



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

Make All The Difference with Listings

21. Give seller an overview of current market conditions and projections
 22. Review agent's and company's credentials and accomplishments in the market
 23. Present company's profile and position or "niche" in the marketplace
 24. Present CMA Results To Seller, including Comparables, Solds, Current Listings Expired
 25. Offer pricing strategy based on professional judgment and interpretation of current market conditions
 26. Discuss Goals With Seller To Market Effectively
 27. Explain market power and benefits of Multiple Listing Service
 28. Explain market power of web marketing, IDX and REALTOR.com
 29. Explain the work the brokerage and agent do "behind the scenes" and agent's availability on weekends
 30. Explain agent's role in taking calls to screen for qualified buyers and protect seller from curiosity seekers
 31. Present and discuss strategic master marketing plan
 32. Explain different agency relationships and determine seller's preference
 33. Review and explain all clauses in Listing Contract & Addendum and obtain seller's signature
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Attention to Detail Keeps Buyers & Sellers on Point From Fences to Fees

34. Review current title information
 35. Measure interior room sizes
 36. Confirm lot size via owner's copy of certified survey, if available
 37. Note any and all unrecorded property lines, agreements, easements
 38. Obtain house plans, if applicable and available
 39. Review house plans and make copy
 40. Order plat map for retention in property's listing file
 41. Prepare showing instructions for buyers' agents and agree on showing time with seller
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42. Obtain current mortgage loan(s) information: companies and & loan account nu
43. Verify current loan information with lender(s)
44. Check assumability of loan(s) and any special requirements
45. Discuss possible buyer financing alternatives and options with seller
46. Review current appraisal if available
47. Identify Home Owner Association manager if applicable
48. Verify Home Owner Association Fees with manager - mandatory or optional and current annual fee
49. Order copy of Homeowner Association bylaws, if applicable
50. Research electricity availability and supplier's name and phone number
51. Calculate average utility usage from last 12 months of bills
52. Research and verify city sewer/septic tank system
53. Water System: Calculate average water fees or rates from last 12 months of bill
54. Well Water: Confirm well status, depth and output from Well Report
55. Natural Gas: Research/verify availability and supplier's name and phone number
56. Verify security system, current term of service and whether owned or leased
57. Termite Warranty
58. Ascertain need for lead-based paint disclosure
59. Prepare detailed list of property amenities and assess market impact
60. Prepare detailed list of property's "Inclusions & Conveyances with Sale"
61. Compile list of completed repairs and maintenance items
62. Send "Vacancy Checklist" to seller if property is vacant
63. Explain benefits of Home Owner Warranty to seller
64. Assist sellers with completion and submission of Home Owner Warranty Application
65. When received, place Home Owner Warranty in property file for conveyance at time of sale
66. Have extra key made for lockbox
67. Verify if property has rental units involved. And if so:

68. Make copies of all leases for retention in listing file

69. Verify all rents & deposits

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

71. Arrange for installation of yard sign

72. Have seller complete Seller's Disclosure form

73. "New Listing Checklist" Completed

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

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

76. Load listing into transaction management software program

Multiple Listing Service Database

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

78. Have seller review and sign MLS Profile Sheet

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

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

81. Add property to company's Active Listings list

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

83. 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

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

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

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

87. Prepare mailing and contact list

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88. Generate mail-merge letters to contact list

 89. Order "Just Listed" labels & reports

 90. Prepare flyers & feedback faxes

 91. Review comparable MLS listings regularly to ensure property remains competitive 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 fliers

 94. Place marketing brochures in all company agent mail boxes

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

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

 97. Advise Network Referral Program of listing

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

 99. Provide marketing data to buyers coming from referral network

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

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

 102. Price changes conveyed promptly to all Internet groups

 103. Reprint/supply brochures promptly as needed

 104. Loan information reviewed and updated in MLS as required

 105. Feedback e-mails/faxes sent 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 seller to discuss marketing & pricing

 109. Promptly enter price changes in MLS listing database

REALTOR Follow the Money ORS Can Make Contracts Make Sense

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

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

112. Counsel seller on offers. Explain merits and weakness of each component of offer
113. Contact buyers' agents to review buyer's qualifications and discuss offer
114. Fax/deliver Seller's Disclosure to buyer's agent or buyer upon request and price offer if possible
115. Confirm buyer is pre-qualified by calling 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 buyer's offer
119. Fax copies of contract and all addendums to closing attorney or title company
120. When Offer to Purchase Contract is accepted and signed by seller, deliver to buyer's agent
121. Record and promptly deposit buyer's earnest money in escrow account.
122. Disseminate "Under-Contract Showing Restrictions" as seller requests
123. Deliver copies of fully signed Offer to Purchase contract to seller
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 seller in handling additional offers to purchase submitted between contract and closing
128. Change status in MLS 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 seller if property will be seller-financed
132. Assist buyer with obtaining financing, if applicable and follow-up as necessary
133. Coordinate with lender on Discount Points being locked in with dates
134. Deliver unrecorded property information to buyer
135. Verify septic system inspection ordered, if applicable

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

 - 137. Deliver copy of septic system inspection report lender & buyer

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

 - 139. Verify termite inspection ordered

 - 140. Verify mold inspection ordered, if required

Follow the Money

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

 - 142. Follow Loan Processing Through To The Underwriter

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

 - 144. Contact lender weekly to ensure processing is on track

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

Guide Consumers Through the Inspection Process

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

 - 147. Review home inspector's report

 - 148. Enter completion into transaction management tracking software program

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

 - 150. Ensure seller's compliance with Home Inspection Clause requirements

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

 - 152. any required repairs

Making Accurate Sense of the Numbers:

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- 153. Schedule Appraisal

 - 154. Provide comparable sales used in market pricing to Appraiser

 - 155. Follow-Up On Appraisal

 - 156. Enter completion into transaction management program

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

Closing

158. Contract Is Signed By All Parties
 159. Coordinate closing process with buyer's agent and lender
 160. Update closing forms & files
 161. Ensure all parties have all forms and information needed to close the sale
 162. Select location where closing will be held
 163. Confirm closing date and time and notify all parties
 164. Assist in solving any title problems (boundary disputes, easements, etc) or in obtaining Death Certificates
 165. Work with buyer's agent in scheduling and conducting buyer's Final Walk-Thru to closing
 166. Research all tax, HOA, utility and other applicable perorations
 167. Request final closing figures from closing agent (attorney or title company)
 168. Receive & carefully review closing figures to ensure accuracy of preparation
 169. Forward verified closing figures to buyer's agent
 170. Request copy of closing documents from closing agent
 171. Confirm buyer and buyer's agent have 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 seller as requested
 175. Review documents with closing agent (attorney)
 176. Provide earnest money deposit check from escrow account to closing agent
 177. Coordinate this closing with seller's next purchase and resolve any timing prot
 178. Have a "no surprises" closing so that seller receives a net proceeds check at c
 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 numbers, etc.
 181. Close out listing in transaction management program
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After the Close

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



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