#10 Home Buying Email Template – New Client

Dear <insert name>,

I look forward to helping you find your next place to call home. Please know I am here every step of the way if there are any questions or concerns that may arise. Please take a few minutes to save my phone number and my email for future communication. To get started, I would like to get you set up to start window shopping online. Please let me know what you are looking for below:

Bedrooms:

Bathrooms:

Price range:

Area(s):

Do you have home age, condition, or size requirements?

How soon would you like to be in your next home?

Do you have a home to sell before buying?

Do you have a lease? If so, when is it up?

Would you like house listings sent to another email address?

What is your current mailing address?

What is the best way to contact you (email, text, call)?

Are you currently working with a lender, or would you like one to contact you?

If there is anything else that is a MUST? As we work together, I will learn what you like and don’t like.

I look forward to working with you, and I hope to hear from you soon! If you would like to come into the office and do a walk-through of the buying process, please let me know when you have about 30 minutes to spare.

Sincerely,

<insert your signature block>

*Make sure to include your email and phone number.*

#9 Buyer Information Needed to Write an Offer

|  |  |
| --- | --- |
| MLS#  |  |
| NAME: |  |
| ADDRESS: |  |
| CITY/ST/ZIP: |  |
| PHONE: |  |
| EMAIL(S): |  |
| OFFER PRICE: |  |
| LOAN ($$ OR % DOWN): |  |
| EARNEST AMOUNT: |  |
| OFFER EXPIRATION (DATE & TIME): |  |
| CONTINGENCIES: |  |
|  |  |
|  |  |
| CLOSING COSTS: |  |
| CLOSE DATE: |  |
| HOME WARRANTY: Y / N WHO PAYS: |  |
| HOA PAYMENT: |  |
| LENDER/PREQUAL: |  |
| **ADDITIONAL ITEMS:** |  |
| Mineral Rights? Y / N | Lease back? |
| Non-realty items to include/exclude | Lead-based paint disclosure |
| Seller’s Disclosure | HOA Bylaws |
| Possession |  |

#8 Seller Listing Timeline – Tasks to Complete

|  |  |  |  |
| --- | --- | --- | --- |
| Listing address:  |  |  |  |
| Primary contact name: |  | Phone number: |   |
| Picture appointment: |  | Seller home? Y / N | Use lockbox? Y / N |
| Date to place *active*: |  |  |  |
| Order yard sign: |  |  |  |
| Key for lockbox: |  |  |  |
| Install yard sign riders, info box, etc.: |  |  |  |
| Create property flyer: |  |  |  |
| Send “Just Listed” postcards: |  |  |  |
| Seller’s disclosures completed / received: |  |  |   |
| Seller homework: |  |  |  |
|  |  |  |  |
| Price Review Date: |  |  |  |
| Open house 1: |  |  |  |
| Open house 2: |  |  |  |
| Private remarks for MLS: |  |  |  |
|  |  |  |  |
|  |  |  |  |
| NOTES: |  |  |  |

#7 Open Title Form

Owner #1 Name (First, Middle, Last, Legal): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Last 4 digits of SSN: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Daytime Phone:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Cell: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Owner #2 Name (First, Middle, Last, Legal): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Last 4 digits of SSN: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Daytime Phone:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Cell: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Seller provide existing survey? Y / N Any changes/improvements since survey was completed? Y / N

Current marital status: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Any Pending changes to status? Y / N

Since purchasing the property have there been any of the following (circle all that apply):

 Divorce Marriage Death Bankruptcy Foreclosure Notice

Current mortgage company: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Loan # \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Customer service phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Mortgage current? Y / N

Current tax or exemptions (Homestead, Over 65, etc.): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Homeowner’s Association information**

My property **IS** or **IS NOT** in a Homeowner’s Association (HOA) (please circle one)

If yes, the HOA is **MANDATORY** or **VOLUNTARY** (circle one)

If yes, the HOA dues are $\_\_\_\_\_\_\_\_\_\_\_\_ per \_\_\_\_\_\_\_\_\_\_\_\_ (month, quarter, year)

HOA company name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

HOA contact name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ HOA contact phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

HOA contact email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Authorization To Release Information**

You are hereby authorized to release all the above information to the appropriate title company and their assigns including all information relating to the payoff of the referenced loan. A photocopy of this authorization may be used as the equivalent of the original.

Seller signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

#6 Seller’s Exclusion List

Unless otherwise specified, everything permanently attached to the property is included in the sale. Please check any of the following items that will be *exclusions* from the sale of your property. It is best if you are specific, so add qualifying information as needed.

