



**MREA: Buyer Specialist
Handout**

Forms & Checklists





Buyer Interview

Referral: Yes No Referral source: _____

Date: _____ Name: _____

Home phone: _____ Work phone: _____

Cell phone: _____ Pager: _____

Fax: _____ Email: _____

Best time to contact you: _____

Present address: _____

City/State: _____ Zip: _____

Own or Rent? _____ If you own, must you sell your home first? _____

Relocating? Yes No If so, where? _____

Currently working with an agent? Yes No If so, who? _____

Specific Needs/Wants:

Bedrooms: 1 2 3 4 5

Bathrooms: 1 2 3 4

Living Rooms: 1 2 3

Garage: 1 2 3

Levels: 1 2 3

Square ft.: _____

Pool: Yes No Spa: Yes No

Construction: brick stone frame block

Acreage: Yes No If so, size? _____

Central Air/Heat: Yes No

Specific features (fireplace, etc): _____

Specific additions/area: _____

Schools preferred: _____

Price range: _____

Payment Method: Mortgage Cash Other: _____

Do you need a lender? Yes No Name: _____

Phone: _____

Payment range: _____ Down payment: _____

How soon do you need to be in the home? _____

Buyer Consultation Appointment:

Date: _____

Time: _____



Referral Reward Form

Date	_____
Send a Referral Reward to	_____
Address	_____ _____
Phone	_____
Referral's Name	_____
Address	_____ _____
Phone	_____

Referral Information Form (page 2 of 2)

1. Sending Agent Procedures

1. Contact the chosen agent to see if he or she can provide the service in which you are interested. If you do not know an agent in that Market Center, it may be necessary to speak with the Team Leader to seek assistance in selecting a receiving agent. Be sure that the agent is completely familiar with the area the customer has indicated or where you have a potential listing.
2. Confirm the referral fee. The customary referral fee among agents in KELLER WILLIAMS® Realty is 20% of the side of the transaction. (20% of the gross listing or selling side of the commission.)
3. Complete your portion of the referral form and send two copies to the agent.
4. Give a copy of the referral form to your Team Leader.
5. Follow-up with the customer to make sure the agent has contacted him and is satisfied with the receiving agent.

2. Receiving Agent Procedures

1. Upon receiving the referral form, contact the customer.
2. Complete your portion of the referral form on each copy. Return one copy to the sending agent and retain one copy for your records. Be sure to include a copy of the contract pending file when a sale is consummated.
3. Give a copy to your Team Leader.

3. Completing the KELLER WILLIAMS® Realty Referral Information Form

SECTION 1 - RECEIVING OFFICE/SENDING OFFICE: This identifies the receiving/sending agents. This portion should be completed by the sending agent.

SECTION 2 - SELLER INFORMATION: This is used when sending out a listing referral. This portion should be completed by the sending agent.

SECTION 3 - BUYER INFORMATION: This contains data about the customer. It should be completed by the sending agent.

SECTION 4 - REALTOR'S ACCEPTANCE OF REFERRAL: This should be completed by the receiving agent and returned to the sending agent.



Exceeding Buyer Expectations Checklist

The *Exceeding Buyer Expectations Checklist* is designed to exceed all expectations of service any client might have.

Complete ?	When	What (examples)	Notes
<input type="checkbox"/>	Converting Buyer Leads	Hang <i>Welcome sign</i>	For buyer consultation
<input type="checkbox"/>	Converting Buyer Leads	Logo Velour Bag with Chocolates	For buyer consultation
<input type="checkbox"/>	Converting Buyer Leads	Logo Tote Bag with Buyer's Book	Given when buyer signs Buyer Representation Agreement
<input type="checkbox"/>	Servicing Buyers	Basket (fill with water, snacks, etc.)	Given before taking clients out on showings
<input type="checkbox"/>	Servicing Buyers	Logo Mug with Cookies	Delivered to the buyer's workplace when offer goes under contract
<input type="checkbox"/>	Coordinating Buyer Transaction & Closing	Movie Tickets	Given when all contingencies are removed
<input type="checkbox"/>	Coordinating Buyer Transaction & Closing	T-shirts and Vinyl Envelope	Brought to closing table
<input type="checkbox"/>	Completing Post-Closing	Lunch	Delivered to buyer on moving day

*Always include two of your business cards when delivering items to the buyer.



Sample Buyer Consultation Packet Checklist

(exact contents of the packet will be determined by the Mega Agent)

Client Name: _____ Property: _____

The *Buyer Consultation Packet* should contain the following:

Complete ?	Activity (forms)	Assigned To
<input type="checkbox"/>	Buyer Book (bound booklet with team name, contact information, and logo on cover) containing the following: <ul style="list-style-type: none"> ○ <i>Team Mission Statement</i> ○ <i>Introduction to the Team</i> ○ Testimonials ○ <i>Getting to Know Your Realtor</i> ○ <i>Buying vs. Renting</i> ○ <i>Buying a Home (FAQ)</i> ○ <i>Step by Step Process</i> (with space for Dates) ○ <i>Moving Checklist</i> ○ <i>Service Provider List</i> ○ <i>Notes on Viewed Properties</i> ○ Business Cards (minimum of 2) 	
<input type="checkbox"/>	<i>Homebuyer's 10's Sheet</i>	
<input type="checkbox"/>	<i>VIP Questionnaire</i>	
<input type="checkbox"/>	<i>Who Do You Call When...</i>	
<input type="checkbox"/>	<i>Buyer Representation Agreement</i> (state specific)	
<input type="checkbox"/>	<i>Addendum to Buyer Representation Agreement</i> (state specific)	
<input type="checkbox"/>	<i>Agency Disclosure</i> (state specific)	
<input type="checkbox"/>	<i>Affiliated Business Arrangement Disclosure</i>	
<input type="checkbox"/>	MLS Search Printout (printed from computer)	



Team Mission Statement

[Click Here and Type Your Contact Information](#)

∞ **Mission Statement** ∞

[Click Here and Type Mission Statement](#)

Example: I am a passionate and talented consultant dedicated to providing fiduciary real estate consulting and marketing services to my clients.

