

### PRE-LISTING ACTIVITIES ////

- **1.** Make appointment with seller for listing presentation
- Send seller a written or e-mail confirmation of listing appointment and call to confirm
- **3.** Review pre-appointment questions
- **4.** Research all comparable currently listed properties
- 5. Research sales activity from Local MLS Broker Marketplaces and public records databases
- 6. Research Average Days on Market for property of this type, price range, and location
- Download and review property tax roll/assessor information
- 8. Prepare preliminary Comparable
  Market Analysis (CMA) to establish
  fair market value
- 9. Obtain copy of subdivision plat/ complex lay-out
- **10.** Research property's ownership and deed type
- 11. Research property's public record information for lot size and dimensions

- 12. Research and verify legal description
- **13.** Research property's land use coding and deed restrictions
- **14.** Research property's current use and zoning
- **15.** Verify legal names of owner(s) in county's public property records
- **16.** Prepare listing presentation package with above materials
- **17.** Perform exterior Curb Appeal Assessment of subject property
- **18.** Compile a formal file on property
- **19.** Confirm current public schools and explain impact of schools on market value
- **20.** Review listing appointment checklist to ensure all steps and actions are completed
- 21. Review Obsolete Property Rehabilitation Act (OPRA) Report from Township for all permitted records
- 22. Add client into your database



## LISTING APPOINTMENT PRESENTATION

- **23.** Give seller an overview of current market conditions and projections
- **24.** Tour property
- **25.** Review agent's and company's credentials and accomplishments in the market
- **26.** Present company's profile and position or niche in the marketplace
- 27. Present preliminary CMA to seller, including comparable properties, sold properties, current listings, and expired listings
- **28.** Offer pricing strategy with updates to CMA based on tour of home and updates, upgrades professional judgment, and current market conditions
- **29.** Discuss goals with seller to market effectively
- **30.** Explain market power and benefits of Local MLS Broker Marketplaces
- **31.** Explain market power of web marketing, IDX and REALTOR.com
- **32.** Explain the work you do behind the scenes and your availability on weekends
- **33.** Explain role in screening for qualified buyers and protect seller from curiosity seekers
- **34.** Present and discuss strategic master marketing plan
- **35.** Explain transaction/agency brokerage relationship

- **36.** Review and explain all clauses in listing contract and addendum, then obtain seller's signature once property is under listing agreement
- 37. Review current title information
- **38.** Gather square footage/measure overall and heated square footage as required
- 39. Measure interior room sizes
- **40.** Confirm lot size via owner's copy of certified survey, if available
- **41.** Note all unrecorded property liens, agreements, easements
- **42.** Obtain house plans, if applicable and available
- 43. Review house plans and make copy
- **44.** Prepare showing instructions for buyers' agents and showing times with seller
- **45.** Discuss possible buyer financing alternatives and options with seller
- 46. Review current appraisal if available
- **47.** Identify Homeowner Association manager if applicable
- **48.** Verify Homeowner Association Fees with manager—mandatory or optional, plus fees
- **49.** Order copy of Homeowner Association bylaws, if applicable
- **50.** Research electricity availability, supplier's name, and phone number

## LISTING APPOINTMENT PRESENTATION (CONTINUED)

- **51.** Have utility companies provide average utility usage from last 12 months of bills
- **52.** Research and verify city sewer/septic tank system
- **53.** Calculate average water fees or rates from last 12 months of bills
- **54.** Confirm well status, depth and output from Well Report
- **55.** Natural Gas: Research/verify availability, supplier's name, and phone number
- **56.** Verify security system, current terms of service and whether owned or leased
- **57.** Verify if seller has transferable Termite Bond
- **58.** Ascertain need for lead-based paint disclosure
- **59.** Prepare detailed list of property amenities and assess market impact
- **60.** Prepare detailed list of property's inclusions and conveyances with sale

