



**Listing To Sell and Selling the Listing
Presented For 3 CE Credit
Triple Play Convention 2016**
Debra J. Asher
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The Home Sale Consultation Strategies

Concept & Examples: Consultation Agenda & Client Notes

Consultant: **Your Name**

Office: Your Office

Phone #: 123-456-7890

Cell #: 123-789-6543

E-mail: bestagent@homeservice.com

___ General Real Estate Market Conditions: The AVERAGE Sale Process Time is: ___

___ The Influence of Banks and Lending Institutions on
Mortgage Rates & Appraisal

___ The Selling of Your Property -Visual overview of major steps in a successful sale

___ My Services During Each Stage of the Process

___ Market Evaluation as it pertains to your property

___ Your Objectives and Time Frame

___ Your Pricing Decision

___ My Fees for Services Rendered

___ Your Decision to Hire

___ Customized Marketing Plan

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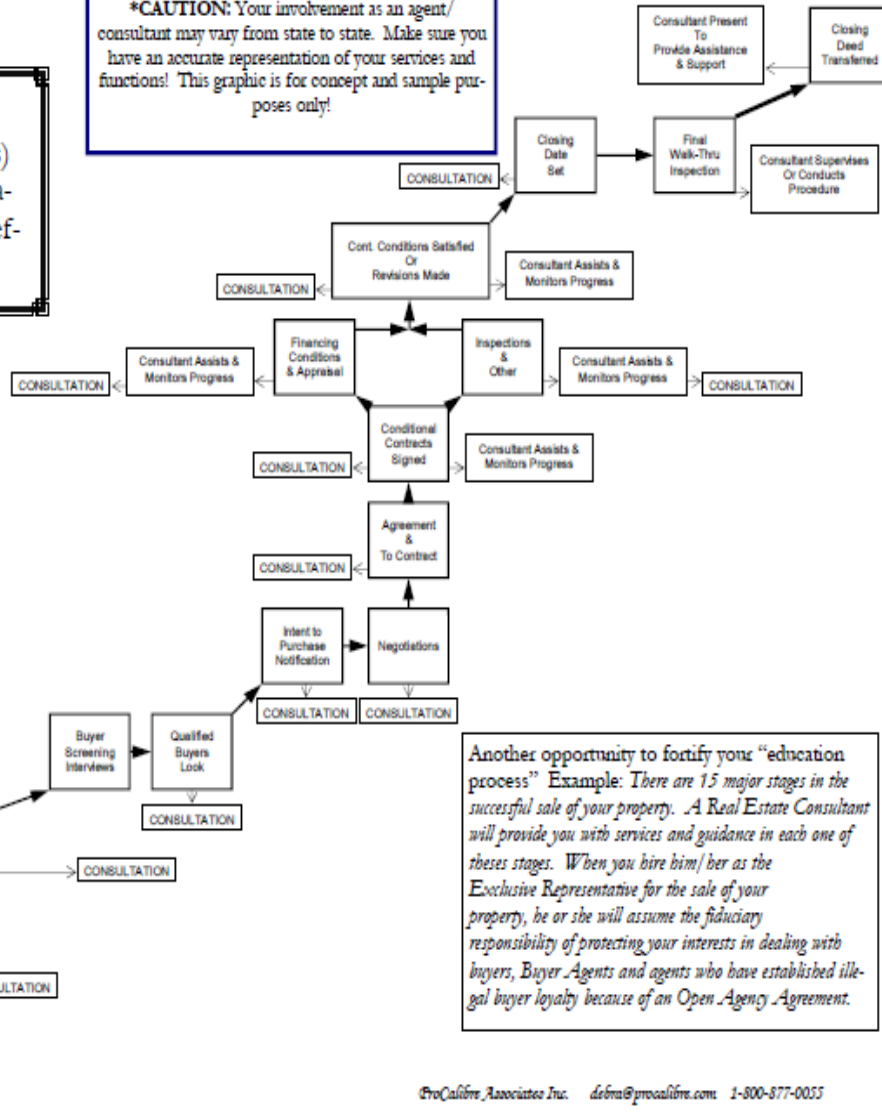
Sample of Steps in a Successful Sale

Major Stages in the Sales Process*

*CAUTION: Your involvement as an agent/consultant may vary from state to state. Make sure you have an accurate representation of your services and functions! This graphic is for concept and sample purposes only!

Provide your name, office name, telephone number (s) and email address if applicable. Easy communication reference is desirable!

Use space for text to reinforce your verbal "education process". Example:
Time frame is dependant on your pricing, terms, accessibility to property and Customized Marketing Plan.