∞ **Vision Statement** ∞

[Click Here and Type Vision Statement](#)

Example: To be the Real Estate Consultant of choice.

∞ **Business Experience** ∞

Example:

- Keller Williams Realty 1998-Present
-
-

∞ **Professional Designations** ∞

-
-
-

∞ **Secondary Specialties** ∞

-
-

∞ **Family** ∞

-
-

∞ **Hobbies** ∞

-
-
-



Introduction to the Team

[Click **here** and type your team name - phone number]

Keller Williams Realty

[Click **here** and type your team website]

Team Resume

⌘ Professional Qualifications⌘

- [Click **here** and type Professional Qualifications]

⌘ Business Achievements⌘

- [Click **here** and type Business Achievements]

⌘ Professional Designations⌘

- [Click **here** and type Professional Designations]

⌘ Education⌘

- [Click **here** and type Education]



Getting to Know Your Realtor

If you're interviewing other Realtors, ask them these important twenty questions

1. Do you work as a full-time Realtor? ____ Yes ____ No
2. How long have you been selling real estate?
3. How many homes do you sell in a year?
4. Do you have a list of references that we may call?
5. How many full-time assistants do you have? Do you have a listings coordinator, a closing coordinator, a team coordinator?
6. What is your average time on the market compared to the Multiple Listing Service (MLS) average?
7. What is your average list to sell ratio compared to the MLS average?
8. Where do you rank in your office? Top Lister? Top Seller? For how many years?
9. Where do you rank in your company, franchise...locally, internationally? For how many years?
10. How many qualified buyers are you currently working with? Do you have enough buyer leads to require full-time buyer showing agents?
11. What lead generation system(s) do you have to develop an inventory of buyers for your listings? What are they? Who manages them?
12. How many listings do you currently have?
13. What is the market trend now?
14. How strong is your name recognition in the market area?
15. Do you have a written marketing plan specifically designed to selling my home?
16. Where and how often will you advertise our home? Would you provide us with professional full-color brochures of our home? Will you provide Internet advertising? How?
17. In what ways do you encourage other Realtors to sell my property?
18. If I give you the listing, what are the first seven things you will do to sell my property in the first week?
19. How will you let me know what you are doing to market my property?
20. Will you provide us with written activity reports of the showings and prospective buyer and Realtor comments?

If the Realtor you are interviewing falls short, can't substantiate, or hedges in any way, you're interviewing the wrong Realtor!

Make sure the Realtor can back up any and all statements. Take a "show me" attitude! Don't be shy; this could be *the most important business decision of your life.*



Buying vs. Renting

Although some renters believe that renting is “maintenance free”, they are actually paying for maintenance in their rent – whether they need it or not. Renting offers you no equity, no tax benefit, and no protection against regular rent increases. If your paying rent, your really just paying someone else’s mortgage. Writing a check is just like watching your hard earned money sail away. Let’s compare*.

Rent		vs.	Own	
Monthly Payment	\$1,000		Monthly Payment	\$855
Insurance	\$30		Taxes	\$260
Taxes	<u>\$0</u>		Insurance	\$50
			MIP Insurance	<u>\$45</u>
Total Payment	\$1,030		Total Payment	\$1,210
	<i>Savings</i>			
Interest Deduction	\$0		Interest Deduction	\$175
Tax Deduction	\$0		Tax Deduction	\$75
			After Tax	
Net Monthly Payment	\$1,030		Net Monthly Payment	\$960

* Approximate Payment/Cost Comparison based on estimated annual tax results. Based on 2.5 tax bracket and on estimated first year interest and taxes. Recommend consulting with tax expert. Payment based on FHA 30-year fixed rate loan with 7% interest rate, sales price of \$125,000 and a loan balance of \$121,250. Interest rate/rental rates, prices, terms, and availability subject to change without notice. See a qualified tax consultant for more details.



Buying a Home Frequently Asked Questions

? **How do I choose a mortgage lender?**

The [Click [here](#) and type your team name] can recommend several lenders who we have successfully worked with over the years. The lender will expedite all of the necessary paperwork and information, including ordering a credit report and appraisal of the property, if required.

The application normally takes about one hour. All parties who will be on the title as new owners should be present. The information you provide to the lender is confidential.

? **Do I need to bring anything with me when I am looking at homes?**

Bring a notebook and pen for note taking. Don't forget to bring along your *Buyer Book* as a reference guide when you are looking at homes. In the back of the book, we have included several sheets for the *Notes on Viewed Properties*. Feel free to use these to jot down key features of the houses we view. This will make it easier to remember the specifics about each home.

If you need to go back to a home for another look, just let us know, and we will happily schedule an appointment. And bring your checkbook so you can make an offer if we find a home you like.

? **When I start visiting homes, what should I be looking for the first time through?**

The house you ultimately choose to call home will play a major role in your life. While it is true that a home can be an excellent investment, it must also fit the way you live. Your chief concern should be those things that you cannot change: location, floor plan, # of baths, lot size, etc. Then, consider those things that you can change – appliances, carpet, paint, cabinets, etc. – and whether or not you are willing to change them.

? **What key questions should I ask about each home?**

Sellers will supply you with a Seller's Disclosure for the home, which will disclose any defects known by the seller. But, be sure to ask any questions you have about the home, even if you feel you are being nosy. You have a right to know. Ask any questions you have. We will assist you in finding the answers to all of your questions and/or concerns.

? **How many homes should I look at before I buy?**

We will be viewing homes that match the preferences you gave during the buyer consultation. As long as your preferences don't change, you will only to have see an average of 6-8 homes before finding the one you want.



? **Where can I get information about local schools?**

Ask us any questions you have about local schools. We stay as informed as possible about all of the local schools and can tell you where to find answers to any detailed questions you may have.