- **61.** Compile list of completed repairs and maintenance items
- **62.** Send vacancy checklist to seller if property is vacant and register the property with the township if it is vacant or a rental home
- **63.** Explain benefits of Homeowner Warranty to seller
- **64.** Assist sellers with completion and submission of Homeowner Warranty Application
- **65.** Place Homeowner Warranty in property file for conveyance at time of sale
- **66.** Have extra key made for lockbox and one for your file
- **67.** Verify if property has rental units involved.
- **68.** If the property does have rental units, make copies of all leases for retention in listing file
- 69. Verify all rents and deposits
- **70.** Inform tenants of listing and discuss how showings will be handled



## LISTING APPOINTMENT PRESENTATION (CONTINUED)



- 71. Arrange for installation of yard sign
- 72. Complete new listing checklist
- **73.** Review curb appeal assessment and provide suggestions to improve saleability
- **74.** Review interior décor assessment and suggest changes to shorten time on market
- **75.** Load listing into transaction management software program
- **76.** Prepare Local MLS Broker Marketplaces Profile Sheet
- 77. Enter property data from Profile Sheet into Local MLS Broker Marketplaces Database
- **78.** Proofread Local MLS Broker Marketplaces database listing for accuracy—including proper placement in map
- **79.** Add property to company's active listings list
- **80.** Provide seller copies of the listing agreement and Local MLS Broker Marketplaces Profile Sheet within 48 hours or within the time period of Local MLS Broker Marketplace guidelines
- **81.** Take additional photos for upload into Local MLS Broker Marketplaces and use in fliers
- **82.** Create print and internet ads with seller's input
- **83.** Coordinate showings with owners, tenants, and other agents.

- 84. Return all calls
- **85.** Install electronic lock box if authorized. Program agreed-to showing times
- 86. Prepare mailing and contact list
- **87.** Generate mail-merge letters to contact list
- 88. Order Just Listed labels and reports
- 89. Prepare fliers and feedback reports
- **90.** Review comparable Local MLS Broker Marketplaces regularly to ensure property remains competitive
- **91.** Prepare property marketing brochure for seller's review
- **92.** Arrange for printing or copying of marketing brochures or fliers
- **93.** Place marketing brochures in all company agent mailboxes
- **94.** Upload listing to company and agent Internet site, if applicable
- **95.** Mail out *Just Listed* notice to all neighborhood residents
- **96.** Advise network referral program of listing
- **97.** Provide marketing data to buyers through international relocation network buyers
- **98.** Provide marketing data to buyers coming from referral network
- **99.** Provide *Special Feature* cards for marketing, if applicable



## LISTING APPOINTMENT PRESENTATION (CONTINUED)

- **100.** Submit ads to company's participating internet real estate sites
- **101.** Price changes conveyed promptly to all internet groups
- **102.** Reprint/supply brochures promptly as needed
- **103.** Feedback e-mails sent to buyers' agents after showings
- 104. Review weekly market study

- **105.** Discuss with sellers any feedback from showings to determine if changes are needed
- **106.** Set up marketing reports on showing-time application and company website
- **107.** Place regular weekly update calls to seller to discuss marketing and pricing
- **108.** Promptly enter price changes in the Local MLS Broker Marketplaces database



### OFFERS ////

- **109.** Receive and review all *Offer to Purchase* contracts submitted by buyers' agents.
- 110. Evaluate offer(s) and prepare a net sheet for the owner for comparison purposes
- **111.** Explain merits and weakness of each offer to sellers
- **112.** Contact buyers' agents to review buyer's qualifications and discuss offer
- 113. Deliver *Seller's Disclosure* to buyer upon request and prior to offer if possible. Upload to the Local MLS Broker Marketplaces additional documents at time of listing
- **114.** Confirm buyer is pre-qualified by calling loan officer

- **115.** Obtain buyers' pre-qualification letter from loan officer if not submitted with offer
- **116.** Negotiate all offers per seller's direction on seller's behalf, set time limit for loan approval and closing
- 117. Prepare and convey counteroffers, acceptance or amendments to buyer's agent
- **118.** Create excel spreadsheets for easy review on multiple bids
- **119.** Email or send copies of contract and all addendum's to the closing attorney or title company
- **120.** When *Offer to Purchase* contract is accepted, deliver to buyer's agent

