

Desert Ridge Property Services

Stewardship for family portfolios across Arizona

SAMPLE · ILLUSTRATIVE ONLY

Scottsdale, AZ · (480) 555-0142

Owner portfolio job sheet

Ops briefing — who owns what · who lives where · what is open

Bill-to owner	Jordan Hale
Company	Hale Family Holdings LLC
Phone	(602) 555-0188
Email	jordan.hale@example.invalid
As of	12 July 2026 (sample)

Bill-to for all doors below: Jordan Hale

Property-level work (yard, roof, common area) charges this owner via each property. Owner ledger charges post only when a work order is **completed and billed**; open work shows expected cost as **pending**.

Portfolio at a glance

Properties	Units	Occupied / vacant	Open work orders
3	6	5 / 1	2

Properties

PID	Property	City	Type	Units	Occ.	Open WO
101	214 Maple Ave	Phoenix	multi-family	2	2	1
102	88 Bloom Court	Tempe	multi-family	2	2	1
103	12 Saddleback Ln	Mesa	multi-family	2	1	0

Units

Unit **WO** column = open work orders scoped to that unit only.

Property	Unit	Status	Tenant	Rent	WO
214 Maple Ave	1	occupied	A. Chen	\$2,100	1
214 Maple Ave	2	occupied	R. Ortiz	\$2,100	0
88 Bloom Court	A	occupied	M. Patel	\$2,400	0
88 Bloom Court	B	occupied	S. Nguyen	\$2,400	1
12 Saddleback Ln	A	occupied	L. Brooks	\$1,550	0
12 Saddleback Ln	B	vacant	—	\$1,550	0

Work orders

Open first, then recent completed. **Pending** = expected cost (not yet charged). **Billed** = posted to owner ledger after completion.

WO#	Property	Scope	Status	Description	Cost
452	214 Maple Ave	unit 1	assigned	GFCI outlets trip	Pending \$175
450	88 Bloom Court	unit B	in progress	Kitchen sink slow drain	Pending \$320
441	214 Maple Ave	property	completed	Roof leak (common)	Billed \$2,450
438	88 Bloom Court	unit B	completed	HVAC service	Billed \$735
429	12 Saddleback Ln	unit B	completed	Make-ready paint/clean	Actual \$890

WO 429 completed 8 Jul 2026 (after Q2) — not on the Q2 activity statement until billed. WO 438 and 441 were completed and billed in Q2 (see owner quarterly statement). Pending open total: **\$495** (memo only).

How to use this sheet

- **Yard / roof / common** — bill-to is the owner named above.
- **Who lives where** — unit roster.
- **What is still open** — status assigned / in progress with pending estimates.
- **Money story** — pair with the owner activity statement; only completed & billed WOs hit Net.