? **How can I find out what homes are selling for in a given neighborhood?**

Home sales are a matter of public record. You can call the Recorder's office, a local residential appraiser, or the public information department of the local Multiple Listing Service for information on recent sales history, average sales price, time on the market, and other listing information for sales in a given area. However, a better and easier way to get this information is to ask the [Click **here** and type your team name]. If you are interested in a particular home, we may be able to provide you with a list of comparables—sale prices of homes in the area that are roughly the same size and age as the home you are considering. This is a good way to evaluate the seller's asking price.

? **How do I determine the amount of my initial offer?**

Once you have examined the home's features and looked at the comparables, you should have a good idea of what the home's value is in the current market. Consider your financial situation, and make an offer that you consider to be fair. Your offer will include the amount you are willing to pay, financing terms, any personal property you wish to have included, loan commitment date, closing date, and other contingencies including inspections. Remember that the lower your offer is, the less likely the seller will be to accept, so avoid 'low-balling' if you really want the house.

? **Should I be present during the inspection?**

It is not required, but it is very much to your advantage. You will be able to better understand the inspection report, and know exactly which areas need attention. Plus, you will have a chance to get answers to many of your questions, and receive a lot of general information that will help you when you move into your new home.



Step-By-Step Process

A successful real estate transaction hinges on numerous details involving deadlines that must be met so that you can move into your ideal home as soon as possible.

TO DO:	DATE COMPLETED:
✓ Loan Application: (Application fee is due at this time).	_____
✓ Seller's Disclosure must be signed:	_____
✓ Set inspection date and time:	_____
✓ Written notice due – all items from the inspection that you wish to be repaired:	_____
✓ Negotiation of inspection repair items complete:	_____
✓ Title Commitment due:	_____
✓ Insurance: (You are required to arrange for insurance coverage and to inform your mortgage company of your agent's name and phone number).	_____
✓ Loan approval:	_____
✓ Closing Date:	_____

Please note: During the loan and home-buying process, you will be asked to supply documentation, respond to phone calls requesting information, schedule dates into your calendar, etc...



Moving Checklist

What to do Before you Move

Two months before moving

- Sort through your belongings to reduce the number of things to move.
- Have a garage sale or donate items you no longer need.
- Decide whether to move yourself or hire professionals. Make reservations with a moving company or truck rental company. Tip: Call three companies for estimates to compare.
- Gather packing supplies: boxes, packing material, tape, felt markers, and scissors.
- If you're moving a long distance, make travel arrangements with the airline, hotel, and rental car agency. If you're driving to your new home, get maps and plan your travel route.
- Save all moving receipts. Some moving expenses are tax deductible. Check the current tax code for requirements.
- Place your legal, medical, financial, and insurance records in a safe and accessible place.
- Purchase insurance coverage for valuables to be moved.
- _____
- _____
- _____

One month before moving

- Start packing items that aren't regularly used such as off-season clothes and decorations and items in storage areas (garage, attic, and closets).
- Make travel arrangements for your pets.
- If you're driving, get your car tuned up.
- Get medical records from your doctors, dentist, optometrist, and veterinarian.
- Send items (rugs, drapes, clothing, quilts, bedding) to the cleaners.
- Back up important computer files to floppy disk.
- _____
- _____
- _____

(Continued)



Moving Checklist (continued from previous page)

Two weeks before moving

- Contact your utility companies and notify them of your move.
- Sign up for services at your new address.
- Contact your long distance phone company and notify them of your move.
- Call friends and family and recruit help for the moving day.
- Confirm your travel reservations.
- Arrange to close or transfer your bank account, if appropriate. Pick up items you're your safety deposit box.
- _____
- _____
- _____

One week before moving

- Pick up items from the cleaners, repair shops, or friends.
- Pack a survival kit of clothes, medicines, special foods, etc. to carry you through the day while you unpack.
- Finish packing all boxes minus what you'll need in the final week.
- Inform the post office of your upcoming move.
- Send change-of-address cards with your new address and phone number to:*
- Friends and family
- Banks, insurance companies, credit card companies, and other financial institutions
- Magazines and newspapers
- Doctors, lawyers, accountants, realtors, and other service providers
- State and federal tax authorities and any other government agencies as needed
- Workplace, schools, and alma maters

The day before

- Set aside moving materials, such as tape measure, pocketknife, and rope.
- Pad corners and stairways of house.
- Lay down old sheets in the entry and hallways to protect floor coverings.
- Remove hanging fixtures.
- If you are moving yourself, pick up the rental truck and a dolly to move heavy boxes.
- If you are driving, check oil, tire pressure, and gas in your car.
- If you are flying, make sure you have tickets, charge cards and other essentials.
- _____
- _____
- _____

(Continued)



Moving Checklist (continued from previous page)

Moving Day

Carry with you:

- The keys to your new home.
- A map of your new town and directions to your home.
- The telephone number of the moving company.
- Cash or traveler's checks.
- Documentation related to the sale of your home.
- Your insurance policies and agent's phone number.
- Your current address book or personal planner.
- Prescription and non-prescription medicines.
- Enough clothing to get by if the movers are late.
- Any items of great personal value to you that are virtually irreplaceable.
- Back-up copies of important computer files.
- Sheets, towels and personal hygiene items for the first night in your new home.
- _____
- _____
- _____

Arrival Day

- Show movers where to place furniture and boxes.
- Check inventory to ensure that everything was delivered before signing delivery papers. Note any damages on the inventory sheet.
- Unpack any valuable items, such as silver, art, and jewelry, upon arrival.
- Inform the post office of your upcoming move.
- _____
- _____
- _____

(Continued)