### CONTRACTS ////

- **121.** Record and promptly deposit buyer's earnest money in escrow account
- **122.** Disseminate under-contract showing restrictions as seller requests
- **123.** Deliver copies of fully signed *Offer to Purchase* contract to seller
- **124.** Deliver copies of *Offer to Purchase* contract to lender
- **125.** Provide copies of signed Offer to Purchase contract for office file
- **126.** Advise seller of additional offers submitted between contract and closing

- **127.** Change status in Local MLS Broker Marketplaces to *Sale Pending*
- **128.** Update transaction management program to show *Sale Pending*
- **129.** Provide credit report information to seller if property will be seller-financed
- **130.** Assist buyer with obtaining financing, if applicable, and follow-up as necessary
- **131.** Coordinate with lender on discount points being locked in with dates

#### INSPECTIONS ////

- 132. Deliver unrecorded property information to buyer
- 133. Order septic system inspection, if applicable
- 134. Receive and review septic system report, and assess any possible impact on sale
- 135. Deliver copy of septic system inspection report lender and buyer
- 136. Deliver Well Flow Test Report copies to lender and buyer, and property listing file
- 137. Verify termite inspection ordered
- 138. Verify mold inspection ordered, if required
- 139. Confirm verifications of deposit and buyer's employment have been returned
- **140.** Follow loan processing through to the underwriter
- **141.** Add lender and other vendors to your management program so agents, buyer, and seller can track progress of sale
- 142. Contact lender weekly to ensure processing is on track
- 143. Relay final approval of buyer's loan application to seller



#### \\\\ HOME INSPECTIONS

- **144.** Coordinate with seller for buyer's professional home inspection
- 145. Review home inspector's report
- **146.** Enter completion into transaction management tracking program
- **147.** Explain seller's responsibilities, and recommend an attorney interpret any clauses in the contract
- **148.** Ensure seller's compliance with *Home Inspection Clause* requirements
- **149.** Assist seller with identifying contractors to perform any required repairs
- **150.** Negotiate payment, and oversee all required repairs on seller's behalf, if needed



### **THE APPRAISAL**



- 151. Schedule appraisal
- **152.** Provide to appraiser any comparable sales used in market pricing
- 153. Follow-up on appraisal

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## PROCESSING FOR CLOSING

- **154.** Enter completion into transaction management program
- **155.** Assist seller in questioning appraisal report if it seems too low
- 156. Get contract signed by all parties
- **157.** Coordinate closing process with buyer's agent and lender
- 158. Update closing forms and files
- **159.** Ensure all parties have all forms and information needed to close the sale
- **160.** Select location where closing will be held
- **161.** Confirm closing date and time, and notify all parties
- **162.** Assist in solving any title problems or in obtaining death certificates
- **163.** Work with buyer's agent in scheduling buyer's final walk-thru prior to closing
- **164.** Double check all tax, homeowners' association dues, utility, and applicable prorations
- 165. Request final closing figures from closing agent (attorney or title company)

- **166.** Receive and carefully review closing figures to ensure accuracy of preparation
- **167.** Confirm buyer and buyer's agent have received title insurance commitment
- **168.** Provide homeowners warranty for availability at closing
- **169.** Forward closing documents to absentee seller as requested
- **170.** Review documents with closing agent (attorney)
- **171.** Coordinate closing with seller's next purchase, and resolve any timing problems
- **172.** Have a *no-surprises* closing so seller receives a net-proceeds check at closing
- **173.** Refer sellers to one of the best agents at their destination, if applicable
- **174.** Change Local MLS Broker Marketplaces status to *Sold*. Enter sale date, price, selling broker, etc.



# FOLLOW-UP AFTER CLOSING



- 175. Share the warranty paperwork for claims in the future
- 176. Attempt to clarify and resolve any conflicts about repairs if buyer is not satisfied
- 177. Respond to any calls and provide any information required from office files
- **178.** If a rental, verify all deposits and prorated rents are reflected accurately on the closing statement
- 179. Close out listing in your management program







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