

### Pre-Listing Activities

1. Make an appointment with the seller for a listing presentation.
2. Send a written or e-mail confirmation of appointment and call to confirm.
3. Review appointment questions.
4. Research all comparable currently listed properties.
5. Research sales activity for the past 18 months from MLS and public databases.
6. Research "average days on market" for properties similar in type, price and location.
7. Download and review property tax roll information.
8. Prepare "comparable market analysis" (CMA) to establish market value.
9. Obtain a copy of subdivision plat/complex layout.
10. Research property's ownership and deed type.
11. Research property's public record information for lot size and dimensions.
12. 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 a listing presentation package with above materials.
17. Perform exterior "curb appeal assessment" of subject property.
18. Compile and assemble formal files on property.
19. Confirm current public schools and explain their impact on market value.
20. Review listing appointment checklist to ensure completion of all tasks.

### Listing Appointment Presentation

21. Give sellers an overview of current market conditions and projections.
22. Review agent and company credentials and accomplishments.
23. Present company's profile and position or "niche" in the marketplace.
24. Present CMA results, including comparables, solds, current listings and expirations.
25. Offer professional pricing strategy based on interpretation of current market conditions.
26. Discuss goals to market effectively.
27. Explain market power and benefits of multiple listing services.
28. Explain market power of Web marketing, IDX and REALTOR.com.
29. Explain the work the broker and agent do "behind the scenes" and agent's availability on weekends.
30. Explain agent's role in screening qualified buyers to protect against curiosity seekers.
31. Present and discuss a strategic master marketing plan.
32. Explain different agency relationships and determine seller's preference.
33. Review all clauses in the listing contract and obtain the seller's signature.

### After Listing Agreement is Signed

34. Review current title information.
35. Measure overall and heated square footage.
36. Measure interior room sizes.
37. Confirm lot size via owner's copy of certified survey, if available.
38. Note any and all unrecorded property lines, agreements, easements.
39. Obtain house plans, if applicable and available.
40. Review house plans, make copies.

41. Order plat map for retention in property's listing file.
  42. Prepare showing instructions for buyers' agents and agree on showing time with the seller.
  43. Obtain current mortgage loan(s) information: companies and account numbers.
  44. Verify current loan information with lender(s).
  45. Check if loans (s) can be assumed and any special requirements.
  46. Discuss possible buyer financing alternatives and options with the seller.
  47. Review current appraisal if available.
  48. Identifying the HomeOwner Association manager is applicable.
  49. Verify HomeOwner Association fees with manager—mandatory or optional and current annual fee.
  50. Order copy of HomeOwner Association bylaws, if applicable.
  51. Research electricity availability and supplier's name and phone number.
  52. Calculate average utility usage from the last 12 months of bills.
  53. Research and verify city sewer/septic tank systems.
  54. Calculate average water system fees or rates from the last 12 months of bills.
  55. Or confirm well status, depth and output from Well Report.
  56. Research/verify natural gas availability, supplier's name and phone number.
  57. Verify security system, term of service and whether owned or leased.
  58. Verify if the seller has a transferable Termite Bond.
  59. Ascertain need for lead-based paint disclosure.
  60. Prepare a detailed list of property amenities and assess market impact.
  61. Prepare a detailed list of property's "Inclusions & Conveyances With Sale."
  62. Complete list of completed repairs and maintenance items.
  63. Send a "Vacancy Checklist" to the seller if property is vacant.
  64. Explain benefits of Home Owner Warranty to sellers.
  65. Assist sellers with completion and submission of Home Owner Warranty application.
  66. When received, place Homeowner Warranty in property file for conveyance at time of sale.
  67. Have an extra key made for the lockbox.
  68. Verify if property has rental units involved. And if so:
  69. Make copies of all leases for retention in the listing file.
  70. Verify all rents and deposits.
  71. Inform tenants of listing and discuss how showings will be handled.
  72. Arrange for yard sign installation.
  73. Assist seller with completion of Seller's Disclosure form.
  74. Complete "new listing checklist."
  75. Review results of Curb Appeal Assessment with seller and suggest improvements for salability.
  76. Review results of Interior Decor Assessment and suggest changes to shorten time on market.
  77. Load listing time into transaction management software.
- Entering Property in MLS Database
78. Prepare MLS Profile Sheet—agent is responsible for "quality control" and accuracy of listing data.
  79. Enter property data from Profile Sheet into MLS listing database.

80. Proofread MLS database listing for accuracy, including property placement in mapping function.

81. Add property to company's Active Listings.

82. Provide sellers with signed copies of Listing Agreement and MLS Profile Data Form w/i 48 hrs.

83. Take more photos for upload into MLS and for use on flyers. Discuss efficacy of panoramics.  
Marketing the Listing

84. Create print and Internet ads with seller's input.

85. Coordinate showings with owners, tenants and other agents. Return all calls—weekends included.

86. Install electronic lockbox. Program with agreed-upon showing time windows.

87. Prepare mailing and contact list.

88. Generate mail-merge letters to contact list.

89. Order "Just Listed" labels and reports.

90. Prepare flyers and feedback forms.

91. Review comparable MLS listings regularly to ensure property remains competitive in price, terms, conditions and availability.