Packing Checklist

Tips to make Your Move a Little Easier

Packing Tips

- Gather boxes in all sizes from friends, neighbors, and stores
- Collect cushioning material such as bubble wrap, Styrofoam pellets, furniture pads, old blankets, plastic bags, tissue paper, newspapers, and small towels to use as padding inside boxes.
- Create a “portable packing kit” with marking pens, a tape measure, packing tape, twine, and scissors. Carry it with you as you pack up items around your home.
- Reinforce the bottom of boxes with extra tape for added strength.
- Label each box with the name of the room in your home where it should be placed.
- Number the boxes and keep a list of which boxes goes in which room in your new home.
- Label boxes containing fragile items with large red lettering.
- Place china in plastic bags and stack plates upright on their sides, not flat.
- Pack your TV, stereo, and computer in their original boxes whenever possible.
- Keep boxes to 50 pounds or less.
- Pack heavy items into their own smaller boxes and place lighter items together into larger boxes. (Don’t pack all your books into one box!)
- Don’t move flammable, combustible, corrosive, or explosive items such as paint, gasoline, and ammunition.
- Pack a bag of personal items you’ll need during the move (change of clothes, toiletries, medicine, maps, food, and drinks). Keep it in an easy-to-find place when you pack.
- _____
- _____
- _____

(Continued)



Packing Checklist (continued from previous page)

PACKING LIST BY ROOM

Kitchen

- Cupboards
- Closets
- Drawers
- Box numbers for kitchen: _____

Dining Room

- China cabinet or hutch
- Light fixture and lamps
- Furniture: table and chairs
- Box numbers for dining room: _____

Living Room

- Bookcases and contents
- Entertainment center and contents: stereo, TV, CDs, videotapes, and so on
- Knickknacks and artwork
- Lamps
- Furniture: couch, chairs, and tables
- Box numbers for living room: _____

Family Room

- Bookcases and contents
- Entertainment center and contents: stereo, TV, CDs, videotapes, and so on
- Knickknacks and artwork
- Lamps
- Furniture: couch, chairs, and tables
- Box numbers for family room: _____

(Continued)



Packing Checklist (continued from previous page)

Master Bedroom

- Closets
- Dressers and contents
- Furniture: bed, dressers, night stands, and desk
- Box numbers for master bedroom: _____

Bedroom #1

- Closets
- Dressers and contents
- Furniture: bed, dressers, night stands, and desk
- Box numbers for bedroom #1: _____

Bedroom #2

- Closets
- Dressers and contents
- Furniture: bed, dressers, night stands, and desk
- Box numbers for bedroom #2: _____

Bedroom #3

- Closets
- Dressers and contents
- Furniture: bed, dressers, night stands, and desk
- Box numbers for bedroom #3: _____

(Continued)



Packing Checklist (continued from previous page)

Study/Office

- Computer equipment: CPU, monitor, and printer
- Desk and contents
- File cabinets and content
- Box numbers for study/office: _____

Bathroom

- Cupboards and contents
- Linens and towels
- Knickknacks and wall hangings
- Box numbers for bathroom: _____

Attic

- Trunks
- Boxes
- Box numbers for attic: _____

Garage

- Yard equipment and garden tools
- Home maintenance equipment and tools
- Box numbers for garage: _____

Basement

- Cupboards and shelves
- Box numbers for garage: _____



Service Provider List

Provided for your convenience

Following is a list of recommended Service Providers. These are vendors we have worked with in the past and that have been recommended to us by satisfied customers. These are only recommendations. These recommendations are made on an informational basis only and are offered as a convenience to you. We accept no responsibility.

UTILITIES:

ELECTRIC

Company Name Phone Number

WATER & SEWER

Company Name Phone Number

GAS

Company Name Phone Number

TRASH PICKUP

Company Name Phone Number

TELEPHONE

Company Name Phone Number

CABLE

Company Name Phone Number

AIR CONDITIONING:

Company Name Phone Number

APPLIANCE REPAIR:

Company Name Phone Number

APPRAISER - COUNTY:

Company Name Phone Number

CABINETRY:

Company Name Phone Number

CARPET/VINYL/TILE:

Company Name Phone Number

CARPET CLEANING:

Company Name Phone Number

CHIMNEY SWEEP:

Company Name Phone Number

CONTRACTORS:

Company Name Phone Number

ELECTRICIAN:

Company Name Phone Number

FLOORING:

Company Name Phone Number

FURNITURE REPAIR:

Company Name Phone Number

HANDYMAN SERVICES:

Company Name Phone Number

HAULING:

Company Name Phone Number

HOUSE CLEANING:

Company Name Phone Number

INTERIOR DECORATING:

Company Name Phone Number

INSURANCE:

Company Name Phone Number

LAWN & LANDSCAPE CARE:

Company Name Phone Number

LOCKSMITH:

Company Name Phone Number

MOVERS:

Company Name Phone Number

PAINTERS:

Company Name Phone Number

PLUMBERS:

Company Name Phone Number

POOL SERVICE:

Company Name Phone Number

PRESSURE CLEANING:

Company Name Phone Number

ROOFERS:

Company Name Phone Number

SCREENING:

Company Name Phone Number

SECURITY - HOME:

Company Name Phone Number

TERMITE/PEST COMPANIES:

Company Name Phone Number

TREE SERVICE:

Company Name Phone Number

WINDOW REPAIR:

Company Name Phone Number



Notes on Viewed Properties

Property Address: _____

PROPERTY	COMMENTS	EXTERIOR	COMMENTS
✓ View		✓ Foundation	
✓ Lot Size		✓ Roof	
✓ Landscaping		✓ Architectural Style	
✓ Square Footage		✓ Deck/Patio	
INTERIOR		COMMENTS	
✓ Number of Bedrooms		✓ Swimming Pool	
✓ Number of Bathrooms		✓ Garage	
✓ Living Room		✓ General Exterior Condition	
		LOCATION	COMMENTS
✓ Kitchen		✓ Convenience to Work	
✓ Dining Room		✓ Convenience to Shopping	
✓ Family Room		✓ Convenience to Schools	
✓ Study		✓ Convenience to Day Care	
✓ Fireplace(s)		✓ Nearby Recreational Facilities	
✓ Openness of Home		✓ General Appearance of Houses in the Area	
✓ General Interior Condition		✓ House Value Relative to the Area	
ADDITIONAL COMMENTS			



Homebuyer's 10's Sheet

Client Name:

Property:

The Transaction

1. On a scale of 1-10, with 1 being not so desirable and 10 being extremely desirable, what one thing has to happen in this transaction for your experience to be a 10?

