

Assistant Property Manager / Personal Assistant

Application Exercise

Your name: _____ **Date:** _____

Thanks for your interest. This exercise helps me understand how you think and work, not just what you already know. There are no trick questions — I am most interested in clear reasoning, attention to detail, and how you handle a task when not everything is spelled out.

A few notes:

- Please answer in your own words. Short and clear is better than long and polished.
- If something is missing or unclear in a task, please share how you would handle it.
- Feel free to ask questions along the way; how you ask is part of what I am looking at.

Part 1 — Google Sheets

Complete the skills test at spreadsheetclass.com/google-sheets-skills-test — Basic projects 1–4 and Intermediate projects 5–8.

Share the completed sheet with carrie170@hotmail.com.

Part 2 — Judgment

For each scenario, give your answer and a sentence on why.

Scenario 1

You are general support for a sales team. A team member, John, asks you to copyedit a document he wants to send to a prospective client about your firm's services.

True or False: Once you have copyedited it, you should send the document directly to the client.

Your answer:

Scenario 2

It is late on Friday. Your manager asked you to email three prospective clients to set up meetings early next week and forwarded you a template. She is now unreachable for the next several hours. Reviewing the template, you suspect it contains factual errors, though you would need to confirm. What do you do?

- Send the emails as-is.
- Message the manager and wait for her response before sending.
- Reach out to her administrative assistants to confirm before sending.
- Correct the potential errors yourself before sending.

Your answer:

Scenario 3

You work directly with a CEO. After a company meeting, they hand you their handwritten short-form notes from the speech they gave and ask you to turn them into an email to all

employees, including those who were not there. What is the most appropriate sequence of actions before the email goes out?

- Type up the notes, fill in the gaps from memory, copyedit, send.
- Type up the notes, reformat into long-form, copyedit, send.
- Type up the short-form notes word for word, send.
- Type up the notes, reformat into long-form, copyedit, send to the CEO for review, then send.

Your answer:

Scenario 4

I received the notice below recently. If I asked you to take care of it, what actions would you take, and what questions would you have?

APN # 075 1010 W

BERKELEY FIRE DEPARTMENT
2100 MARTIN LUTHER KING JR. WAY, 2ND FL.
BERKELEY, CA. 94704 (510) 981-5585

FIRE PREVENTION INSPECTION REPORT

MAILED
MAY 16

FIRE NO VIOLATIONS
BERKELEY FIRE DEPT.

Occupancy Address [REDACTED]		Business Name Fourplex		Phone # and/or E-mail	
Type of business [REDACTED]		Occupancy Group A B E F H I M R1/R2 R3 S U		City, Zip Alameda 94501	
Responsible Party Russell St.		Responsible Party's Address () Owner () Tenant () Property Mgr [REDACTED]		City, Zip Alameda 94501	
Type of inspection <input checked="" type="checkbox"/> Annual		Complaint () Bus. License () Other		<input type="checkbox"/> 1 st Notice <input type="checkbox"/> 2 nd Notice <input type="checkbox"/> Refer to F. P.	

NOTICE OF FIRE AND SAFETY HAZARDS AND/OR FIRE PERMITS REQUIRED

You are hereby notified that an inspection of your premises for the minimum fire and life safety requirements of the Berkeley Municipal Code Chapter 19.48, known as "The Berkeley Fire Code" and/or the provisions of the State law, has revealed the following violations:

