

### PRE-MEETING BUYER

- Get Preapproval Letter (or)
- Get Proof Of Funds
- Copy of Driver's Lic (Especially If Never Met!)
- Simple Google Search Prospect (You Never Know)

### BUYER FIRST MEETING

- Meet or Phone Discussion For All Real Estate Needs / Wants
- Discuss Buyer Broker Agreement, if any.
- Provide Buyer Your Personal Brochure, Etc.

### BUYER POST MEETING

- Scout Properties Matching Criteria
- Set Appointments To Preview (Without Buyer If Enough Time)
- Set Appointments For Showings
- Meet Prospect At Office or First Property
- Provide Property Flyer / Details
- Consider Brining Cooler With Water / Snacks
- Ask Questions Opinion Of Property / Encourage Note Taking & Pictures
- Write & Negotiate Offer
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### IN CONTRACT

- Email Executed Docs To All Parties (Buyer, Mortgage, Closing Agent, Etc.)
- Confirm Buyer Submitted Escrow
- Confirm All Parties Received Executed Docs & Set File
- Internal Broker File Set Up
- Add Important Dates (Below) In Your Calendar
- Confirm Buyer Submitted Full Application With Lender
- Follow Up Lender (Below)
- Follow Up Escrow Deposit Receipt
- Arrange Inspection / Access (General, Termite, Radon, Septic, Etc)
- Arrange Appraiser Access

<input type="checkbox"/>	Review Inspection Report With Buyer
<input type="checkbox"/>	Renegotiate credit / repairs, if any. Get in writing before inspection expiration
<input type="checkbox"/>	Provide Buyer Checklist For Set Up (IE - Insurance, Electric, Cable, Etc)
<input type="checkbox"/>	Walkthrough
<input type="checkbox"/>	Closing
<b>POST CLOSING</b>	
<input type="checkbox"/>	Verbally Ask For Referrals (Who Do You Know Could Use My Services)
<input type="checkbox"/>	Provide Closing Gift
<input type="checkbox"/>	Follow Up 3 Days Later (Ask about overall experience & Online Review)
<input type="checkbox"/>	Add to CRM
<input type="checkbox"/>	60 Days Mail A Small Gift Or Card
<input type="checkbox"/>	Put Them In Sphere Of Influence Follow Up Program
<b>IF FINANCING</b>	
<input type="checkbox"/>	Follow Up Lender (First 24 Hours) Confirm Receipt Of Contract
<input type="checkbox"/>	Follow Up Lender (Day 3) Confirm Complete Application / Any Issues
<input type="checkbox"/>	Follow Up Lender (Day 7) Progress Update
<input type="checkbox"/>	Follow Up Lender (Day 15) Progress Update
<input type="checkbox"/>	Follow Up Lender (Day 22) Progress Update
<input type="checkbox"/>	Follow Up Lender (Day 30) Update Loan Commitment
<b>IMPORTANT DATES</b>	
<input type="checkbox"/>	Executed Date:
<input type="checkbox"/>	Escrow (1st Deposit):
<input type="checkbox"/>	HOA Application:
<input type="checkbox"/>	HOA Doc Receipt:
<input type="checkbox"/>	Escrow (2nd Deposit):
<input type="checkbox"/>	Prior Policy / Survey:
<input type="checkbox"/>	Inspection Deadline:
<input type="checkbox"/>	Financing Contingency:

<input type="checkbox"/>	Walkthrough Date:
<input type="checkbox"/>	Close Date:
<input type="checkbox"/>	Other:
<input type="checkbox"/>	Other: