

BE #1
IN YOUR MARKET
WITH THE
ONE



REALTY ONE GROUP

Take Over

320

AWARDS WON

136

FIRST PLACE POSITIONS
WON IN TOTAL

25%

AGENTS RECOGNIZED IN MORE
THAN ONE category!

ROG RESULTS
Agent
Checklist

BUNDLE

LET'S GET ORGANIZED



Listing Appointment Checklist

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- Do your research! Learn the history and details of the property and the neighborhood
- Provide local market statistics fact sheet
- Complete a Comparative Marketing Analysis (CMA) for sellers
- Call sellers to confirm the time and location of the appointment
- Dress professionally and arrive on time!
- Listing Presentation - explain why the seller should trust you with the sale
 - Your experience
 - Past production numbers - proof of success!
 - Testimonials
 - Local market expertise
 - Marketing plan
- Open discussion on sellers' goals, timing, and pricing strategy
- Documents in a branded folder with pen
 - Property Contact Worksheet
 - Listing Agreement
 - Property Disclosure
 - HOA Disclosure
 - Lead Paint Disclosure (homes built before 1978)
 - State and Local Required Disclosures
 - Seller Prepare Home for Sale Checklist
 - Seller Home Showing Checklist
 - Business cards
- Property tour - note features and improvements on Property Tour Checklist

Property Contact Worksheet



SELLER INFORMATION

Seller #1

Seller Name _____
Seller Address _____
Seller Country _____
Seller Phone _____
Seller Mobile Phone _____
Seller Email _____

Seller #2

Seller Name _____
Seller Address _____
Seller Country _____
Seller Phone _____
Seller Mobile Phone _____
Seller Email _____

PROPERTY INFORMATION

Property Type

- Residential
- Multi-Family
- Vacant Land
- Commercial
- Other

Full Property Address _____
Legal Description _____
Lot Number _____
Subdivision _____
Year Built _____

MORTGAGE

Mortgage Company Name _____
Address _____ Phone _____
Balance _____ Monthly Payment _____
Taxes and Insurance (escrow) _____

HOMEOWNER'S INSURANCE

Company _____
Policy Number _____ Annual Premium _____
Agent's Name _____ Phone Number _____
Email _____

Property Tour Checklist (con't)



Rooms

- Attic/Storage
- Appliances
- Heating System
 - Natural Gas
 - Electric
 - Propane
- Cooling System
 - Natural Gas
 - Electric
- City Sewer and Water
- Septic and Private Well Water

Notes

EXTERIOR FEATURES

Material

- Brick
- Stone
- Siding
 - Wood
 - Aluminum
 - Composite
- Shingle

Improvements

Property Tour Checklist (con't)



Windows

- Wood
- Fiberglass
- Aluminum

Roof

- Material:
- Age: _____ years

Gutters

Porch/Deck/Patio

- Front
- Back

Landscape

Irrigation System

Improvements

Seller Marketing Plan Checklist

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- MLS listing on key portals
- Professional photos
- Virtual tour
- Drone footage
- Property website with photos, tour and blog content
- Yard sign with flyer box
- Lock box with digital access
- Custom Feature Sheet - print and digital
- Listing promoted to an extensive network of local real estate agents
- Home staging advice
- Brokerage office/team promotion
- Real estate broker/agent caravan tour of the property
- Open house with directional signs
- Postcard, direct mail to neighborhood
- Personal open house invitation to 20 immediate neighbors
- Post listing on Facebook and Instagram business pages
- Advertise listing on Facebook, Twitter, Instagram, YouTube, Google, Craigslist
- Weekly status update calls on pricing and market changes
- Forward all feedback from showings
- Updates on new listings, under contracts, and sales in your community

Prepare Home For Sale Checklist



Although significant renovations are not recommended before listing for sale, some preparations could sell your home faster at a higher price. In addition, potential buyers want to visualize themselves living in the space, so provide the blank slate where they can dream!

- Paint - neutral tone
- Cleaning - deep clean all areas, including carpeting
- Odors - smell check for pet and tobacco smoke odors
- De-Clutter - purge and organize shelves, cabinets and closets
- De-personalize - remove personal items, family photos, medications and religious artifacts
- Let the light shine in! - clean windows and make sure all lighting is functional
- Home staging - focus on living areas, kitchen, and the main bedroom and bath
- Curb appeal - hire a landscaper to trim, mow and mulch property; remember to maintain until closing
- Pest control - a pre-listing inspection will avoid unwanted surprises during showings

Home Showing Checklist



Outside

- Sweep the porch and remove any cobwebs
- Shake off the doormat
- Clean front door glass

Inside Your Home

- Turn on all lights, put up shades, and open blinds and curtains
- Pick up clutter and hide it
Tip: A plastic storage tote or laundry basket works well for this job
- Vacuum or dust-mop high-traffic areas
- Light mildly fragrant candles; extinguish the candle before departing
- Close all closet doors

Pets

- Remove pets from the home - at the very least, make sure they are secured
- Store away bowls, beds and toys
- Move litter boxes out of the house

Main Living Areas

- Vacuum carpets
- Dust table tops
- Tidy up pillows and seat cushions
- Stash remotes and other electronics
- Straighten accent items and books

Kitchen

- Put dirty dishes in the dishwasher
- Wipe down counters, sink, and appliances
- Empty the trash
- Toss some citrus into the running garbage disposal to eliminate odors

Bedrooms

- Vacuum carpets
- Dust and declutter nightstands
- Make the beds
- Store laundry out of sight

Bathrooms

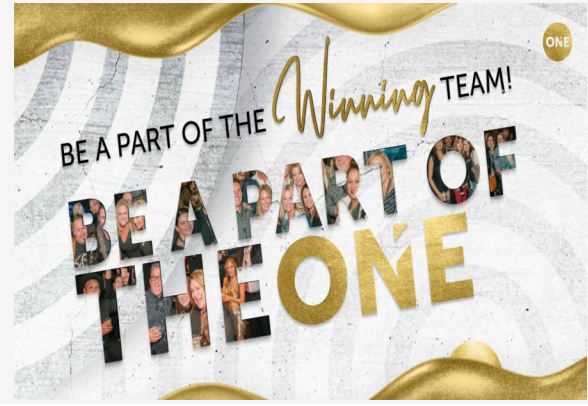
- Give toilets a quick scrub with a brush and cleaner
- Wipe off counters, sinks, and hardware
- Clean the floor
- Set out new towels, washcloths, soaps, and toilet paper
- Empty the trash

Open House Materials Checklist



- Agent business cards
- Agent branded brochure
- Property Feature sheets
- Home Features in 8 x 10 photo frame
- Property and HOA disclosures
- Agency agreements
- Blank Offer to Purchase contracts
- Sign-in sheet - paper or digital (iPad or tablet)
- Open house sign - front lawn
- Branded open house directional signs
- Balloons for sign
- Branded giveaway items (pens, notepads, magnets)
- Packaged snacks and water bottles
- Lightly scented candles
- Speaker - playlist from smart phone
- Folding chairs and table for vacant properties
- Laptop and cellphone
- Safety first! - a companion agent, friend or family member

Mortgage Pre-Approval Checklist



Here's a list of documents you will need to become pre-approved and begin the mortgage approval process:

- Identification:** A driver's license or state-issued ID card, passport, or military ID
- Federal Tax Returns:** last two years
- W-2 / 1099 / K-1 Statements:** last two years
- Payroll Statement:** previous 60 days
- Profit and Loss Statements:** business owners
- Asset Statements:** checking/savings accounts, retirement/401k/IRA accounts, investment portfolios
- Current Mortgage Statement:** if applicable
- Property Tax Statements:** if applicable

STAYING PRE-APPROVED

Once pre-approved, do not change any elements of your financial profile without consulting your lender. Any of the following changes could lead to the invalidation of the pre-approval letter during the home purchase process:

- Change in employment
- Opening or closing of credit card or bank accounts
- Late payment of monthly bills or debt payments
- Purchasing a car or other large ticket items with a loan
- A deposit or withdrawal of an unusually large amount of money from bank accounts

Homebuyer's Timeline



12 MONTHS

- Check your credit history and make credit repairs

9 MONTHS

- Learn about mortgage application and required documents

6 MONTHS

- Determine budget and get mortgage pre-approved
- Interview and hire a licensed real estate agent
- Consider your ideal type of home and location

3 MONTHS

- Conduct home search with your agent

2 MONTHS

- Calculate your best offer
- Hire settlement agent and other service pros
- Submit offer to purchase and contract
- Negotiate final price of home
- Apply for mortgage and homeowner's insurance upon offer acceptance
- Conduct home inspections

1 MONTH

- Review and negotiate necessary repairs
- Hire movers and begin packing
- Purchase homeowner's insurance policy

1 WEEK

- Conduct final walkthrough with your agent
- Review closing documents and prepare funds transfer
- Attend settlement with your agent
- Move in to your new home!