2. What is important to you about that?

3. If we could add just one more thing, what other thing has to happen to make your experience a 10+?

4. What is important to you about that?

5. If we could add just one more thing for this experience to be a 10++, what would it be?

6. What is important to you about that?

The Home

7. What one thing does your home have to have/be for it to be a 10?

8. What is important to you about that?

9. Can you describe what that looks like?

10. If we could add just one more thing to make it a 10+, what would it be?

(continued on next page)



The Home (continued)

11. What is important to you about that?

12. Can you describe what that looks like?

13. If we could add just one more thing to make it a 10++, what would it be?

14. What is important to you about that?

15. Can you describe what that looks like?

Expectations

16. How does someone win with you?

17. How does someone lose with you?

18. What do you feel you have the right to expect from me as your Realtor?

19. What do you feel I have the right to expect from you as my client?



VIP Questionnaire

In order to better serve you, please complete and return this sheet with your listing paperwork. Thank you very much for the opportunity to serve you!

Your name: _____

Spouse/Significant Other's name: _____

Mailing address: _____

Physical address: _____

Phone numbers: _____

You Home: _____ Mobile: _____

Work: _____ Fax: _____

Spouse/SO Work: _____ Fax: _____

Email address: You: _____

Spouse/SO: _____

SPECIAL DATES	Month	Day	Gender	Name
Your birthday				
Spouse/SO birthday				
Child #1 birthday				
Child #2 birthday				
Child #3 birthday				
Child #4 birthday				
Wedding Anniversary				

FAVORITE THINGS	You	Spouse/Significant Other
Flower		
Color		
Restaurant		
Holiday		
Sport/Hobby		
Other		

Please list any friends or family members who may be in need of assistance at this time:

Your Team's Name
 Keller Williams Realty
 Address
 Telephone Number
 Website Address



Who Do You Call When . . .

Your home has been shown by a Realtor . . .

First call [click here](#) and insert main team telephone # anytime, day or night, to leave a message with your name and property address, followed by the name, company name, and phone # of the agent who showed your home. Then [click here](#) and type name and title of Listing Manager will contact the showing agent for feedback and pass along any comments to you!

You are going out of town . . .

Call [click here](#) and type name, title, and tel. # of Listing Manager.

When you are going out of town, leave a message at this number with information on how to reach you.

Your supply of brochures or data sheets is low . . .

[click here](#) and type name, title, and tel. # of Listing Manager

When you are running low on brochures or need data sheets, please leave a message on our Listing Manager's voice mail or the feedback hotline @ [click here](#) and type feedback telephone # or primary voice mail telephone # and we'll deliver to you as soon as possible.

You have questions once your home is under contract . . .

The Closing Department - [click here](#) and type name, title, and tel. # of Transaction Coordinator.

Please call us in reference to contract questions, inspection reports, addenda, closing information, etc.

When Will We Call You??

Communication is KEY! We will call you [click here](#) and type your calling schedule for the Seller.

You can reach our team leader [click here](#) and type team leader name anytime at [click here](#) and type team leader telephone #.

[[Click here](#) and type your name]

Keller Williams Realty

[[Click here](#) and type your website]



Affiliated Business Arrangement Disclosure Statement

Notice to: _____

Property Address: _____

Date: _____

Keller Williams Realty and its associates have a business relationship through a partial ownership interest in [affiliated business name] and may receive a financial benefit as a result of transactions with said company.

Set forth below is the estimated charge or range of charges by [affiliated business name] for the following settlement services:

Base Title Insurance Premium:	\$ _____
Settlement Services:	\$ [enter rate/fee]
(Credit \$60.00 with prior policy)	- \$ _____
	\$ _____

Your local representative will be most helpful in assisting you in determining which coverages are appropriate in your situation. You are not required to use [affiliated business name] as a condition for buying or selling this property. There are frequently other settlement service providers available with similar services. You are free to shop around to determine that you are receiving the best services and the best rate for these services.

I/We authorize Keller Williams Realty to order the necessary settlement services through [affiliated business name].

Seller

Seller

The cost involved for a purchaser is a \$100.00 closing fee. If the purchaser is obtaining financing for the purchase, the cost of issuing a loan title policy, which will be required by the lender, will be between [fee range], depending on the loan type, in addition to any endorsements required by the lender.

Buyer

Buyer



Seller Agent Questions Worksheet – Page 1

Agent Name: _____ Realty Company _____

Property Address _____

ABOUT THE PROPERTY

1. Is the property still available? Yes No (if not, thank the agent and end phone call)
2. Do you have any offers working? Yes No
3. Have there been previous offers that did not work? Yes No
4. Why didn't they work? _____
5. Is there anything not in the MLS or the disclosure of which I should be aware?

6. Have any major appliances or the roof been replaced recently?

7. Do you know the approximate ages? Check SPDS to avoid asking agent this question.

Appliances: _____

Roof: _____

Hot water heater: _____

HV/AC _____

8. Do you have septic/well certification? _____

Usually this must be done within <x> number of days of COE (lender/state requirement).

ABOUT THE SELLER

1. Why is the seller moving? _____

2. What is the time-frame for vacating the property? _____

3. Is there any flexibility in that? * _____

* Explain benefits to Seller. Ask if they will consider a quick close and then a leaseback from the new buyer at the buyer's PITI?