ACCESS	EXTINGUISHERS	OCCUPANCY LOAD & ADDRESS
() Access to Bldg. Openings/Roofs 504	() Provide Extinguisher(s) 906.1	() Assembly Permit Required 105.6.37
() Provide a Knox Box 506.1	() Service & Tag Annually 906.2	() Post Address Numbers 505.1
() Update Keys In Knox Box 506.2	() Post Sign(s) 906.6	() Post Occupancy Sign 1004.9
() Elevator Recall Keys In Knox Box 605.7	() Mount 3.5' / 5' Height At Handle 906.9	
ALARM SYSTEMS / UTILITIES	FIRE RESISTIVE CONSTRUCTION	OUTDOOR / EXTERIOR
() Identification of Fire/Utility Equip. 509.1	() Repair Openings Walls/Ceilings 701.5	() Remove Waste/Vegetation 304.1.2
() Equipment Access 509.2		() Dumpster >1.5 cu yd. < 5' of Bldg 304.3.3
() Maintain In Operable Condition 907.8	FLAMMABLE LIQUIDS	() Remove Comb. w/in 10' of Pr. Line 315.4
() 1 yr. Inspection/Test 907.9.5	() Permit to Store/Handle 105.6.16	STANDPIPES, SPRINKLERS, FDC
() Provide Fire Alarm System 1103.7	() Provide Storage Cabinet(s) 5704.3.2	() 3' Min. Clear Around Hydrant 507.5.5
() Provide Smoke Alarms 1103.8	() Remove Near Exits 5704.3.3.3	M 1 & 5 yr. Inspect/Test (3 yr. Hose) 901.6
() Provide CO Detection 1103.9	() Maintain 15' Min. Clearance 5704.4.6	() Maintain Standpipe System 901.6
	GAS CYLINDERS (Compressed or Liquefied)	() Maintain Sprinkler System 903.5
	() Not Secured 5303.5.3	() Clear Access to FDC 912.4
	HAZARDOUS MATERIALS	() Provide FDC Caps 912.7
	() Haz/Mat Operational Permit 105.6.20	STORAGE
	() Provide Identification Sign 5003.5	() Comb. In Vacant Property 311.3
	HEAT PRODUCING APPLIANCES	() Maintain 24" Min. below Ceiling 315.3.1
	() Maintain Safe Clearance 305.1	() Maintain 18" Min. below Sprinkler 315.3.1
	INDOOR / SPECIAL EVENTS	() Comb. In Exits/Enclosures 315.3.2
	() Provide Crowd Control 403.2.4	() Comb. In Mech./Elect./Boiler 315.3.3
	() Inadequate Emerg. Vehicle Access 503	() Remove Storage Under Stairs 315.3.4
	() Treat Combustible Decorations with Flame Retardant 807	() High-Piled Storage Permits 105.6.22
	KITCHEN HOOD, DUCT & FAN	() High-Piled Storage Maintenance 3205
	() Clean Hood, Duct & Fan 607.3.3	() High-Piled Storage Fire Protection 3206
	() Hood System Service (6 mo.) 904.12.5.2	FIRE ESCAPE STAIRS & BALCONIES
	() Provide Class K Extinguisher 906.4.2	() 5 yr. Inspection # 1104.16.5.1
	NATURAL GAS	() Maintain Fire Escape(s) 1104.16.7
	() Protect Aboveground Meter 603.9	OTHER
		() Permit(s) Required 105.1.1
		() Obtain Current Bus. Lic. BMC 9.04.035

Min. = Minimum; Comb. = Combustibles

Additional Comments: *Service (4) tag standpipe
Same violation in 2020. Standpipes should be inspected, tested, & maintained every year and every 5-years.*

See attached supplemental form

ORDER TO COMPLY: As the above conditions are contrary to law, you are hereby required to correct said conditions immediately upon receipt of this notice. A re-inspection to determine whether you have complied with this notice will be conducted after 30 days. Failure to correct the violations identified on this form will constitute an infraction of the law under City of Berkeley Municipal Code 19.48, and may result in the issuance of a citation, which may require your appearance in court, and a fine of up to \$500.00 for each violation every day the violations remain uncorrected. If you have any questions regarding the inspection, please contact the inspector below at the listed telephone number.

Thank you for your cooperation.

Signature (person receiving report)	Inspector (Print)	Date of Insp.	Company	Shift	Telephone (510)
	C. Rodriguez	5.7.23	TS	MD(B) (C) (D)	981-5550

Fire Prevention
rev. 12/2019

Your answer:

Part 3 — Practical tasks

These are short, realistic versions of the day-to-day work.

Task 1 — Set up a meeting

I'd like to have a 30-minute call next week with a prospective tenant who is interested in one of our furnished units. Can you set it up? Show me exactly what you would do and paste any message or invite you would send.