* Curtains and rods, draperies and rods, valances, blinds, window shades
* Towel racks, bathroom mirrors
* Window screens, shutters, awnings, mailboxes
* Area rugs
* Decorative mirrors, decorative hardware
* Ceiling fans, attic fan
* TV antennae, satellite dish, built-in speakers, solar panels
* Light fixtures, plumbing fixtures, water softener system
* Built-in kitchen equipment, including coffee pot, toaster, toaster oven, microwave, pot racks
* Ring doorbells, garage door openers, controllers
* Central vacuum and accessories
* All swimming pool equipment, portable spa
* Shrubbery, plants, decorative rocks or boulders
* Security cameras, security systems, safes
* Permanently installed outdoor cooking equipment
* Fireplace screens or doors, gas logs, rocks, irons
* Swing set, playground equipment, basketball hoop, backboard
* Fountains, birdbaths, statues, outdoor lighting
* Bookshelves attached or appearing to be attached
* Workbench, shelves in garage or storage area
* Other permanently attached items
	+ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
	+ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
	+ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
	+ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
	+ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

If you are not sure if an item is considered to be permanently attached, please ask me. Correctly identifying what will stay with the property and what is excluded from the sale will make the transaction much smoother.

Seller’s Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

#5 Seller Homeowner Package

**What we need to get started:**

* Seller’s Exclusion List
* Residential Input Form
* House Measurement Form
* Open Title Form
* Utility Bill Form
* Extra Information Form
* Completed Seller’s Disclosure Notice Form
* Lead-Based Paint Disclosure Form
* Alarm System Information (if applicable)

\_\_\_Leased \_\_\_Owned \_\_\_Pad

Location:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

* Key to home, outbuildings, other locked areas (for lockbox)
	+ Please make sure you have a copy for yourself
* Floor plan or blueprints you may have
* Copies of all home inspections, reports, recent repairs
* Copy of survey
* Location of underground sprinklers or invisible pet fencing (for yard sign installation)

**Please gather:**

* Extra keys from neighbors, family, and friends
* HOA Bylaws
* Appliance and mechanical manuals, warranties, extra parts, service numbers/business cards
	+ Furnace
	+ Water heater
	+ Kitchen appliances
	+ Electronic thermostats
	+ Water softener
	+ Washer/Dryer
	+ Underground sprinkler system
	+ Invisible pet fencing

#4 Seller Extra Information

1. What drew you to this house or location and caused you to buy?
2. What do you love about your home?
3. What will you miss the most about your home?
4. What are your home’s best features?
5. What do you like best about the community?

Please make a list of anything you would like to take with you upon move-out (other than personal items). Examples include special window coverings, light fixtures, fireplace equipment, alarm systems, etc. We will make sure to list these as excluded items from the sale.

#3 Measurement Form

Living 1 \_\_\_\_\_\_\_\_ x \_\_\_\_\_\_\_\_ Level:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Upper, Entry, Lower)

Living 2 \_\_\_\_\_\_\_\_ x \_\_\_\_\_\_\_\_ Level:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Upper, Entry, Lower)

Living 3 \_\_\_\_\_\_\_\_ x \_\_\_\_\_\_\_\_ Level:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Upper, Entry, Lower)

Dining \_\_\_\_\_\_\_\_ x \_\_\_\_\_\_\_\_ Level:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Upper, Entry, Lower)

Breakfast \_\_\_\_\_\_\_\_ x \_\_\_\_\_\_\_\_ Level:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Upper, Entry, Lower)

Kitchen \_\_\_\_\_\_\_\_ x \_\_\_\_\_\_\_\_ Level:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Upper, Entry, Lower)

Main Bedroom \_\_\_\_\_\_\_\_ x \_\_\_\_\_\_\_\_ Level:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Upper, Entry, Lower)

Bedroom 2 \_\_\_\_\_\_\_\_ x \_\_\_\_\_\_\_\_ Level:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Upper, Entry, Lower)

Bedroom 3 \_\_\_\_\_\_\_\_ x \_\_\_\_\_\_\_\_ Level:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Upper, Entry, Lower)

Bedroom 4 \_\_\_\_\_\_\_\_ x \_\_\_\_\_\_\_\_ Level:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Upper, Entry, Lower)

Bedroom 5 \_\_\_\_\_\_\_\_ x \_\_\_\_\_\_\_\_ Level:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Upper, Entry, Lower)

Bedroom 6 \_\_\_\_\_\_\_\_ x \_\_\_\_\_\_\_\_ Level:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Upper, Entry, Lower)

