



# PRESENTATION ACTIVITIES

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1. Respond to prospective buyer(s) inquiries.
2. Interview the buyer(s) prospect and obtain buyer(s) personal information and explain the homebuying process.
3. Determine if REALTOR® has a conflicting brokerage relationship or other conflict of interest with the buyer(s).
4. Discuss the pre-approval financial process with the buyer(s).
5. Suggest at least three mortgage lenders to assist buyer(s) in becoming pre-approved.
6. Determine through discovery the buyer(s)' preferences in a home as well as the location, price, size, type of home, special needs, and ADA accommodations etc.







# PRE-CONTRACT ACTIVITIES

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7. Obtain and review pre-approval letter from lender.
8. Search the MLS for properties that meet the buyer(s)' criteria.
9. Make appointments with seller(s) or seller(s)' listing broker to show the properties selected by the buyer(s).
10. Show the buyer(s) their selected properties.







# OFFER & CONTRACT ACTIVITIES

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11. Obtain a "good faith estimate" from the buyer(s)' lender for the target purchase price and review with buyer(s).
12. Meet with buyer(s) to preview offer, contract form, addenda, and miscellaneous forms.
13. Complete offer to purchase and all addenda.
14. Provide seller(s)' disclosure forms to buyer(s).
15. Submit offer to purchase signed by buyer(s) to seller(s)' broker.
16. Provide credit report information to seller(s) if property will be seller-financed.
17. Provide buyer(s) a copy of all forms used in making the offer.
18. Negotiate all offers on buyer(s)' behalf.
19. Prepare and convey any counteroffers, acceptance, or amendments to seller(s)' broker.
20. Verify final offer is signed by all parties ("contract"), and that all necessary documents are attached.
21. Deliver fully signed and initialed contract to buyer.
22. Distribute signed contracts to all involved parties (buyer(s), seller(s), title company, lender, seller(s)/buyer(s) broker, and closing agent) and provide contact information as needed.
23. Record and promptly deposit buyer(s)' earnest money in escrow account or deliver to closing agent and obtain a receipt.
24. Provide receipt of escrow deposit to seller(s)' broker.
25. Place copies of signed contract in office file.
26. Inform buyer(s) of additional offers to purchase that are submitted between effective date of contract and closing.
27. Update listing file to show "sale pending."





# HOME & TERMITE INSPECTION ACTIVITIES

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28. Provide buyer(s) with at least three home inspection companies and three WDO inspection companies from which to select.
29. Coordinate buyer(s)' professional home and WDO inspection with seller(s)' broker
30. Review home and WDO inspection reports with buyer.
31. Enter completion of home and WDO inspection reports into the listing file.
32. Order septic system, well, or mold inspections, if applicable.
33. Receive and review septic system, well, or mold reports with buyer(s) and note any possible impact on sale.
34. Provide copy of septic system, well and mold inspection reports, if any, to lender and seller(s).
35. Verify seller(s)' compliance with all inspection repair requirements.







# TRACKING THE LOAN PROCESS ACTIVITIES

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36. Coordinate with lender on discount points being locked in with dates.
37. Confirm verifications of deposit and buyer(s)' employment have been returned.
38. Contact lender weekly to verify processing is on track.
39. Follow loan processing through to the underwriter.
40. Relay final approval of buyer(s)' loan application to seller(s).







# **CLOSING PREPARATION ACTIVITIES**

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46. Coordinate closing process with seller(s)' broker, lender, and closing agent.
47. Update closing forms and files.
48. Verify all parties have all forms and information needed to close the sale.
49. Assist in obtaining power of attorney or trust documents, as required.
50. Work with seller(s)' broker in scheduling and conducting buyer(s)' final walk-through prior to closing.
51. Confirm buyer(s) has received title insurance commitment.
52. Confirm location, date, and time where closing will be held and notify all parties.
53. Confirm with closing agent that all tax, HOA, utility, and other applicable pro-rations have been resolved.
54. Request final closing figures from closing agent.
55. Review and verify closing figures on HUD statement with buyer(s).
56. Forward verified closing figures to seller(s)' broker and confirm seller(s)' broker has received and reviewed closing figures.
57. Verify that seller(s)' broker has provided homeowners warranty, if purchased, at closing.
58. Forward closing documents to absentee buyer(s) as requested, if applicable.
59. Provide earnest money deposit check from escrow account to closing agent. If closing agent is holding escrow funds make sure it appears on the final HUD.
60. Confirm collected funds from buyer(s) are available for closing.
61. Explain filing for homestead exemption.
62. Verify transfer of all keys (house, mailbox, and HOA/community), garage- door openers, HOA/security/gate access codes, pool equipment, and appliance manuals.
63. Close out listing.





# AFTER CLOSING ACTIVITIES

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- 64. Assist with filing claims with homeowner's warranty company, if requested.
- 65. Respond to any follow-up calls and provide any additional information required from office files.
- 66. Follow up with buyer(s).

