

Rental Deal First-Pass Checklist

Use this one-page checklist before you trust a rental deal. It helps you gather assumptions for Private Investment Deal Underwriter. It is not financial, tax, lending, or investment advice.

Property basics	☐ Address	☐ List price / asking price	☐ Property type + units	☐ Year built / major updates
Income	☐ Market rent	☐ Rent source / comps	☐ Current rent roll if occupied	☐ Rent confidence: low / medium / high
Financing	☐ Down payment	☐ Interest rate	☐ Loan term	☐ Closing costs
Operating costs	☐ Property taxes	☐ Insurance quote	☐ HOA / dues	☐ Utilities paid by owner
Reserves	☐ Vacancy	☐ Repairs	☐ Capex	☐ Property management
Condition	☐ Roof / HVAC / foundation	☐ Interior repairs	☐ Exterior repairs	☐ Initial rehab estimate

Quick first-pass math

Monthly rent	\$ _____
Minus mortgage payment	\$ _____
Minus taxes + insurance + HOA	\$ _____
Minus vacancy + repairs + capex + management	\$ _____
Estimated monthly cash flow	\$ _____
Cash needed to buy	\$ _____
Cash-on-cash return target	_____ %

Before you offer

- ☐ Verify rent with 3-5 nearby rentals, not only one Zestimate or AVM.
- ☐ Get an insurance quote before trusting cash flow, especially coastal or flood-risk markets.
- ☐ Use actual tax history or county assessment when available.
- ☐ Confirm loan terms with a lender before using a low-down or assumable scenario.
- ☐ Do not treat a first-pass screen as permission to buy. It only tells you what deserves more due diligence.

Private Investment Deal Underwriter: local rental, flip, and BRRRR analysis. Digital download sold by Ark Horizon Tools on Etsy.

Next step: [open Private Investment Deal Underwriter on Etsy](#)