92. Prepare property marketing brochure for seller's review.

93. Arrange for printing or copying of supply of marketing brochures or flyers.

94. Place marketing brochures in all company agent mailboxes.

95. Upload listing to company and agent Internet sites, if applicable.

96. Mail "Just Listed" notice to all neighborhood residents.

97. Advise Network Referral Program of listing.

98. Provide marketing data to buyers from international relocation networks.

99. Provide marketing data to buyers coming from referral networks.

100. Provide "Special Feature" cards for marketing, if applicable.

101. Submit ads to company's participating Internet real estate sites.

102. Convey price changes promptly to all Internet groups.

103. Reprint/supply brochures promptly as needed.

104. Review and update loan information in MLS as required.

105. Send feedback e-mails/faxes to buyers' agents after showings.

106. Review weekly Market Study.

107. Discuss feedback from showing agents with seller to determine if changes will accelerate the sale.

108. Place regular weekly update calls to sellers to discuss marketing and pricing.

109. Promptly enter price changes in MLS listings database.

The Offer and the Contract

110. Receive and review all Offer to Purchase contracts submitted by buyers or buyers' agents.

111. Evaluate offer(s) and prepare "net sheet" on each for the owner to compare.

112. Counsel seller on offers. Explain the merits and weaknesses of each component of each offer.

113. Contact buyers' agents to review buyers' qualifications and discuss offer.

114. Fax/deliver Seller's Disclosure to buyer's agent or buyer upon request and prior to offer if possible.
115. Confirm the buyer is pre-qualified by calling the loan officer.
116. Obtain pre-qualification letter on buyer from loan officer.
117. Negotiate all offers on seller's behalf, setting time limit for loan approval and closing date.
118. Prepare and convey any counteroffers, acceptance or amendments to the buyer's agent.
119. Fax copies of contract and all addendums to closing attorney or title company.
120. When an Offer-to-Purchase contract is accepted and signed by the seller, delivered to the buyer's agent.
121. Record and promptly deposit buyer's money into an escrow account.
122. Disseminate "Under-Contract Showing Restrictions" as seller requests.
123. Deliver copies of fully signed Offer to Purchase Contract to sellers.
124. Fax/deliver copies of Offer to Purchase contract to selling agent.
125. Fax copies of Offer to Purchase contract to lender.
126. Provide copies of signed Offer to Purchase contract for office file.
127. Advise sellers in handling additional offers to purchase submitted between contract and closing.
128. Change MLS status to "Sale Pending."
129. Update transaction management program to show "Sale Pending."
130. Review buyer's credit report results—Advise seller of worst and best case scenarios.
131. Provide credit report information to the seller if property is to be seller financed.
132. Assist buyers with obtaining financing and follow up as necessary.
133. Coordinate with lenders on discount points being locked in with dates.
134. Deliver unrecorded property information to the buyer.
135. Order septic inspection, if applicable.
136. Receive and review septic system reports and assess any impact on sale.
137. Deliver a copy of the septic system inspection report to the lender and buyer.
138. Deliver well flow test report copies to lender, buyer and listing file.
139. Verify termite inspection ordered.
140. Verify mold inspection ordered, if required.

#### Tracking the Loan Process

141. Confirm return of verifications of deposit and buyer's employment.
142. Follow loan processing through to the underwriter.
143. Add lenders and other vendors to the transaction management program so agents, buyer and seller can track progress of sale.
144. Contact the lender weekly to ensure processing is on track.
145. Relay final approval of buyer's loan application to seller.

#### Home Inspection

146. Coordinate buyer's professional home inspection with seller.
147. Review home inspector's report.
148. Enter completion into a transaction management tracking software program.
149. Explain the seller's responsibilities of loan limits and interpret any clauses in the contract.
150. Ensure seller's compliance with home inspection clause requirements.

151. Assist seller with identifying and negotiating with trustworthy contractors for required repairs.

152. Negotiate payment and oversee completion of all required repairs on the seller's behalf, if needed.

#### The Appraisal

153. Schedule appraisal.

154. Provide comparable sales used in market pricing to appraiser.

155. Follow up on appraisal.

156. Enter completion into a transaction management program.

157. Assist the seller in questioning the appraisal report if it seems too low.

#### Closing Preparations and Duties

158. Make sure the contract is signed by all parties.

159. Coordinate closing process with buyer's agent and lender.

160. Update closing forms and files.

161. Ensure all parties have all forms and information needed to close the sale.

162. Select location for closing.

163. Confirm closing date and time and notify all parties.

164. Solve any title problems (boundary disputes, easements, etc.) or in obtaining death certificates.

165. Work with the buyer's agent in scheduling and conducting the buyer's final walkthrough prior to closing.

166. Research all tax, HOA, utility, and other applicable prorations.

167. Request final closing figures from the closing agent (attorney or title company).

168. Receive and carefully review closing figures to ensure accuracy.

169. Forward verified closing figures to the buyer's agent .

170. Request a copy of closing documents from the closing agent.

171. Confirm the buyer and buyer's agent received title insurance commitment.

172. Provide "Home Owners Warranty" for availability at closing.

173. Review all closing documents carefully for errors.

174. Forward closing documents to absentee sellers as requested.

175. Review documents with a closing agent (attorney).

176. Provide earnest money deposit from escrow account to closing agent.

177. Coordinate closing with the seller's next purchase, resolving timing issues.

178. Have a "no surprises" closing so that the seller receives a net proceeds check at closing.

179. Refer sellers to one of the best agents at their destination, if applicable.

180. Change MLS status to Sold. Enter sale date, price, selling broker and agent's ID numbers, etc.

181. Close out listing in transaction management program.

#### Follow-Up After Closing

182. Answer questions about filing claims with Home Owner Warranty company, if requested.

183. Attempt to clarify and resolve any repair conflicts if the buyer is dissatisfied.

184. Respond to any follow-up calls and provide any additional information required from office files.