4. For how long? _____

ABOUT THE CONTRACT

1. Do you have the Seller's Disclosure? Would you fax it to me? _____

2. Are there any problems disclosed that you can explain?

3. Are the seller's offering a home warranty? _____

4. How many points or how much in closing costs is the Seller prepared to pay?

(continued on next page)



Seller Agent Questions Worksheet – Page 2

ABOUT THE CONTRACT (Continued)

5. Is there any flexibility in the price? _____

6. How can I reach you if I have an offer?

Cell: _____

Pager: _____

Home: _____

7. What is your office mailing address that should be noted on the contract?

OTHER COMMENTS

Date: _____ Telecom or interview between _____ & _____



Buyer Estimated Charges

Buyer's Name: _____ Selling Price: _____ Proposed Closing Date: _____	Property Address: _____ Proposed Loan Amount: _____ Prepared By: _____
Lender Fees: Loan Origination Fee \$ _____ Loan Discount \$ _____ Appraisal Fee \$ _____ Credit Report \$ _____ Application Fee \$ _____ Underwriting Fee \$ _____ Doc Prep Fee \$ _____ Tax Service Fee \$ _____ Flood Cert. Fee \$ _____ VA Funding Fe3e \$ _____ TOTAL LENDER FEES* \$ _____	Title Charges: Closing Fee \$ _____ Mortgage Title Ins. & Endorsements \$ _____ Courier Fee \$ _____
Items Required by Lender to be Paid in Advance: Interest ___ days @ \$___/day \$ _____ Mortgage Insurance Premium \$ _____ Hazard Insurance Premium \$ _____ Flood Insurance \$ _____	Government Recording & Transfer Charges: Recording Fees \$ _____ Doc Stamps – Mortgage \$ _____ Intangible Tax – Mortgage \$ _____
Reserves Deposited with Lender: Hazard Insurance (2 months) \$ _____ Mortgage Insurance (3 months) \$ _____ Property Taxes (3 months) \$ _____ Flood Insurance \$ _____ TOTAL PREPAIDS * \$ _____	Additional Charges: Keller Williams Processing Fee \$ _____ Survey \$ _____ Termite Inspection \$ _____ Home Inspection (paid at time of inspection) \$ _____ TOTAL CLOSING COSTS* \$ _____ DOWN PAYMENT \$ _____ GRAND TOTAL REQUIRED TO CLOSE (Total of All w/ * plus Down Payment) \$ _____
	Estimated Monthly Payments: Rate _____ Term _____ Principal and Interest \$ _____ Taxes \$ _____ Hazard/Flood Insurance \$ _____ Mortgage Insurance \$ _____ Estimate Monthly Mortgage Payment \$ _____ Maintenance Fees/Association Dues \$ _____

I/We understand that the above closing costs and figures are estimated only and that the final costs and all prorations will be determined by the lending institution chosen by the Buyer. I/We further understand that Keller Williams Realty and their associates in no way warrant or guarantee any of the above estimated figures.

I/We have reviewed and signed for the above estimated expenses before any contract for sale of real estate has been signed.

Buyer Signature	Date
Buyer Signature	Date



Contract Checklist

Agent: _____ Transaction: _____

Seller / Buyer

Representation: Our Client Buyer Seller

Res. Condo Resale New Construction

Property Address: _____ Sales Price: \$ _____
(# & street name) (city, state) (zip)

Closing Date: _____ Possession: _____ Lender: _____ Loan Application Made Yes No

SELLER
Name(s): _____
Moving Plans: _____

BUYER
Name(s): _____
Moving Plans: _____

DOCUMENTS TO BE INCLUDED:

- Signed and dated contract and addenda- Buyers, Sellers, and Agents
- Accepted offer returned to co-op agent
- Clients received copy of contract
- Disclosures (Radon, Lead Based Pain, HOA, etc.)
- Seller's Disclosure Statement (signed and dated)
- Clients received copy of Seller Disclosure.
- Agency Disclosure (signed and dated)
- Buyer Representation Agreement Listing Agreement
- Escrow check made payable to closing company specified in the contract or copy of escrow check (if already received by Closing Co.)
- Option Fee Check given to co-op agent Option Fee Deadline: _____ Copy of Option Fee Check
- Pre-Qualification/Pre-Approval letter
- Conditional Loan Approval Letter
- MLS Full Listing
- Is there an MLS translate with contract (if not our listing- for commission split information)
- Public Record
- Disclosure statement (if you have an affiliated business arrangement with either Closing Company or Lender)
- Contract Worksheet
- Parties of the Sale form
- Buyer Estimated Charges Seller's Estimated Closing Statement (Net Sheet)
- Title Insurance Policy
- Mortgage Information Request letter (Estoppel)

SPECIAL INSTRUCTIONS FOR TRANSACTION COORDINATOR:



Extra Copies of Forms & Checklists





Buyer Interview

Referral: Yes No Referral source: _____

Date: _____ Name: _____

Home phone: _____ Work phone: _____

Cell phone: _____ Pager: _____

Fax: _____ Email: _____

Best time to contact you: _____

Present address: _____

City/State: _____ Zip: _____

Own or Rent? _____ If you own, must you sell your home first? _____

Relocating? Yes No If so, where? _____

Currently working with an agent? Yes No If so, who? _____

Specific Needs/Wants:

Bedrooms: 1 2 3 4 5

Bathrooms: 1 2 3 4

Living Rooms: 1 2 3

Garage: 1 2 3

Levels: 1 2 3

Square ft.: _____

Pool: Yes No **Spa:** Yes No

Construction: brick stone frame block

Acreage: Yes No If so, size? _____

Central Air/Heat: Yes No

Specific features (fireplace, etc): _____

Specific additions/area: _____

Schools preferred: _____

Price range: _____

Payment Method: Mortgage Cash Other: _____

Do you need a lender? Yes No Name: _____

Phone: _____

Payment range: _____ Down payment: _____

How soon do you need to be in the home? _____

Buyer Consultation Appointment:

Date: _____

Time: _____



Buyer Appointment Checklist

Agent name: _____

Appt. date: _____

Time: _____

Name: _____

Consultation address (if not office):

Address: _____

City, State, & Zip: _____

Phone: _____

Price range: _____

Source: _____

Complete ?	Activity (forms)	Assigned To
<input type="checkbox"/>	Database Appointment	
<input type="checkbox"/>	<i>Begin Exceeding Buyer Expectations Checklist</i>	
<input type="checkbox"/>	<i>Buyer Consultation Packet Checklist</i>	
<input type="checkbox"/>	MLS Search Printout	
<input type="checkbox"/>	Driving Directions to Consultation address (if not office)	

Notes/Special Instructions:



Exceeding Buyer Expectations Checklist

The *Exceeding Buyer Expectations Checklist* is designed to exceed all expectations of service any client might have.