Home Office \_\_\_\_\_\_\_\_ x \_\_\_\_\_\_\_\_ Level:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Upper, Entry, Lower)

Utility \_\_\_\_\_\_\_\_ x \_\_\_\_\_\_\_\_ Level:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Upper, Entry, Lower)

Laundry \_\_\_\_\_\_\_\_ x \_\_\_\_\_\_\_\_ Level:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Upper, Entry, Lower)

Other \_\_\_\_\_\_\_\_ x \_\_\_\_\_\_\_\_ Level:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Upper, Entry, Lower)

Other \_\_\_\_\_\_\_\_ x \_\_\_\_\_\_\_\_ Level:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Upper, Entry, Lower)

Other \_\_\_\_\_\_\_\_ x \_\_\_\_\_\_\_\_ Level:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Upper, Entry, Lower)

Other \_\_\_\_\_\_\_\_ x \_\_\_\_\_\_\_\_ Level:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Upper, Entry, Lower)

Other \_\_\_\_\_\_\_\_ x \_\_\_\_\_\_\_\_ Level:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Upper, Entry, Lower)

Other \_\_\_\_\_\_\_\_ x \_\_\_\_\_\_\_\_ Level:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Upper, Entry, Lower)

#2 Pre-Closing Checklist: Sellers

**Immediately upon acceptance of the contract:**

* Follow-up on any terms outlined in the contract (HOA paperwork, clearance letters, etc.)
* Make any repairs included in the contract
* Provide me with the current mortgage loan(s) information and equity line of credit. Documents should include your account numbers, contact information for the lenders, and your personal information.

**During the home Inspection:**

* You do not need to be onsite. I will be there as your representative.
* If possible, plan on being accessible by phone to answer any questions.
* Please provide me with keys to any areas (crawlspaces, attics, outbuildings, etc.) that the inspector will need to access.
* If the property is currently vacant, ensure that all utilities are on before the inspection.

**1-2 weeks following the acceptance date of the contract:**

* Review any inspection amendment from the buyer with me and begin making agreed repairs.
* Provide me with your preferred closing date/time (please provide at least two dates/times).
* Reserve your moving truck or schedule your moving service.
* If contractually obligated to provide a termite clearance letter, call the company that provided the initial letter when you listed your property. You must obtain your letter no more than 30 days before closing.

**2 weeks before closing date:**

* Obtain a change of address package from the post office.
* Begin notifying family, friends, debtors, etc., of your address change.
* Begin collecting information to pass on to the new owner (receipts for appliances, warranty information, owner’s manuals, repair and contractor contact information, and dates of service).

**1 week before closing:**

* Call your utility companies to schedule the final readings and the transfer date of service to the new owner.
* Get directions to the closing location from me.
* Collect receipts and information about the work done to satisfy the inspection amendment and give copies to me.

**Day before closing:**

* Review the HUD 1 Settlement Agreement to verify that the terms of the contract are correct. Pay special attention to the line items for water bills, HOA dues, and mortgage balances.
* If you have any concerns, please contact me immediately.
* If there are any potential disputes, I will advise you to bring proof of payment to the closing.

**Day of closing:**

* Bring a photo ID and any documents requested by the closing attorney or title agent.
* Bring your checkbook just in case a small item needs to be handled on the spot (this is usually unnecessary, but it is always nice to have that option).
* Bring updated termite clearance letter if required by contract.
* Give the new owner your forwarding address and phone number in case anything is mistakenly sent to you at the old address.

**Post-closing:**

* Take the Transfer Affidavit to the City, Township, or Village to transfer the property out of your name.
* Take the Homestead Recission form to the City, Township, or Village to remove the homestead discount.

#1 Children’s Listing Agreement (Seller)

I understand that my parents have asked a Sales Associate from <insert your company name> to sell our house.

I know that our Sales Associate will work hard to find a new owner for our house who will love it as much as we do.

I want to help! I promise to assist my family and our Sales Associate and commit to doing the following things:

* Make my bed every morning.
* Pick up all my toys and put them away neatly every day.
* Turn on lights when people come to see our house.
* Help my parents keep our house neat and tidy.
* Smile, but be quiet when people come inside of our house.

I understand that if my parents affirm that I abided by this agreement, I will receive a <insert gift>. Example: I will receive a $25 gift certificate from the store of my choice.

My gift preference is: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

My name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 (Print Name)

My signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date \_\_\_\_\_\_\_\_\_\_\_

Sales associate signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date \_\_\_\_\_\_\_\_\_\_\_