Another opportunity to fortify your "education process" Example: *There are 15 major stages in the successful sale of your property. A Real Estate Consultant will provide you with services and guidance in each one of these stages. When you hire him/her as the Exclusive Representative for the sale of your property, he or she will assume the fiduciary responsibility of protecting your interests in dealing with buyers, Buyer Agents and agents who have established illegal buyer loyalty because of an Open Agency Agreement.*



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Purchaser Information **Date:** _____

Name(s): _____

Current Address: _____

Phone: (H) _____ (W) _____ Fax _____ Cell _____

e-mail: _____

Total Number of Occupants: _____

Names & Ages of Children: (asking only for the purpose of providing interesting info for kids)

Other(s): _____

Who will be involved in the decision making?: _____

Does anyone require special housing and/or transportation considerations: Y N

Specify: _____

When would you like to occupy your new home?: WITHIN: 30 60 90 120 days.

At what stage of the home buying process are you at:

Just Looking
 Fact Finding and Awareness
 Comparing and Evaluating
 Have it Narrowed Down

When did you start this process?: _____

Have you arrived at this stage on your own or with the assistance of a Real Estate Agent/Consultant?:

Alone
 R.E. Agnt./Consult.
Both

How many homes have you been in and inspected?: _____

Will this be a cash purchase or will you choose to finance? Cash Finance

Have you had a financial consultation? Y N

Have the results been reviewed by anyone? Y N

Do you have an attorney to assist you during the contract & closing stages? Y N



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Consultant: **YOUR NAME** **SAMPLE: PRE-PURCHASE CONSULTATION**

Your Office Name:

Office Tel.#:

PURCHASER/INVESTOR: Buyers Name(s)

DATE: _____

____ INITIAL CONSIDERATIONS

____ RE-EVALUATION

<u>NEEDS/ESSENTIALS</u>	<u>OPTIONS (IN ORDER OF PRIORITY)</u>	<u>VALUE RANGE</u>

ADDITIONAL NOTES/CLARIFICATION



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Concept & Example* of: SERVICE COMMITMENT TO THE PURCHASER

As a licensed “Your State” Agent and Consultant for **YOUR OFFICE NAME**, I am dedicated to working with you by providing service that is professional, courteous and responsive in helping you find and purchase a property. To meet this commitment, I agree to and will perform the following services:

*Note: These are things that you do! PUT IT IN WRITING!**

1. Present you with an Agency Disclosure document in which my fiduciary responsibilities are identified and explained.
2. Consult with you to determine your particular real estate needs.
3. Review and or establish your financial ability and match it to a purchase range.
4. Make you aware of and explain to you alternative methods of purchasing and financing.
5. Familiarize you with the community to assist you with your neighborhood, amenity and property choices. This may include properties that we are marketing as well as those offered through other real estate companies.
6. Explain local real estate procedures, related paperwork, documents and chronological order of events.
7. Offer and show you properties in accordance with Fair Housing Regulations and ethical real estate practices.

*** This is ONLY for EXAMPLE PURPOSES. When compiling your list, make sure you adhere to your State’s Licensing Laws**

8. Disclose material facts known about the property. Respond accurately and honestly to your questions concerning the property.
9. Assist you in preparing for and arranging mortgage financing.
10. Assist you in preparing Purchase paperwork.
11. Promptly present/deliver all written Intent to Purchase paperwork to the seller or to their designated representatives as prescribed by law or Multiple Listing Service procedures.
12. Promptly inform you as to the seller’s response to your offer and to counsel with you accordingly.
13. Act as your central point of contact and liaison between any other service providers you choose to include in this transaction, as permitted by law or local practice.
14. Monitor and keep you informed of the progress of this transaction.
15. Provide you with information, explanations, guidance and support throughout the purchase process.
16. Be available and promptly respond to any requests you have to help make this purchase a pleasant, stressless and successful experience for you.
17. How else may I be of assistance to you?

By: _____
Your Name

Date: ____



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SAMPLE OF: **PURCHASER EVALUATION NOTES**

Consultant: **YOUR NAME**
Your Office Name

Date: _____
Office or Cell Number _____

PROPERTY: **INSPECTION** **EVALUATION** **SELECTION**

Property Address: _____ Price: _____

“Drive Up” Impression: Like Dislike Neutral

Meets our Essential Needs: Yes No

What it had from our list of OPTIONALS: _____

Home’s most outstanding feature(s):

Dislikes:

I/We *would / would not* consider purchasing this property because:

SAMPLE
Whatever format you create, make it simple, clear and have enough room for legible writing. Make plenty of copies for use with EACH property inspected!