Complete ?	When	What (examples)	Notes
<input type="checkbox"/>	Converting Buyer Leads	Hang <i>Welcome sign</i>	For buyer consultation
<input type="checkbox"/>	Converting Buyer Leads	Logo Velour Bag with Chocolates	For buyer consultation
<input type="checkbox"/>	Converting Buyer Leads	Logo Tote Bag with Buyer's Book	Given when buyer signs Buyer Representation Agreement
<input type="checkbox"/>	Servicing Buyers	Basket (fill with water, snacks, etc.)	Given before taking clients out on showings
<input type="checkbox"/>	Servicing Buyers	Logo Mug with Cookies	Delivered to the buyer's workplace when offer goes under contract
<input type="checkbox"/>	Coordinating Buyer Transaction & Closing	Movie Tickets	Given when all contingencies are removed
<input type="checkbox"/>	Coordinating Buyer Transaction & Closing	T-shirts and Vinyl Envelope	Brought to closing table
<input type="checkbox"/>	Completing Post-Closing	Lunch	Delivered to buyer on moving day

*Always include two of your business cards when delivering items to the buyer.



Buyer Consultation Packet Checklist

Client Name: _____ Property: _____

The *Buyer Consultation Packet* should contain the following:

Complete ?	Activity (forms)	Assigned To
<input type="checkbox"/>	Buyer Book (bound booklet with team name, contact information, and logo on cover) containing the following: <ul style="list-style-type: none"> ○ <i>Team Mission Statement</i> ○ <i>Introduction to the Team</i> ○ Testimonials ○ <i>Getting to Know Your Realtor</i> ○ <i>Buying vs. Renting</i> ○ <i>Buying a Home (FAQ)</i> ○ <i>Step by Step Process</i> (with space for Dates) ○ <i>Moving Checklist</i> ○ <i>Service Provider List</i> ○ <i>Notes on Viewed Properties</i> ○ Business Cards (minimum of 2) 	
<input type="checkbox"/>	<i>Homebuyer's 10's Sheet</i>	
<input type="checkbox"/>	<i>VIP Questionnaire</i>	
<input type="checkbox"/>	<i>Who Do You Call When...</i>	
<input type="checkbox"/>	<i>Buyer Representation Agreement</i> (state specific)	
<input type="checkbox"/>	<i>Addendum to Buyer Representation Agreement</i> (state specific)	
<input type="checkbox"/>	<i>Agency Disclosure</i> (state specific)	
<input type="checkbox"/>	<i>Affiliated Business Arrangement Disclosure</i>	
<input type="checkbox"/>	MLS Search Printout (printed from computer)	



Homebuyer's 10's Sheet

Client Name:

Property:

The Transaction

1. On a scale of 1-10, with 1 being not so desirable and 10 being extremely desirable, what one thing has to happen in this transaction for your experience to be a 10?

2. What is important to you about that?

3. If we could add just one more thing, what other thing has to happen to make your experience a 10+?

4. What is important to you about that?

5. If we could add just one more thing for this experience to be a 10++, what would it be?

6. What is important to you about that?

The Home

7. What one thing does your home have to have/be for it to be a 10?

8. What is important to you about that?

9. Can you describe what that looks like?

10. If we could add just one more thing to make it a 10+, what would it be?

(continued on next page)

The Home (continued)

11. What is important to you about that?

12. Can you describe what that looks like?

13. If we could add just one more thing to make it a 10++, what would it be?

14. What is important to you about that?

15. Can you describe what that looks like?

Expectations

16. How does someone win with you?

17. How does someone lose with you?

18. What do you feel you have the right to expect from me as your Realtor?

19. What do you feel I have the right to expect from you as my client?



VIP Questionnaire

In order to better serve you, please complete and return this sheet with your listing paperwork. Thank you very much for the opportunity to serve you!

Your name: _____

Spouse/Significant Other's name: _____

Mailing address: _____

Physical address: _____

Phone numbers: _____

You Home: _____ Mobile: _____

Work: _____ Fax: _____

Spouse/SO Work: _____ Fax: _____

Email address: You: _____

Spouse/SO: _____

SPECIAL DATES	Month	Day	Gender	Name
Your birthday				
Spouse/SO birthday				
Child #1 birthday				
Child #2 birthday				
Child #3 birthday				
Child #4 birthday				
Wedding Anniversary				

FAVORITE THINGS	You	Spouse/Significant Other
Flower		
Color		
Restaurant		
Holiday		
Sport/Hobby		
Other		

Please list any friends or family members who may be in need of assistance at this time:

Your Team's Name
 Keller Williams Realty
 Address
 Telephone Number
 Website Address



Affiliated Business Arrangement Disclosure Statement

Notice to: _____

Property Address: _____

Date: _____

Keller Williams Realty and its associates have a business relationship through a partial ownership interest in [affiliated business name] and may receive a financial benefit as a result of transactions with said company.

Set forth below is the estimated charge or range of charges by [affiliated business name] for the following settlement services:

Base Title Insurance Premium:	\$ _____
Settlement Services:	\$ [enter rate/fee]
(Credit \$60.00 with prior policy)	- \$ _____
	\$ _____

Your local representative will be most helpful in assisting you in determining which coverages are appropriate in your situation. You are not required to use [affiliated business name] as a condition for buying or selling this property. There are frequently other settlement service providers available with similar services. You are free to shop around to determine that you are receiving the best services and the best rate for these services.

I/We authorize Keller Williams Realty to order the necessary settlement services through [affiliated business name].

Seller

Seller

The cost involved for a purchaser is a \$100.00 closing fee. If the purchaser is obtaining financing for the purchase, the cost of issuing a loan title policy, which will be required by the lender, will be between [fee range], depending on the loan type, in addition to any endorsements required by the lender.

Buyer

Buyer

Seller Agent Questions Worksheet – Page 1

Agent Name: _____ Realty Company _____

Property Address _____

ABOUT THE PROPERTY

1. Is the property still available? Yes No (if not, thank the agent and end phone call)
2. Do you have any offers working? Yes No
3. Have there been previous offers that did not work? Yes No
4. Why didn't they work? _____
5. Is there anything not in the MLS or the disclosure of which I should be aware?

6. Have any major appliances or the roof been replaced recently?

7. Do you know the approximate ages? Check SPDS to avoid asking agent this question.

Appliances: _____

Roof: _____

Hot water heater: _____

HV/AC _____

8. Do you have septic/well certification? _____

Usually this must be done within <x> number of days of COE (lender/state requirement).

ABOUT THE SELLER

1. Why is the seller moving? _____
2. What is the time-frame for vacating the property? _____
3. Is there any flexibility in that? * _____

* Explain benefits to Seller. Ask if they will consider a quick close and then a leaseback from the new buyer at the buyer's PITI?

4. For how long? _____

ABOUT THE CONTRACT

1. Do you have the Seller's Disclosure? Would you fax it to me? _____
2. Are there any problems disclosed that you can explain?

3. Are the seller's offering a home warranty? _____

4. How many points or how much in closing costs is the Seller prepared to pay?

(continued on next page)

Seller Agent Questions Worksheet – Page 2

ABOUT THE CONTRACT (Continued)

5. Is there any flexibility in the price? _____

6. How can I reach you if I have an offer?

Cell: _____

Pager: _____

Home: _____

7. What is your office mailing address that should be noted on the contract?

OTHER COMMENTS

Date: _____ Telecom or interview between _____ & _____



Buyer Estimated Charges

Buyer's Name: _____ Selling Price: _____ Proposed Closing Date: _____	Property Address: _____ Proposed Loan Amount: _____ Prepared By: _____
Lender Fees: Loan Origination Fee \$ _____ Loan Discount \$ _____ Appraisal Fee \$ _____ Credit Report \$ _____ Application Fee \$ _____ Underwriting Fee \$ _____ Doc Prep Fee \$ _____ Tax Service Fee \$ _____ Flood Cert. Fee \$ _____ VA Funding Fe3e \$ _____ TOTAL LENDER FEES* \$ _____	Title Charges: Closing Fee \$ _____ Mortgage Title Ins. & Endorsements \$ _____ Courier Fee \$ _____
Items Required by Lender to be Paid in Advance: Interest ___ days @ \$___/day \$ _____ Mortgage Insurance Premium \$ _____ Hazard Insurance Premium \$ _____ Flood Insurance \$ _____	Government Recording & Transfer Charges: Recording Fees \$ _____ Doc Stamps – Mortgage \$ _____ Intangible Tax – Mortgage \$ _____
Reserves Deposited with Lender: Hazard Insurance (2 months) \$ _____ Mortgage Insurance (3 months) \$ _____ Property Taxes (3 months) \$ _____ Flood Insurance \$ _____ TOTAL PREPAIDS * \$ _____	Additional Charges: Keller Williams Processing Fee \$ _____ Survey \$ _____ Termite Inspection \$ _____ Home Inspection (paid at time of inspection) \$ _____ TOTAL CLOSING COSTS* \$ _____ DOWN PAYMENT \$ _____ GRAND TOTAL REQUIRED TO CLOSE (Total of All w/ * plus Down Payment) \$ _____
	Estimated Monthly Payments: Rate _____ Term _____ Principal and Interest \$ _____ Taxes \$ _____ Hazard/Flood Insurance \$ _____ Mortgage Insurance \$ _____ Estimate Monthly Mortgage Payment \$ _____ Maintenance Fees/Association Dues \$ _____

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I/We have reviewed and signed for the above estimated expenses before any contract for sale of real estate has been signed.

Buyer Signature

Date

Buyer Signature

Date



Contract Checklist

Agent: _____ Transaction: _____

Seller / Buyer

Representation: Our Client Buyer Seller

Res. Condo Resale New Construction

Property Address: _____ Sales Price: \$ _____
(# & street name) (city, state) (zip)

Closing Date: _____ Possession: _____ Lender: _____ Loan Application Made Yes No

SELLER
Name(s): _____
Moving Plans: _____

BUYER
Name(s): _____
Moving Plans: _____

DOCUMENTS TO BE INCLUDED:

- Signed and dated contract and addenda- Buyers, Sellers, and Agents
- Accepted offer returned to co-op agent
- Clients received copy of contract
- Disclosures (Radon, Lead Based Pain, HOA, etc.)
- Seller's Disclosure Statement (signed and dated)
- Clients received copy of Seller Disclosure.
- Agency Disclosure (signed and dated)
- Buyer Representation Agreement Listing Agreement
- Escrow check made payable to closing company specified in the contract or copy of escrow check (if already received by Closing Co.)
- Option Fee Check given to co-op agent Option Fee Deadline: _____ Copy of Option Fee Check
- Pre-Qualification/Pre-Approval letter
- Conditional Loan Approval Letter
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- Is there an MLS translate with contract (if not our listing- for commission split information)
- Public Record
- Disclosure statement (if you have an affiliated business arrangement with either Closing Company or Lender)
- Contract Worksheet
- Parties of the Sale form
- Buyer Estimated Charges Seller's Estimated Closing Statement (Net Sheet)
- Title Insurance Policy
- Mortgage Information Request letter (Estoppel)

SPECIAL INSTRUCTIONS FOR TRANSACTION COORDINATOR: