contact phone

Preferred contact method *
Portal message / Email / Phone

Person authorized to approve additional work *

Billing contact if different

Attestation

I have reviewed the completed information and terms and confirm this submission using my typed name.

Printed name and role

Signature and date