Your answer:

Task 2 — Monday morning

The following all come into your inbox/texts one morning. Tell me: (1) the order you would handle them, (2) what you would do or draft for each, and (3) anything you would flag to me or hold for later.

1. A long-term tenant texts that they have had no hot water since last night.
2. A contractor texts that he needs to know which tile to order by end of day, or the bathroom remodel slips a week.
3. An Airbnb guest messages asking about parking and whether they can check in early — they arrive tomorrow.
4. The plumber's invoice comes in at \$1,450. The quote I approved was \$1,150.
5. The city emails that a permit needs one additional document submitted within 10 days.
6. I had asked you earlier in the week to research Berkeley tenant relocation guidelines for a unit; it is due "this week."

Your answer:

Task 3 — Draft a tenant notice

Please draft a notice to the tenants of one of our Berkeley buildings letting them know the water will be shut off for scheduled plumbing repairs. Send me the draft you would post.

Your answer:

Task 4 — Learn and apply

Here is the short process I use for a standard maintenance request:

- 1) Acknowledge the tenant within 24 hours. 2) Get specifics and, if helpful, a photo. 3) Schedule the right vendor. 4) Confirm the appointment window with the tenant. 5) Follow up after to confirm it was resolved, and log it.

Now apply it to this situation, adapting where the steps don't fit cleanly: An Airbnb guest who is mid-stay (checking out in two days) messages at 8pm that the bathroom sink is draining slowly. Walk me through what you would do.

Your answer:

Part 4 — A little about you

In a few sentences:

1. Describe a time you made a mistake and how you handled it.

2. Describe a problem you ran into at work and how you approached it.
3. Describe a time you experienced conflict and how it was resolved.

When you're done, share the Sheet with carriehuie@gmail.com and send the rest back in whatever format is easiest for you. Thank you for your time!

Detail on the role for reference:

I wanted to share a little more information about me and this role. I'm a mom of four kids 5 to 18 yrs old and have been slowly building up my real estate portfolio for the past 6-7 years while working full-time in corporate retail. After leaving my W2, I now have a retail consulting business with a small team and am also managing our 40-unit portfolio on my own. Abt 27 of the units are long-term and 13 are mid-term through Airbnb, with 1-6 month furnished leases, but I may be transitioning some of the short-term units into long-term. I had a property manager for one of the buildings until early 2023, their attention to detail was lacking with tenants, and in accounting, so it was time to part ways. It's a lot to manage all the tenant communication, lease new units and also manage things like remodels which is why I'm hoping I can find help.

This role will just be working with me. There isn't a larger company at this time but I'm thinking through what the next phase of expansion is and there may be more then but I wouldn't count that in the decision of whether to work with me or not. I'm pretty easy going to work with but also hold myself to high standards on quality of work and communication and want to work with people who are like-minded. I also move quickly and jump back and forth between topics that are high level like where's the real estate market going, what are rates anticipated to be and how would a 1031 exchange fit into that, to very detailed things like what size trap is best to reduce the likelihood of toilets clogging. Some people may be ok with this while others may find it too difficult to work with which I understand. Lastly, there is no structure right now, a lot lives in my head and this is a period of scaling where I need help putting processes in place to allow for additional growth into the next phase. Again, some people may be very uncomfortable with the lack of structure and fluidity, while others can flex with this.

The primary responsibility of the role will be to own day-to-day tenant communication with tenants and service people along with reminding me/ keeping us moving/ holding me accountable to other mid-term and long-term projects like smaller and larger remodels that are on the horizon, figuring out an accounting system, scaling all processes, figuring out how to find investors, etc.

If the position interests you, I'm asking applicants to complete/ fill out the attached as the next step in the interview process. Then I'd suggest a phone call and potentially meeting in-person in Alameda. If this isn't of interest, that's ok, too, and I very much appreciate your time.

