



Consumer Service Checklist

Before a property is listed

1. Make appointment with seller for listing presentation
2. Send seller a written or e-mail confirmation of listing appointment and call to confirm
3. Review pre-appointment questions
4. Research all comparable currently listed properties
5. Research sales activity for past 18 months from MLS and public records databases
6. Research "Average Days on Market" for this property of this type, price range and location
7. Download and review property tax roll information
8. Prepare "Comparable Market Analysis" (CMA) to establish fair market value
9. Obtain copy of subdivision plat/complex lay-out
10. Research property's ownership & deed type
11. Research property's public record information for lot size & dimensions
12. Research and 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 listing presentation package with above materials
17. Perform exterior "Curb Appeal Assessment" of subject property
18. Compile and assemble formal file on property
19. Confirm current public schools and explain impact of schools on market value
20. Review listing appointment checklist to ensure all steps and actions have been completed

Attention to Detail Keeps Buyers & Sellers on Point From Fences to Fees

21. Review current title information
 22. Measure interior room sizes
 23. Confirm lot size via owner's copy of certified survey, if available
 24. Note any and all unrecorded property lines, agreements, easements
 25. Obtain house plans, if applicable and available
 26. Review house plans and make copy
 27. Order plat map for retention in property's listing file
 28. Prepare showing instructions for buyers' agents and agree on showing time with seller
 29. Obtain current mortgage loan(s) information: companies and & loan account number
 30. Verify current loan information with lender(s)
 31. Check assumability of loan(s) and any special requirements
 32. Discuss possible buyer financing alternatives and options with seller
 33. Review current appraisal if available
 34. Identify Home Owner Association manager if applicable
 35. Verify Home Owner Association Fees with manager - mandatory or optional and current annual fee
 36. Order copy of Homeowner Association bylaws, if applicable
 37. Research electricity availability and supplier's name and phone number
 38. Calculate average utility usage from last 12 months of bills
 39. Research and verify city sewer/septic tank system
 40. Water System: Calculate average water fees or rates from last 12 months of bill
 41. Well Water: Confirm well status, depth and output from Well Report
 42. Natural Gas: Research/verify availability and supplier's name and phone number
 43. Verify security system, current term of service and whether owned or leased
 44. Termite Warranty
 45. Ascertain need for lead-based paint disclosure
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46. Prepare detailed list of property amenities and assess market impact

 47. Prepare detailed list of property's "Inclusions & Conveyances with Sale"

 48. Compile list of completed repairs and maintenance items

 49. Send "Vacancy Checklist" to seller if property is vacant

 50. Explain benefits of Home Owner Warranty to seller

 51. Assist sellers with completion and submission of Home Owner Warranty Application

 52. When received, place Home Owner Warranty in property file for conveyance at time of sale

 53. Have extra key made for lockbox

 54. Verify if property has rental units involved. And if so:
 55. Make copies of all leases for retention in listing file

 56. Verify all rents & deposits

 57. Inform tenants of listing and discuss how showings will be handled

 58. Arrange for installation of yard sign

 59. Have seller complete Seller's Disclosure form

 60. "New Listing Checklist" Completed

 61. Review results of Curb Appeal Assessment with seller and provide suggestions to improve salability

 62. Review results of Interior Décor Assessment and suggest changes to shorten time in market

 63. Load listing into transaction management software program

Multiple Listing Service Database

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64. Prepare MLS Profile Sheet -- Agent is responsible for "quality control" and accuracy of listing data

 65. Have seller review and sign MLS Profile Sheet

 66. Enter property data from Profile Sheet into MLS Listing Database

 67. Proofread MLS database listing for accuracy - including proper placement in map function

 68. Add property to company's Active Listings list

69. Provide seller with signed copies of Listing Agreement and MLS Profile Sheet C Form within 48 hours

70. Take additional photos for upload into MLS and use in flyers. Discuss efficacy of panoramic photography

Buying & Selling, It's More Than a Sign in the Yard

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

72. Coordinate showings with owners, tenants, and other Realtors®. Return all calls; weekends included

73. Install electronic lock box if authorized by owner. Program with agreed-upon show time windows

74. Prepare mailing and contact list

75. Generate mail-merge letters to contact list

76. Order "Just Listed" labels & reports

77. Prepare flyers & feedback faxes

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

79. Prepare property marketing brochure for seller's review

80. Arrange for printing or copying of supply of marketing brochures or fliers

81. Place marketing brochures in all company agent mail boxes

82. Upload listing to company and agent Internet site, if applicable

83. Mail Out "Just Listed" notice to all neighborhood residents

84. Advise Network Referral Program of listing

85. Provide marketing data to buyers coming through international relocation network

86. Provide marketing data to buyers coming from referral network

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

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

89. Price changes conveyed promptly to all Internet groups

90. Reprint/supply brochures promptly as needed

91. Loan information reviewed and updated in MLS as required

92. Feedback e-mails/faxes sent to buyers' agents after showings

93. Review weekly Market Study

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

95. Place regular weekly update calls to seller to discuss marketing & pricing

96. Promptly enter price changes in MLS listing database

REALTOR Follow the Money ORS Can Make Contracts Make Sense

97. Receive and review all Offer to Purchase contracts submitted by buyers or buyer agents.

98. Evaluate offer(s) and prepare a "net sheet" on each for the owner for comparison purposes

99. Counsel seller on offers. Explain merits and weakness of each component of each offer

100. Contact buyers' agents to review buyer's qualifications and discuss offer

101. Fax/deliver Seller's Disclosure to buyer's agent or buyer upon request and price offer if possible

102. Confirm buyer is pre-qualified by calling Loan Officer

103. Obtain pre-qualification letter on buyer from Loan Officer

104. Negotiate all offers on seller's behalf, setting time limit for loan approval and closing date

105. Prepare and convey any counteroffers, acceptance or amendments to buyer's

106. Fax copies of contract and all addendums to closing attorney or title company

107. When Offer to Purchase Contract is accepted and signed by seller, deliver to buyer agent

108. Record and promptly deposit buyer's earnest money in escrow account.

109. Disseminate "Under-Contract Showing Restrictions" as seller requests

110. Deliver copies of fully signed Offer to Purchase contract to seller

111. Fax/deliver copies of Offer to Purchase contract to Selling Agent

112. Fax copies of Offer to Purchase contract to lender

113. Provide copies of signed Offer to Purchase contract for office file

114. Advise seller in handling additional offers to purchase submitted between cont and closing

115. Change status in MLS to "Sale Pending"

116. Update transaction management program to show "Sale Pending"

117. Review buyer's credit report results -- Advise seller of worst and best case sce

118. Provide credit report information to seller if property will be seller-financed

119. Assist buyer with obtaining financing, if applicable and follow-up as necessary

120. Coordinate with lender on Discount Points being locked in with dates

121. Deliver unrecorded property information to buyer

122. Verify septic system inspection ordered, if applicable

123. Receive and review septic system report and assess any possible impact on s

124. Deliver copy of septic system inspection report lender & buyer

125. Deliver Well Flow Test Report copies to lender & buyer and property listing file

126. Verify termite inspection ordered

127. Verify mold inspection ordered, if required

Follow the Money

128. Confirm Verifications Of Deposit & Buyer's Employment Have Been Returned

129. Follow Loan Processing Through To The Underwriter

130. Add lender and other vendors to transaction management program so agents, and seller can track progress of sale

131. Contact lender weekly to ensure processing is on track

132. Relay final approval of buyer's loan application to seller

Guide Consumers Through the Inspection Process

133. Coordinate with seller buyer's access for professional home inspection

134. Review home inspector's report

135. Enter completion into transaction management tracking software program

136. Explain seller's responsibilities with respect to loan limits and interpret any clai in the contract

137. Ensure seller's compliance with Home Inspection Clause requirements

138. Recommend or assist seller with identifying and negotiating with trustworthy contractors to perform

139. any required repairs

Making Accurate Sense of the Numbers:

140. Schedule Appraisal

141. Provide comparable sales used in market pricing to Appraiser

142. Follow-Up On Appraisal

143. Enter completion into transaction management program

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

Closing

145. Contract Is Signed By All Parties

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

147. Update closing forms & files

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

149. Select location where closing will be held

150. Confirm closing date and time and notify all parties

151. Assist in solving any title problems (boundary disputes, easements, etc) or in obtaining Death Certificates

152. Work with buyer's agent in scheduling and conducting buyer's Final Walk-Thru to closing

153. Research all tax, HOA, utility and other applicable perorations

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

155. Receive & carefully review closing figures to ensure accuracy of preparation

156. Forward verified closing figures to buyer's agent

157. Request copy of closing documents from closing agent

158. Confirm buyer and buyer's agent have received title insurance commitment

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

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160. Review all closing documents carefully for errors
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161. Forward closing documents to absentee seller as requested
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162. Review documents with closing agent (attorney)
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163. Provide earnest money deposit check from escrow account to closing agent
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164. Coordinate this closing with seller's next purchase and resolve any timing problems
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165. Have a "no surprises" closing so that seller receives a net proceeds check at closing
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166. Refer sellers to one of the best agents at their destination, if applicable
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167. Change MLS status to Sold. Enter sale date, price, selling broker and agent's numbers, etc.
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168. Close out listing in transaction management program
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After the Close

169. Answer questions about filing claims with Home Owner Warranty company if requested
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170. Attempt to clarify and resolve any conflicts about repairs if buyer is not satisfied
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171. Respond to any follow-on calls and provide any additional information required in office files.



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