

- a.** Follow up in various communication methods until initial contact is made
- b.** Have initial phone call, zoom meeting or in person meeting
- c.** Do full intake on where, when, what and how? How being whether cash or mortgage. Ask if pre-approved and get a copy of it.
- d.** Have the buyer sign Agency Disclosure, Fair Housing Disclosure and Buyer broker Compensation Agreement.
- e.** If they will not sign a Buyer Broker Agreement, you cannot show them property; Can use either exclusive agreement which is for any property they buy during agreement period or non-exclusive which is for one specific property
- f.** Create contact and opportunity in command and make sure documents are in the opportunity
- g.** Search for properties – Send choices to buyer – send limited choices and ask for feedback or if they want to see any of them. Add them to Auto search if they prefer (you do not get to monitor what is sent). Check inventory daily beyond requested neighborhood if other criteria is met. Send them your APP; they need to create account and then you can see what they are looking at or they can share their search with you.
- h.** Show property and get feedback to help narrow the search
- i.** Submit Offer – Make sure your terms are clear with respect to financing, inspection, buyer agent compensation and any other pertinent terms. Negotiate on behalf of client until an offer is accepted- Provide listing agent with all buyer side information for the deal sheet
- j.** Attend inspection with the buyer – Do not touch any mechanicals; turn on water or appliances; only inspector should do this; Send any issues in writing to listing agent; Renegotiate if problems are found in inspection
- k.** Get a copy of the deal sheet from listing agent; check for accuracy
- l.** Communicate with the client, bank and the listing agent to obtain progress and keep track of deal; Send KW commission invoice to both attorneys; make it clear who is paying the commission.
- m.** Do final walkthrough as close to the day and time of closing as possible – Check all systems and appliances – Check for anything Seller was required to repair prior to closing
- n.** CLOSING!!!!
- o.** Stay in touch with buyer and ask for referrals