Here's the original posting:

Assistant property manager/ personal assistant (alameda)

job title: Assistant property manager/ personal assistant

telecommuting ok

Looking for help managing properties and with household tasks. I'm a mother balancing a retail consulting business and growing a real estate portfolio. I have a team on the consulting business already so am now looking for help with the real estate and home organization. This is a great opportunity for someone who wants to learn real estate from an experienced investor. Over the next 9-12 months, we'd be working through a large remodel gutting and restoring a Victorian and a 1031 exchange buying a new property, in addition to the day-to-day management of several properties and tenants, including both short-term and long-term rentals.

- Looking for positive, proactive, problem-solver who isn't afraid to ask questions. Should be professional, organized, reliable, clear and concise communication, open to feedback (and I am, too)
- This role is working with me supporting my personal portfolio, it isn't working with a larger company. I'm looking for someone to fully take on and own the day-to-day management so that I have more mental space and capacity to work on growing the portfolio
- Please have a high sense of urgency. Quick communication and follow-up is important but may be too fast-paced for those coming from slower environments. For example:
 - I reply to texts/ emails within a few hours if not sooner
 - Tenant replies within 24-48 hours and requests resolved within 2-3 days
 - Airbnb replies within 24 hours
 - Replies to contractors, architect, permit questions should happen within a few hours or same-day to keep the process moving quickly
- To be very transparent, which I always try to be, I'm both easy-going to work with but also intense. I have a high standard for how my businesses are run and look for strong professionalism and transparency. It takes a lot to manage a large family with young kids while balancing multiple businesses. I work really well with organized professionals who are self-starters and have the ability to see the bigger picture and anticipate what's next, can take a project, ask a bunch of questions, and then take it and run. This wouldn't be a good fit for someone who needs constant direction.
- Training provided will be on-the-job training. It is a steep learning curve so patience and flexibility is important
- Ability to adapt and be comfortable in an unstructured environment. There aren't clear processes or organization in place currently, which is what I need help with. A lot of the information is in my head so it will take some time and patience transferring the knowledge over.
- Interest in learning real estate. I'm willing to teach/ mentor someone who is interested
- Preferred experience would include some exposure to real estate, project management, executive assistant
- Majority of this can be done remotely. I tend to stop working around 3p once kids are out of school and am online sporadically after

- Schedule is flexible, most of the work can be done independently on your schedule but does require going to properties approx once every week or two on weekdays or weekends based on turnover schedule

Detailed examples of responsibilities include:

- Properties, day-to-day

- o Tenant communication – Managing maintenance requests, replying within 24-48 hours
- o Replying to tenants on Airbnb within 48-hours
- o Sending welcome messages, check-in/ check-out
- o Coordinating with cleaners during turnovers
- o Visiting units between turnovers to check what's needed
- o Coordinating time/ services with plumbers, handymen, electricians, appliance repair, etc
- o Going to Target or online to buy towels, toilet paper, extra sheets, etc.
- o Going on Craigslist, FB marketplace to find furniture
- o Posting rental ads as vacant units come up, replying to applicants, scheduling showings
- o Reconciling rent payments

- Properties, process-related

- o Helping me put processes in place to make things run more smoothly and efficiently
- o Researching systems/ platforms for more efficient management, and at scale
- o Help onboard to those systems
- o Researching answers to random things like Berkeley tenant relocation guidelines, Berkeley capital improvement calculations, when and how can 3-day notices be given after the moratorium, etc. by calling local landlord associations, city departments, googling guidelines

- Properties, project management during remodels

- o Coordinating timelines
- o Pulling permits with city
- o Preparing/ distributing notices to tenants
- o Coordinating contractors, architects, everyone. Scheduling appointments, joining appointments for follow-ups

Not part of responsibilities but will have exposure to and opportunity to learn - how to manage a real estate portfolio, work with tenants, rent control rules, Airbnb, creating floorplans, city permit process, dealing with housing authority, Section 8, leases and rental contracts, local landlord

associations, working with contractors, working with a designer, shopping for materials, how to list and sell a property, how to evaluate purchasing a new property, how to evaluate looking at a market, the 1031 exchange process, the purchase process, onboarding a new building