MREA: Buyer Specialist
Handout

Forms & Checklists
Buyer Interview

Referral: Yes   No   Referral source: __________________________________________________________

Date: ___________________________ Name: ________________________________________________

Home phone: ___________________________ Work phone: _________________________________

Cell phone: ___________________________ Pager: __________________________________________

Fax: _________________________________ Email: __________________________________________

Best time to contact you: ______________________________________________________________

Present address: ________________________________________________________________

City/State: ___________________________ Zip: ________________________________

Own or Rent?   ☐ Yes   ☐ No   If you own, must you sell your home first? _________________

Relocating?   ☐ Yes   ☐ No   If so, where? __________________________________________

Currently working with an agent?   ☐ Yes   ☐ No   If so, who? _________________________

Specific Needs/Wants:

Bedrooms: 1 2 3 4 5

Bathrooms: 1 2 3 4

Living Rooms: 1 2 3

Garage: 1 2 3

Levels: 1 2 3

Square ft.: ___________________________

Pool: ☐ Yes   ☐ No   Spa: ☐ Yes   ☐ No

Construction: brick   stone   frame   block

Acreage: ☐ Yes   ☐ No   If so, size? ___________________________________________

Central Air/Heat: ☐ Yes   ☐ No

Specific features (fireplace, etc): __________________________________________________________

Specific additions/area: ________________________________________________________________

Schools preferred: ________________________________________________________________

Price range: ________________________________________________________________

Payment Method: ☐ Mortgage   ☐ Cash   ☐ Other: _________________________________

Do you need a lender?   ☐ Yes   ☐ No   Name: _________________________________

Phone: ____________________________

Payment range: ___________   Down payment: ___________

How soon do you need to be in the home? ________________________________________________

Buyer Consultation Appointment:

Date: __________________________

Time: _______________
# Buyer Log

<table>
<thead>
<tr>
<th>Time</th>
<th>Buyer Name</th>
<th>Property Called On</th>
<th>Phone</th>
<th>Source</th>
<th>Appt. Date</th>
<th>Appt. Time</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tr>
</tbody>
</table>
Referral Reward Form

Date ____________
Send a Referral Reward to ______________________________________
Address _________________________________________________________
                                                ______________________
Phone ___________________________________________________________
Referral’s Name _________________________________________________
Address _________________________________________________________
                                                ______________________
Phone ___________________________________________________________

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# Referral Information Form (page 1 of 2)

## Section 1 - Receiving Office

<table>
<thead>
<tr>
<th>TO: Agent:</th>
<th>FROM: Agent:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Firm Name:</td>
<td>Firm Name:</td>
</tr>
<tr>
<td>Address:</td>
<td>Address:</td>
</tr>
<tr>
<td>City/State/Zip:</td>
<td>City/State/Zip:</td>
</tr>
<tr>
<td>Business Phone:</td>
<td>Business Phone:</td>
</tr>
<tr>
<td>Home Phone:</td>
<td>Home Phone:</td>
</tr>
<tr>
<td>Fax Phone:</td>
<td>Fax Phone:</td>
</tr>
</tbody>
</table>

## Section 2 - Seller Information

<table>
<thead>
<tr>
<th>Seller Name:</th>
<th>When to make initial contact:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address:</td>
<td>Property address to be listed:</td>
</tr>
<tr>
<td>City/State/Zip:</td>
<td></td>
</tr>
<tr>
<td>Business Phone:</td>
<td></td>
</tr>
<tr>
<td>Home Phone:</td>
<td>Additional Helpful Information:</td>
</tr>
<tr>
<td>Fax Phone:</td>
<td></td>
</tr>
</tbody>
</table>

## Section 3 - Buyer Information

<table>
<thead>
<tr>
<th>Buyer's Name:</th>
<th>New Employer:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address:</td>
<td>Address:</td>
</tr>
<tr>
<td>City/State/Zip:</td>
<td>City/State/Zip:</td>
</tr>
<tr>
<td>Business Phone:</td>
<td>Position and Approximate Salary:</td>
</tr>
<tr>
<td>Home Phone:</td>
<td>Must home be sold first?</td>
</tr>
<tr>
<td>Fax Phone:</td>
<td>Company buyout?</td>
</tr>
<tr>
<td>Preferred Location:</td>
<td>Cash Available for Purchase and Closing Costs:</td>
</tr>
<tr>
<td>Size and Type of Home Desired:</td>
<td>Contact Buyer at this no. first:</td>
</tr>
<tr>
<td>Price Range:</td>
<td>Expected Arrival Date: Moving Date:</td>
</tr>
<tr>
<td>Number in Family:</td>
<td>Comments:</td>
</tr>
<tr>
<td>Adults:</td>
<td></td>
</tr>
<tr>
<td>Children:</td>
<td></td>
</tr>
<tr>
<td>Age:</td>
<td></td>
</tr>
<tr>
<td>Age:</td>
<td></td>
</tr>
</tbody>
</table>

## Section 4 – Realtor’s Acceptance of Referral

<table>
<thead>
<tr>
<th>Prospect's Name:</th>
<th>Comment:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date Contacted:</td>
<td></td>
</tr>
<tr>
<td>Date of First Appointment:</td>
<td></td>
</tr>
</tbody>
</table>

WE ACCEPT THIS REFERRAL, AND WHEN THE SALE IS CONSUMMATED, WE AGREE TO SEND _____% (OF THE GROSS COMMISSION) REFERRAL FEE. WE WILL ENCLOSE DETAILS OF THE SALE WITH THE CHECK.

Receiving Sales Associate Signature: Date: / / Receiving Broker's Signature: Date: / /
Referral Information Form (page 2 of 2)

1. **Sending Agent Procedures**
   1. Contact the chosen agent to see if he or she can provide the service in which you are interested. If you do not know an agent in that Market Center, it may be necessary to speak with the Team Leader to seek assistance in selecting a receiving agent. Be sure that the agent is completely familiar with the area the customer has indicated or where you have a potential listing.

   2. Confirm the referral fee. The customary referral fee among agents in KELLER WILLIAMS® Realty is 20% of the side of the transaction. (20% of the gross listing or selling side of the commission.)

   3. Complete your portion of the referral form and send two copies to the agent.

   4. Give a copy of the referral form to your Team Leader.

   5. Follow-up with the customer to make sure the agent has contacted him and is satisfied with the receiving agent.

2. **Receiving Agent Procedures**
   1. Upon receiving the referral form, contact the customer.

   2. Complete your portion of the referral form on each copy. Return one copy to the sending agent and retain one copy for your records. Be sure to include a copy of the contract pending file when a sale is consummated.

   3. Give a copy to your Team Leader.

3. **Completing the KELLER WILLIAMS® Realty Referral Information Form**
   **SECTION 1 - RECEIVING OFFICE/SENDING OFFICE:** This identifies the receiving/sending agents. This portion should be completed by the sending agent.

   **SECTION 2 - SELLER INFORMATION:** This is used when sending out a listing referral. This portion should be completed by the sending agent.

   **SECTION3 - BUYER INFORMATION:** This contains data about the customer. It should be completed by the sending agent.

   **SECTION 4 - REALTOR’S ACCEPTANCE OF REFERRAL:** This should be completed by the receiving agent and returned to the sending agent.
The *Exceeding Buyer Expectations Checklist* is designed to exceed all expectations of service any client might have.

<table>
<thead>
<tr>
<th>Complete?</th>
<th>When</th>
<th>What (examples)</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Converting Buyer Leads</td>
<td>Hang <em>Welcome sign</em></td>
<td>For buyer consultation</td>
</tr>
<tr>
<td></td>
<td>Converting Buyer Leads</td>
<td>Logo Velour Bag with Chocolates</td>
<td>For buyer consultation</td>
</tr>
<tr>
<td></td>
<td>Converting Buyer Leads</td>
<td>Logo Tote Bag with Buyer’s Book</td>
<td>Given when buyer signs Buyer Representation Agreement</td>
</tr>
<tr>
<td></td>
<td>Servicing Buyers</td>
<td>Basket (fill with water, snacks, etc.)</td>
<td>Given before taking clients out on showings</td>
</tr>
<tr>
<td></td>
<td>Servicing Buyers</td>
<td>Logo Mug with Cookies</td>
<td>Delivered to the buyer’s workplace when offer goes under contract</td>
</tr>
<tr>
<td></td>
<td>Coordinating Buyer</td>
<td>Movie Tickets</td>
<td>Given when all contingencies are removed</td>
</tr>
<tr>
<td></td>
<td>Transaction &amp; Closing</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Coordinating Buyer</td>
<td>T-shirts and Vinyl Envelope</td>
<td>Brought to closing table</td>
</tr>
<tr>
<td></td>
<td>Transaction &amp; Closing</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Completing Post-Closing</td>
<td>Lunch</td>
<td>Delivered to buyer on moving day</td>
</tr>
</tbody>
</table>

*Always include two of your business cards when delivering items to the buyer.*
Sample Buyer Consultation Packet Checklist
(exact contents of the packet will be determined by the Mega Agent)

Client Name: _________________________   Property: ____________________________________________

The Buyer Consultation Packet should contain the following:

<table>
<thead>
<tr>
<th>Complete ?</th>
<th>Activity (forms)</th>
<th>Assigned To</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Buyer Book (bound booklet with team name, contact information, and logo on cover) containing the following:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>o Team Mission Statement</td>
<td></td>
</tr>
<tr>
<td></td>
<td>o Introduction to the Team</td>
<td></td>
</tr>
<tr>
<td></td>
<td>o Testimonials</td>
<td></td>
</tr>
<tr>
<td></td>
<td>o Getting to Know Your Realtor</td>
<td></td>
</tr>
<tr>
<td></td>
<td>o Buying vs. Renting</td>
<td></td>
</tr>
<tr>
<td></td>
<td>o Buying a Home (FAQ)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>o Step by Step Process (with space for Dates)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>o Moving Checklist</td>
<td></td>
</tr>
<tr>
<td></td>
<td>o Service Provider List</td>
<td></td>
</tr>
<tr>
<td></td>
<td>o Notes on Viewed Properties</td>
<td></td>
</tr>
<tr>
<td></td>
<td>o Business Cards (minimum of 2)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Homebuyer’s 10’s Sheet</td>
<td></td>
</tr>
<tr>
<td></td>
<td>VIP Questionnaire</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Who Do You Call When…</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Buyer Representation Agreement (state specific)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Addendum to Buyer Representation Agreement (state specific)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Agency Disclosure (state specific)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Affiliated Business Arrangement Disclosure</td>
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<tr>
<td></td>
<td>MLS Search Printout (printed from computer)</td>
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</tbody>
</table>
Team Mission Statement

Click Here and Type Your Contact Information

不得转载 

Mission Statement

Click Here and Type Mission Statement

*Example:* I am a passionate and talented consultant dedicated to providing fiduciary real estate consulting and marketing services to my clients.

不得转载 

Vision Statement

Click Here and Type Vision Statement

*Example:* To be the Real Estate Consultant of choice.

不得转载 

Business Experience

*Example:*

- Keller Williams Realty 1998-Present
- ...
- ...

不得转载 

Professional Designations

- ...
- ...
- ...

不得转载 

Secondary Specialties

- ...
- ...
- ...

不得转载 

Family

- ...
- ...

不得转载 

Hobbies

- ...
- ...
- ...

不得转载
Introduction to the Team

[Click here and type your team name - phone number]
Keller Williams Realty
[Click here and type your team website]

Team Resume

▷ Professional Qualifications
  • [Click here and type Professional Qualifications]

▷ Business Achievements
  • [Click here and type Business Achievements]

▷ Professional Designations
  • [Click here and type Professional Designations]

▷ Education
  • [Click here and type Education]
Getting to Know Your Realtor

If you’re interviewing other Realtors, ask them these important twenty questions

1. Do you work as a full-time Realtor?  ____Yes ____No
2. How long have you been selling real estate?
3. How many homes do you sell in a year?
4. Do you have a list of references that we may call?
5. How many full-time assistants do you have?  Do you have a listings coordinator, a closing coordinator, a team coordinator?
6. What is your average time on the market compared to the Multiple Listing Service (MLS) average?
7. What is your average list to sell ratio compared to the MLS average?
8. Where do you rank in your office?  Top Lister?  Top Seller?  For how many years?
9. Where do you rank in your company, franchise…locally, internationally?  For how many years?
10. How many qualified buyers are you currently working with?  Do you have enough buyer leads to require full-time buyer showing agents?
11. What lead generation system(s) do you have to develop an inventory of buyers for your listings?  What are they?  Who manages them?
12. How many listings do you currently have?
13. What is the market trend now?
14. How strong is your name recognition in the market area?
15. Do you have a written marketing plan specifically designed to selling my home?
16. Where and how often will you advertise our home?  Would you provide us with professional full-color brochures of our home?  Will you provide Internet advertising?  How?
17. In what ways do you encourage other Realtors to sell my property?
18. If I give you the listing, what are the first seven things you will do to sell my property in the first week?
19. How will you let me know what you are doing to market my property?
20. Will you provide us with written activity reports of the showings and prospective buyer and Realtor comments?

If the Realtor you are interviewing falls short, can’t substantiate, or hedges in any way, you’re interviewing the wrong Realtor!

Make sure the Realtor can back up any and all statements. Take a “show me” attitude! Don’t be shy; this could be the most important business decision of your life.
Buying vs. Renting

Although some renters believe that renting is “maintenance free”, they are actually paying for maintenance in their rent – whether they need it or not. Renting offers you no equity, no tax benefit, and no protection against regular rent increases. If your paying rent, your really just paying someone else’s mortgage. Writing a check is just like watching your hard earned money sail away. Let’s compare*.

<table>
<thead>
<tr>
<th>Rent</th>
<th>vs.</th>
<th>Own</th>
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</thead>
<tbody>
<tr>
<td>Monthly Payment</td>
<td>Monthly Payment</td>
<td>$855</td>
</tr>
<tr>
<td>Insurance</td>
<td>Taxes</td>
<td>$260</td>
</tr>
<tr>
<td>Taxes</td>
<td>Insurance</td>
<td>$50</td>
</tr>
<tr>
<td></td>
<td>MIP Insurance</td>
<td>$45</td>
</tr>
<tr>
<td>Total Payment</td>
<td>Total Payment</td>
<td>$1,210</td>
</tr>
</tbody>
</table>

**Savings**

<table>
<thead>
<tr>
<th>Interest Deduction</th>
<th>Interest Deduction</th>
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<tbody>
<tr>
<td>$0</td>
<td>$175</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Tax Deduction</th>
<th>Tax Deduction</th>
</tr>
</thead>
<tbody>
<tr>
<td>$0</td>
<td>$75</td>
</tr>
</tbody>
</table>

Net Monthly Payment $1,030

Net Monthly Payment $960

* Approximate Payment/Cost Comparison based on estimated annual tax results. Based on 2.5 tax bracket and on estimated first year interest and taxes. Recommend consulting with tax expert. Payment based on FHA 30-year fixed rate loan with 7% interest rate, sales price of $125,000 and a loan balance of $121,250. Interest rate/rental rates, prices, terms, and availability subject to change without notice. See a qualified tax consultant for more details.
Buying a Home
Frequently Asked Questions

How do I choose a mortgage lender?

The [Click here and type your team name] can recommend several lenders who we have successfully worked with over the years. The lender will expedite all of the necessary paperwork and information, including ordering a credit report and appraisal of the property, if required.

The application normally takes about one hour. All parties who will be on the title as new owners should be present. The information you provide to the lender is confidential.

Do I need to bring anything with me when I am looking at homes?

Bring a notebook and pen for note taking. Don’t forget to bring along your Buyer Book as a reference guide when you are looking at homes. In the back of the book, we have included several sheets for the Notes on Viewed Properties. Feel free to use these to jot down key features of the houses we view. This will make it easier to remember the specifics about each home.

If you need to go back to a home for another look, just let us know, and we will happily schedule an appointment. And bring your checkbook so you can make an offer if we find a home you like.

When I start visiting homes, what should I be looking for the first time through?

The house you ultimately choose to call home will play a major role in your life. While it is true that a home can be an excellent investment, it must also fit the way you live. Your chief concern should be those things that you cannot change: location, floor plan, # of baths, lot size, etc. Then, consider those things that you can change – appliances, carpet, paint, cabinets, etc. – and whether or not you are willing to change them.

What key questions should I ask about each home?

Sellers will supply you with a Seller’s Disclosure for the home, which will disclose any defects known by the seller. But, be sure to ask any questions you have about the home, even if you feel you are being nosy. You have a right to know. Ask any questions you have. We will assist you in finding the answers to all of your questions and/or concerns.

How many homes should I look at before I buy?

We will be viewing homes that match the preferences you gave during the buyer consultation. As long as your preferences don’t change, you will only to have see an average of 6-8 homes before finding the one you want.
Where can I get information about local schools?

Ask us any questions you have about local schools. We stay as informed as possible about all of the local schools and can tell you where to find answers to any detailed questions you may have.

How can I find out what homes are selling for in a given neighborhood?

Home sales are a matter of public record. You can call the Recorder’s office, a local residential appraiser, or the public information department of the local Multiple Listing Service for information on recent sales history, average sales price, time on the market, and other listing information for sales in a given area. However, a better and easier way to get this information is to ask the [Click here and type your team name]. If you are interested in a particular home, we may be able to provide you with a list of comparables—sale prices of homes in the area that are roughly the same size and age as the home you are considering. This is a good way to evaluate the seller’s asking price.

How do I determine the amount of my initial offer?

Once you have examined the home’s features and looked at the comparables, you should have a good idea of what the home’s value is in the current market. Consider your financial situation, and make an offer that you consider to be fair. Your offer will include the amount you are willing to pay, financing terms, any personal property you wish to have included, loan commitment date, closing date, and other contingencies including inspections. Remember that the lower your offer is, the less likely the seller will be to accept, so avoid ‘low-balling’ if you really want the house.

Should I be present during the inspection?

It is not required, but it is very much to your advantage. You will be able to better understand the inspection report, and know exactly which areas need attention. Plus, you will have a chance to get answers to many of your questions, and receive a lot of general information that will help you when you move into your new home.
Step-By-Step Process
A successful real estate transaction hinges on numerous details involving deadlines that must be met so that you can move into your ideal home as soon as possible.

<table>
<thead>
<tr>
<th>TO DO:</th>
<th>DATE COMPLETED:</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓ Loan Application:</td>
<td></td>
</tr>
<tr>
<td>(Application fee is due at this time).</td>
<td></td>
</tr>
<tr>
<td>✓ Seller’s Disclosure must be signed:</td>
<td></td>
</tr>
<tr>
<td>✓ Set inspection date and time:</td>
<td></td>
</tr>
<tr>
<td>✓ Written notice due – all items from the inspection that you wish to be repaired:</td>
<td></td>
</tr>
<tr>
<td>✓ Negotiation of inspection repair items complete:</td>
<td></td>
</tr>
<tr>
<td>✓ Title Commitment due:</td>
<td></td>
</tr>
<tr>
<td>✓ Insurance: (You are required to arrange for insurance coverage and to inform your mortgage company of your agent’s name and phone number).</td>
<td></td>
</tr>
<tr>
<td>✓ Loan approval:</td>
<td></td>
</tr>
<tr>
<td>✓ Closing Date:</td>
<td></td>
</tr>
</tbody>
</table>

Please note: During the loan and home-buying process, you will be asked to supply documentation, respond to phone calls requesting information, schedule dates into your calendar, etc…
Moving Checklist

What to do Before you Move

☑ Two months before moving

☐ Sort through your belongings to reduce the number of things to move.
☐ Have a garage sale or donate items you no longer need.
☐ Decide whether to move yourself or hire professionals. Make reservations with a moving company or truck rental company. Tip: Call three companies for estimates to compare.
☐ Gather packing supplies: boxes, packing material, tape, felt markers, and scissors.
☐ If you’re moving a long distance, make travel arrangements with the airline, hotel, and rental car agency. If you’re driving to your new home, get maps and plan your travel route.
☐ Save all moving receipts. Some moving expenses are tax deductible. Check the current tax code for requirements.
☐ Place your legal, medical, financial, and insurance records in a safe and accessible place.
☐ Purchase insurance coverage for valuables to be moved.

☑ One month before moving

☐ Start packing items that aren’t regularly used such as off-season clothes and decorations and items in storage areas (garage, attic, and closets).
☐ Make travel arrangements for your pets.
☐ If you’re driving, get your car tuned up.
☐ Get medical records from your doctors, dentist, optometrist, and veterinarian.
☐ Send items (rugs, drapes, clothing, quilts, bedding) to the cleaners.
☐ Back up important computer files to floppy disk.

(Continued)
Moving Checklist (continued from previous page)

- **Two weeks before moving**
  - Contact your utility companies and notify them of your move.
  - Sign up for services at your new address.
  - Contact your long distance phone company and notify them of your move.
  - Call friends and family and recruit help for the moving day.
  - Confirm your travel reservations.
  - Arrange to close or transfer your bank account, if appropriate. Pick up items you’re
    your safety deposit box.

- **One week before moving**
  - Pick up items from the cleaners, repair shops, or friends.
  - Pack a survival kit of clothes, medicines, special foods, etc. to carry you through
    the day while you unpack.
  - Finish packing all boxes minus what you’ll need in the final week.
  - Inform the post office of your upcoming move.
  - Send change-of-address cards with your new address and phone number to:
    - Friends and family
    - Banks, insurance companies, credit card companies, and other financial institutions
    - Magazines and newspapers
    - Doctors, lawyers, accountants, realtors, and other service providers
    - State and federal tax authorities and any other government agencies as needed
    - Workplace, schools, and alma maters

- **The day before**
  - Set aside moving materials, such as tape measure, pocketknife, and rope.
  - Pad corners and stairways of house.
  - Lay down old sheets in the entry and hallways to protect floor coverings.
  - Remove hanging fixtures.
  - If you are moving yourself, pick up the rental truck and a dolly to move heavy
    boxes.
  - If you are driving, check oil, tire pressure, and gas in your car.
  - If you are flying, make sure you have tickets, charge cards and other essentials.

(Continued)
Moving Checklist (continued from previous page)

☑ Moving Day

*Carry with you:*
- The keys to your new home.
- A map of your new town and directions to your home.
- The telephone number of the moving company.
- Cash or traveler’s checks.
- Documentation related to the sale of your home.
- Your insurance policies and agent’s phone number.
- Your current address book or personal planner.
- Prescription and non-prescription medicines.
- Enough clothing to get by if the movers are late.
- Any items of great personal value to you that are virtually irreplaceable.
- Back-up copies of important computer files.
- Sheets, towels and personal hygiene items for the first night in your new home.

☑ Arrival Day

- Show movers where to place furniture and boxes.
- Check inventory to ensure that everything was delivered before signing delivery papers. Note any damages on the inventory sheet.
- Unpack any valuable items, such as silver, art, and jewelry, upon arrival.
- Inform the post office of your upcoming move.
Packing Checklist

Tips to make Your Move a Little Easier

☑ Packing Tips
  □ Gather boxes in all sizes from friends, neighbors, and stores
  □ Collect cushioning material such as bubble wrap, Styrofoam pellets, furniture pads, old blankets, plastic bags, tissue paper, newspapers, and small towels to sue as padding inside boxes.
  □ Create a “portable packing kit” with marking pens, a tape measure, packing tape, twine, and scissors. Carry it with you as you pack up items around your home.
  □ Reinforce the bottom of boxes with extra tape for added strength.
  □ Label each box with the name of the room in your home where it should be placed.
  □ Number the boxes and keep a list of which boxes goes in which room in your new home.
  □ Label boxes containing fragile items with large red lettering.
  □ Place china in plastic bags and stack plates upright on their sides, not flat.
  □ Pack your TV, stereo, and computer in their original boxes whenever possible.
  □ Keep boxes to 50 pounds or less.
  □ Pack heavy items into their own smaller boxes and place lighter items together into larger boxes. (Don’t pack all your books into one box!)
  □ Don’t move flammable, combustible, corrosive, or explosive items such as paint, gasoline, and ammunition.
  □ Pack a bag of personal items you’ll need during the move (change of clothes, toiletries, medicine, maps, food, and drinks). Keep it in an easy-to-find place when you pack.

(Continued)
Packing Checklist (continued from previous page)

PACKING LIST BY ROOM

☑️ Kitchen

☐ Cupboards
☐ Closets
☐ Drawers
☐ Box numbers for kitchen: _____________________________________________

☑️ Dining Room

☐ China cabinet or hutch
☐ Light fixture and lamps
☐ Furniture: table and chairs
☐ Box numbers for dining room: _________________________________________

☑️ Living Room

☐ Bookcases and contents
☐ Entertainment center and contents: stereo, TV, CDs, videotapes, and so on
☐ Knickknacks and artwork
☐ Lamps
☐ Furniture: couch, chairs, and tables
☐ Box numbers for living room: _________________________________________

☑️ Family Room

☐ Bookcases and contents
☐ Entertainment center and contents: stereo, TV, CDs, videotapes, and so on
☐ Knickknacks and artwork
☐ Lamps
☐ Furniture: couch, chairs, and tables
☐ Box numbers for family room: _________________________________________

(Continued)
Packing Checklist (continued from previous page)

☑ Master Bedroom

☐ Closets
☐ Dressers and contents
☐ Furniture: bed, dressers, night stands, and desk
☐ Box numbers for master bedroom: ________________________________

☑ Bedroom #1

☐ Closets
☐ Dressers and contents
☐ Furniture: bed, dressers, night stands, and desk
☐ Box numbers for bedroom #1: ________________________________

☑ Bedroom #2

☐ Closets
☐ Dressers and contents
☐ Furniture: bed, dressers, night stands, and desk
☐ Box numbers for bedroom #2: ________________________________

☑ Bedroom #3

☐ Closets
☐ Dressers and contents
☐ Furniture: bed, dressers, night stands, and desk
☐ Box numbers for bedroom #3: ________________________________

(Continued)
Packing Checklist (continued from previous page)

☑ **Study/Office**
- Computer equipment: CPU, monitor, and printer
- Desk and contents
- File cabinets and content
- Box numbers for study/office: ________________________________

☑ **Bathroom**
- Cupboards and contents
- Linens and towels
- Knickknacks and wall hangings
- Box numbers for bathroom: ________________________________

☑ **Attic**
- Trunks
- Boxes
- Box numbers for attic: ________________________________

☑ **Garage**
- Yard equipment and garden tools
- Home maintenance equipment and tools
- Box numbers for garage: ________________________________

☑ **Basement**
- Cupboards and shelves
- Box numbers for garage: ________________________________
Service Provider List

Provided for your convenience

Following is a list of recommended Service Providers. These are vendors we have worked with in the past and that have been recommended to us by satisfied customers. These are only recommendations. These recommendations are made on an informational basis only and are offered as a convenience to you. We accept no responsibility.

<table>
<thead>
<tr>
<th>UTILITIES:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ELECTRIC</strong></td>
</tr>
<tr>
<td>Company Name</td>
</tr>
<tr>
<td><strong>WATER &amp; SEWER</strong></td>
</tr>
<tr>
<td>Company Name</td>
</tr>
<tr>
<td><strong>GAS</strong></td>
</tr>
<tr>
<td>Company Name</td>
</tr>
<tr>
<td><strong>TRASH PICKUP</strong></td>
</tr>
<tr>
<td>Company Name</td>
</tr>
<tr>
<td><strong>TELEPHONE</strong></td>
</tr>
<tr>
<td>Company Name</td>
</tr>
<tr>
<td><strong>CABLE</strong></td>
</tr>
<tr>
<td>Company Name</td>
</tr>
</tbody>
</table>

| AIR CONDITIONING:        |
| Company Name             | Phone Number         |

| APPLIANCE REPAIR:        |
| Company Name             | Phone Number         |

| APPRAISER - COUNTY:      |
| Company Name             | Phone Number         |

| CABINETRY:               |
| Company Name             | Phone Number         |

| CARPET/VINYL/TILE:       |
| Company Name             | Phone Number         |

| CARPET CLEANING:         |
| Company Name             | Phone Number         |

<p>| CHIMNEY SWEEP:           |
| Company Name             | Phone Number         |</p>
<table>
<thead>
<tr>
<th>Service</th>
<th>Company Name</th>
<th>Phone Number</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>CONTRACTORS:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>ELECTRICIAN:</strong></td>
<td></td>
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<tr>
<td><strong>FLOORING:</strong></td>
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<tr>
<td><strong>FURNITURE REPAIR:</strong></td>
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<tr>
<td><strong>HANDYMAN SERVICES:</strong></td>
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<tr>
<td><strong>HAULING:</strong></td>
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<tr>
<td><strong>HOUSE CLEANING:</strong></td>
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<tr>
<td><strong>INTERIOR DECORATING:</strong></td>
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<td></td>
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<tr>
<td><strong>INSURANCE:</strong></td>
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<tr>
<td><strong>LAWN &amp; LANDSCAPE CARE:</strong></td>
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<td><strong>LOCKSMITH:</strong></td>
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<td><strong>MOVERS:</strong></td>
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<td><strong>PAINTERS:</strong></td>
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<td><strong>PLUMBERS:</strong></td>
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<tr>
<td><strong>POOL SERVICE:</strong></td>
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<tr>
<td><strong>PRESSURE CLEANING:</strong></td>
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<td></td>
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<tr>
<td></td>
<td>Company Name</td>
<td>Phone Number</td>
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<tr>
<td><strong>ROOFERS:</strong></td>
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<tr>
<td><strong>SCREENING:</strong></td>
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<tr>
<td><strong>SECURITY - HOME:</strong></td>
<td></td>
<td></td>
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<td></td>
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</tr>
<tr>
<td><strong>TERMITE/PEST COMPANIES:</strong></td>
<td></td>
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<tr>
<td><strong>TREE SERVICE:</strong></td>
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</tr>
<tr>
<td><strong>WINDOW REPAIR:</strong></td>
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</tr>
</tbody>
</table>
# Notes on Viewed Properties

**Property Address:** _____________________________________________________________

<table>
<thead>
<tr>
<th>PROPERTY</th>
<th>COMMENTS</th>
<th>EXTERIOR</th>
<th>COMMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓ View</td>
<td></td>
<td>✓ Foundation</td>
<td></td>
</tr>
<tr>
<td>✓ Lot Size</td>
<td></td>
<td>✓ Roof</td>
<td></td>
</tr>
<tr>
<td>✓ Landscaping</td>
<td></td>
<td>✓ Architectural Style</td>
<td></td>
</tr>
<tr>
<td>✓ Square Footage</td>
<td></td>
<td>✓ Deck/Patio</td>
<td></td>
</tr>
<tr>
<td>✓ Number of Bedrooms</td>
<td>✓ Swimming Pool</td>
<td>✓ Garage</td>
<td></td>
</tr>
<tr>
<td>✓ Number of Bathrooms</td>
<td>✓ General Exterior Condition</td>
<td></td>
<td></td>
</tr>
<tr>
<td>✓ Living Room</td>
<td></td>
<td>✓ Convenience to Work</td>
<td></td>
</tr>
<tr>
<td>✓ Kitchen</td>
<td></td>
<td>✓ Convenience to Shopping</td>
<td></td>
</tr>
<tr>
<td>✓ Dining Room</td>
<td></td>
<td>✓ Convenience to Schools</td>
<td></td>
</tr>
<tr>
<td>✓ Family Room</td>
<td></td>
<td>✓ Convenience to Day Care</td>
<td></td>
</tr>
<tr>
<td>✓ Study</td>
<td></td>
<td>✓ Nearby Recreational Facilities</td>
<td></td>
</tr>
<tr>
<td>✓ Fireplace(s)</td>
<td></td>
<td>✓ General Appearance of Houses in the Area</td>
<td></td>
</tr>
<tr>
<td>✓ Openness of Home</td>
<td></td>
<td>✓ House Value Relative to the Area</td>
<td></td>
</tr>
<tr>
<td>✓ General Interior Condition</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**ADDITIONAL COMMENTS**
# Homebuyer’s 10’s Sheet

**Client Name:**

**Property:**

## The Transaction

1. On a scale of 1-10, with 1 being not so desirable and 10 being extremely desirable, what one thing has to happen in this transaction for your experience to be a 10?

   ________________________________________________________________
   ________________________________________________________________
   ________________________________________________________________

2. What is important to you about that?

   ________________________________________________________________
   ________________________________________________________________
   ________________________________________________________________

3. If we could add just one more thing, what other thing has to happen to make your experience a 10+?

   ________________________________________________________________
   ________________________________________________________________
   ________________________________________________________________

4. What is important to you about that?

   ________________________________________________________________
   ________________________________________________________________
   ________________________________________________________________

5. If we could add just one more thing for this experience to be a 10++, what would it be?

   ________________________________________________________________
   ________________________________________________________________
   ________________________________________________________________

6. What is important to you about that?

   ________________________________________________________________
   ________________________________________________________________
   ________________________________________________________________

## The Home

7. What one thing does your home have to have/be for it to be a 10?

   ________________________________________________________________
   ________________________________________________________________
   ________________________________________________________________

8. What is important to you about that?

   ________________________________________________________________
   ________________________________________________________________
   ________________________________________________________________

9. Can you describe what that looks like?

   ________________________________________________________________
   ________________________________________________________________
   ________________________________________________________________

10. If we could add just one more thing to make it a 10+, what would it be?

    ________________________________________________________________
    ________________________________________________________________
    ________________________________________________________________

(continued on next page)
### The Home (continued)

11. What is important to you about that?
   
   
   
12. Can you describe what that looks like?
   
   
   
13. If we could add just one more thing to make it a 10++, what would it be?
   
   
   
14. What is important to you about that?
   
   
   
15. Can you describe what that looks like?
   
   
   
### Expectations

16. How does someone win with you?
   
   
   
17. How does someone lose with you?
   
   
   
18. What do you feel you have the right to expect from me as your Realtor?
   
   
   
19. What do you feel I have the right to expect from you as my client?
   
   
   

VIP Questionnaire

In order to better serve you, please complete and return this sheet with your listing paperwork. Thank you very much for the opportunity to serve you!

Your name: ____________________________________________________________
Spouse/Significant Other’s name: __________________________________________
Mailing address: ________________________________________________________
Physical address: _______________________________________________________
Phone numbers: _________________________________________________________
You  Home: ___________   Mobile: _________________
       Work: ___________   Fax: ____________________
Spouse/SO  Work: ___________   Fax: ____________________
Email address:  You: ______________________________________________
               Spouse/SO: ________________________________________

<table>
<thead>
<tr>
<th>SPECIAL DATES</th>
<th>Month</th>
<th>Day</th>
<th>Gender</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your birthday</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Spouse/SO birthday</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Child #1 birthday</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Child #2 birthday</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Child #3 birthday</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Child #4 birthday</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wedding Anniversary</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>FAVORITE THINGS</th>
<th>You</th>
<th>Spouse/Significant Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flower</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Color</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Restaurant</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Holiday</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sport/Hobby</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Please list any friends or family members who may be in need of assistance at this time:

________________________________________________________________________
________________________________________________________________________

Your Team’s Name
Keller Williams Realty
Address
Telephone Number
Website Address
Who Do You Call When . . .

Your home has been shown by a Realtor . . .
First call click here and insert main team telephone # anytime, day or night, to leave a message with your name and property address, followed by the name, company name, and phone # of the agent who showed your home. Then click here and type name and title of Listing Manager will contact the showing agent for feedback and pass along any comments to you!

You are going out of town . . .
Call click here and type name, title, and tel. # of Listing Manager. When you are going out of town, leave a message at this number with information on how to reach you.

Your supply of brochures or data sheets is low . . .
click here and type name, title, and tel. # of Listing Manager
When you are running low on brochures or need data sheets, please leave a message on our Listing Manager’s voice mail or the feedback hotline @ click here and type feedback telephone # or primary voice mail telephone # and we’ll deliver to you as soon as possible.

You have questions once your home is under contract . . .
The Closing Department - click here and type name, title, and tel. # of Transaction Coordinator.
Please call us in reference to contract questions, inspection reports, addenda, closing information, etc.

When Will We Call You??
Communication is KEY! We will call you click here and type your calling schedule for the Seller.
You can reach our team leader click here and type team leader name anytime at click here and type team leader telephone #.

[Click here and type your name]
Keller Williams Realty
[Click here and type your website]
Affiliated Business Arrangement Disclosure Statement

Notice to: ____________________________________________________________

Property Address: _____________________________________________________

Date: _______________

Keller Williams Realty and its associates have a business relationship through a partial ownership interest in [affiliated business name] and may receive a financial benefit as a result of transactions with said company.

Set forth below is the estimated charge or range of charges by [affiliated business name] for the following settlement services:

- Base Title Insurance Premium: $ ______
- Settlement Services: $ [enter rate/fee]
- (Credit $60.00 with prior policy) - $

$  

Your local representative will be most helpful in assisting you in determining which coverages are appropriate in your situation. You are not required to use [affiliated business name] as a condition for buying or selling this property. There are frequently other settlement service providers available with similar services. You are free to shop around to determine that you are receiving the best services and the best rate for these services.

I/We authorize Keller Williams Realty to order the necessary settlement services through [affiliated business name].

_________________________________________  _______________________________________
Seller                                        Seller

The cost involved for a purchaser is a $100.00 closing fee. If the purchaser is obtaining financing for the purchase, the cost of issuing a loan title policy, which will be required by the lender, will be between [fee range], depending on the loan type, in addition to any endorsements required by the lender.

_________________________________________  _______________________________________
Buyer                                        Buyer
## Seller Agent Questions Worksheet – Page 1

<table>
<thead>
<tr>
<th>Agent Name: ________________________________</th>
<th>Realty Company ____________________________</th>
</tr>
</thead>
<tbody>
<tr>
<td>Property Address</td>
<td>________________________________________________</td>
</tr>
</tbody>
</table>

### ABOUT THE PROPERTY

<table>
<thead>
<tr>
<th>1. Is the property still available?</th>
<th>Yes  No (if not, thank the agent and end phone call)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2. Do you have any offers working?</td>
<td>Yes  No</td>
</tr>
<tr>
<td>3. Have there been previous offers that did not work?</td>
<td>Yes  No</td>
</tr>
<tr>
<td>4. Why didn’t they work?</td>
<td>_______________________________________________</td>
</tr>
<tr>
<td>5. Is there anything not in the MLS or the disclosure of which I should be aware?</td>
<td>_______________________________________________</td>
</tr>
<tr>
<td>6. Have any major appliances or the roof been replaced recently?</td>
<td>_______________________________________________</td>
</tr>
<tr>
<td>7. Do you know the approximate ages? Check SPDS to avoid asking agent this question.</td>
<td>_______________________________________________</td>
</tr>
<tr>
<td>Appliances:</td>
<td>_______________________________________________</td>
</tr>
<tr>
<td>Roof:</td>
<td>_______________________________________________</td>
</tr>
<tr>
<td>Hot water heater:</td>
<td>_______________________________________________</td>
</tr>
<tr>
<td>HV/AC</td>
<td>_______________________________________________</td>
</tr>
<tr>
<td>8. Do you have septic/well certification?</td>
<td>_______________________________________________</td>
</tr>
<tr>
<td>Usually this must be done within &lt;x&gt; number of days of COE (lender/state requirement).</td>
<td>_______________________________________________</td>
</tr>
</tbody>
</table>

### ABOUT THE SELLER

| 1. Why is the seller moving? | _______________________________________________ |
| 2. What is the time-frame for vacating the property? | _______________________________________________ |
| 3. Is there any flexibility in that?* | _______________________________________________ |
|   * Explain benefits to Seller. Ask if they will consider a quick close and then a leaseback from the new buyer at the buyer’s PITI? | _______________________________________________ |
| 4. For how long? | _______________________________________________ |

### ABOUT THE CONTRACT

| 1. Do you have the Seller’s Disclosure? Would you fax it to me? | _______________________________________________ |
| 2. Are there any problems disclosed that you can explain? | _______________________________________________ |
| 3. Are the seller’s offering a home warranty? | _______________________________________________ |
| 4. How many points or how much in closing costs is the Seller prepared to pay? | _______________________________________________ |

* (continued on next page)
<table>
<thead>
<tr>
<th>ABOUT THE CONTRACT (Continued)</th>
</tr>
</thead>
<tbody>
<tr>
<td>5. Is there any flexibility in the price?</td>
</tr>
<tr>
<td>6. How can I reach you if I have an offer?</td>
</tr>
<tr>
<td>Cell: ________________________________</td>
</tr>
<tr>
<td>Pager: ________________________________</td>
</tr>
<tr>
<td>Home: ________________________________</td>
</tr>
<tr>
<td>7. What is your office mailing address that should be noted on the contract?</td>
</tr>
<tr>
<td>____________________________________</td>
</tr>
<tr>
<td>____________________________________</td>
</tr>
<tr>
<td>____________________________________</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>OTHER COMMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date: ___________ Telecom or interview between __________ &amp; __________</td>
</tr>
<tr>
<td>________________________________</td>
</tr>
</tbody>
</table>
Buyer Estimated Charges

<table>
<thead>
<tr>
<th>Buyer’s Name:</th>
<th>Property Address:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Selling Price:</td>
<td>Proposed Loan Amount:</td>
</tr>
<tr>
<td>Proposed Closing Date:</td>
<td>Prepared By:</td>
</tr>
</tbody>
</table>

**Lender Fees:**
- Loan Origination Fee $____
- Loan Discount $____
- Appraisal Fee $____
- Credit Report $____
- Application Fee $____
- Underwriting Fee $____
- Doc Prep Fee $____
- Tax Service Fee $____
- Flood Cert. Fee $____
- VA Funding Fee $____
- TOTAL LENDER FEES* $____

**Title Charges:**
- Closing Fee $____
- Mortgage Title Ins. & Endorsements $____
- Courier Fee $____

**Government Recording & Transfer Charges:**
- Recording Fees $____
- Doc Stamps – Mortgage $____
- Intangible Tax – Mortgage $____

**Additional Charges:**
- Keller Williams Processing Fee $____
- Survey $____
- Termite Inspection $____
- Home Inspection (paid at time of inspection) $____
- TOTAL CLOSING COSTS* $____

**Items Required by Lender to be Paid in Advance:**
- Interest ___ days @ $___/day $____
- Mortgage Insurance Premium $____
- Hazard Insurance Premium $____
- Flood Insurance $____

**Reserves Deposited with Lender:**
- Hazard Insurance (2 months) $____
- Mortgage Insurance (3 months) $____
- Property Taxes (3 months) $____
- Flood Insurance $____
- TOTAL PREPAIDS * $____

**Reserves Deposited with Lender:**
- Hazard Insurance (2 months) $____
- Mortgage Insurance (3 months) $____
- Property Taxes (3 months) $____
- Flood Insurance $____
- TOTAL PREPAIDS * $____

**Estimated Monthly Payments:**
- Principal and Interest $____
- Taxes $____
- Hazard/Flood Insurance $____
- Mortgage Insurance $____
- Estimate Monthly Mortgage Payment $____
- Maintenance Fees/Association Dues $____

I/We understand that the above closing costs and figures are estimated only and that the final costs and all prorations will be determined by the lending institution chosen by the Buyer. I/We further understand that Keller Williams Realty and their associates in no way warrant or guarantee any of the above estimated figures.

I/We have reviewed and signed for the above estimated expenses before any contract for sale of real estate has been signed.

Buyer Signature
Date

Buyer Signature
Date
Contract Checklist

Agent: ____________________________________________ Transaction: ____________________________________________

**Seller / Buyer Representation:**
- Our Client
- Buyer
- Seller

**Property Address:** ____________________________________________

(Number & street name) (city, state) (zip)

**Closing Date:** ____________

**Possession:** ____________

**Lender:** __________________

**Loan Application Made:** Yes No

**SELLER**

Name(s): ____________________________________________

Moving Plans: ____________________________________________

**BUYER**

Name(s): ____________________________________________

Moving Plans: ____________________________________________

**DOCUMENTS TO BE INCLUDED:**

- Signed and dated contract and addenda- Buyers, Sellers, and Agents
- Accepted offer returned to co-op agent
- Clients received copy of contract
- Disclosures (Radon, Lead Based Pain, HOA, etc.)
- Seller’s Disclosure Statement (signed and dated)
- Clients received copy of Seller Disclosure.
- Agency Disclosure (signed and dated)
- Buyer Representation Agreement
- Listing Agreement
- Escrow check made payable to closing company specified in the contract or copy of escrow check (if already receipted by Closing Co.)
- Option Fee Check given to co-op agent Option Fee Deadline: ____________________________
- Copy of Option Fee Check
- Pre-Qualification/Pre-Approval letter
- Conditional Loan Approval Letter
- MLS Full Listing
- Is there an MLS translate with contract (if not our listing- for commission split information)
- Public Record
- Disclosure statement (if you have an affiliated business arrangement with either Closing Company or Lender)
- Contract Worksheet
- Parties of the Sale form
- Buyer Estimated Charges
- Seller’s Estimated Closing Statement (Net Sheet)
- Title Insurance Policy
- Mortgage Information Request letter (Estoppel)

**SPECIAL INSTRUCTIONS FOR TRANSACTION COORDINATOR:**

Keller Williams Realty, Inc. © 2004
Extra Copies of Forms & Checklists
Buyer Interview

**Referral:** Yes  No  Referral source: ________________________________________________

Date: ___________________________  Name: __________________________________________

Home phone: _____________________  Work phone: ___________________________________

Cell phone: ______________________  Pager: __________________________________________

Fax: _____________________________  Email: __________________________________________

Best time to contact you: __________________________________________________________

Present address: _________________________________________________________________

City/State: ____________________________  Zip: _______________________________________

Own or Rent? _______  If you own, must you sell your home first? ________________

Relocating?  ☐ Yes  ☐ No  If so, where? ____________________________________________

**Currently working with an agent?**  ☐ Yes  ☐ No  If so, who? ____________________________

**Specific Needs/Wants:**

- **Bedrooms:**  1  2  3  4  5
- **Bathrooms:**  1  2  3  4
- **Living Rooms:**  1  2  3
- **Garage:**  1  2  3
- **Levels:**  1  2  3
- **Square ft.:** __________________________

- **Pool:**  ☐ Yes  ☐ No

- **Spa:**  ☐ Yes  ☐ No

- **Construction:** brick  stone  frame  block

- **Acreage:**  ☐ Yes  ☐ No  If so, size? __________________________

- **Central Air/Heat:**  ☐ Yes  ☐ No

- **Specific features (fireplace, etc):** ____________________________________________

- **Specific additions/area:** ___________________________________________________

- **Schools preferred:** _________________________________________________________

Price range: _________________________________________________________________

Payment Method:  ☐ Mortgage  ☐ Cash  ☐ Other: ______________________________________

Do you need a lender?  ☐ Yes  ☐ No  Name: ______________________________________

Phone: ________________________________________________________________

Payment range: _________  Down payment: _________

How soon do you need to be in the home? _______________________________________

**Buyer Consultation Appointment:**

- **Date:** ______________________________________

- **Time:** ________________

Keller Williams Realty, Inc. © 2004
## Buyer Log

<table>
<thead>
<tr>
<th>Time</th>
<th>Buyer Name</th>
<th>Property Called On</th>
<th>Phone</th>
<th>Source</th>
<th>Appt. Date</th>
<th>Appt. Time</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
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</tbody>
</table>
Buyer Appointment Checklist

Agent name: _____________________________  Time: ______________________________

Appt. date: ______________________________  Name: __________________________________

Consultation address (if not office):
Address: ________________________________
City, State, & Zip: _________________________
Phone: __________________________________
Price range: ______________________________
Source: __________________________________

Complete? | Activity (forms) | Assigned To
-----------|----------------|-------------------
☐          | Database Appointment |                   
☐          | Begin *Exceeding Buyer Expectations Checklist* |                   
☐          | *Buyer Consultation Packet Checklist* |                   
☐          | MLS Search Printout |                   
☐          | Driving Directions to Consultation address (if not office) |                   

Notes/Special Instructions:
_______________________________________________________________________________________
_______________________________________________________________________________________
_______________________________________________________________________________________
Exceeding Buyer Expectations Checklist

The *Exceeding Buyer Expectations Checklist* is designed to exceed all expectations of service any client might have.

<table>
<thead>
<tr>
<th>Complete?</th>
<th>When</th>
<th>What (examples)</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>☑️</td>
<td>Converting Buyer Leads</td>
<td>Hang <em>Welcome sign</em></td>
<td>For buyer consultation</td>
</tr>
<tr>
<td>☑️</td>
<td>Converting Buyer Leads</td>
<td>Logo Velour Bag with Chocolates</td>
<td>For buyer consultation</td>
</tr>
<tr>
<td>☑️</td>
<td>Converting Buyer Leads</td>
<td>Logo Tote Bag with Buyer’s Book</td>
<td>Given when buyer signs Buyer Representation Agreement</td>
</tr>
<tr>
<td>☑️</td>
<td>Servicing Buyers</td>
<td>Basket (fill with water, snacks, etc.)</td>
<td>Given before taking clients out on showings</td>
</tr>
<tr>
<td>☑️</td>
<td>Servicing Buyers</td>
<td>Logo Mug with Cookies</td>
<td>Delivered to the buyer’s workplace when offer goes under contract</td>
</tr>
<tr>
<td>☑️</td>
<td>Coordinating Buyer Transaction &amp; Closing</td>
<td>Movie Tickets</td>
<td>Given when all contingencies are removed</td>
</tr>
<tr>
<td>☑️</td>
<td>Coordinating Buyer Transaction &amp; Closing</td>
<td>T-shirts and Vinyl Envelope</td>
<td>Brought to closing table</td>
</tr>
<tr>
<td>☑️</td>
<td>Completing Post-Closing</td>
<td>Lunch</td>
<td>Delivered to buyer on moving day</td>
</tr>
</tbody>
</table>

*Always include two of your business cards when delivering items to the buyer.*
# Buyer Consultation Packet Checklist

Client Name: _________________________   Property: ____________________________________________

The *Buyer Consultation Packet* should contain the following:

<table>
<thead>
<tr>
<th>Complete?</th>
<th>Activity (forms)</th>
<th>Assigned To</th>
</tr>
</thead>
<tbody>
<tr>
<td>✗</td>
<td>Buyer Book (bound booklet with team name, contact information, and logo on cover)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- <em>Team Mission Statement</em></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- <em>Introduction to the Team</em></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Testimonials</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- <em>Getting to Know Your Realtor</em></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- <em>Buying vs. Renting</em></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- <em>Buying a Home (FAQ)</em></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- <em>Step by Step Process</em> (with space for Dates)*</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- <em>Moving Checklist</em></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- <em>Service Provider List</em></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- <em>Notes on Viewed Properties</em></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Business Cards (minimum of 2)</td>
<td></td>
</tr>
<tr>
<td>✗</td>
<td><em>Homebuyer’s 10’s Sheet</em></td>
<td></td>
</tr>
<tr>
<td>✗</td>
<td><em>VIP Questionnaire</em></td>
<td></td>
</tr>
<tr>
<td>✗</td>
<td><em>Who Do You Call When…</em></td>
<td></td>
</tr>
<tr>
<td>✗</td>
<td><em>Buyer Representation Agreement</em> (state specific)*</td>
<td></td>
</tr>
<tr>
<td>✗</td>
<td><em>Addendum to Buyer Representation Agreement</em> (state specific)*</td>
<td></td>
</tr>
<tr>
<td>✗</td>
<td><em>Agency Disclosure</em> (state specific)*</td>
<td></td>
</tr>
<tr>
<td>✗</td>
<td><em>Affiliated Business Arrangement Disclosure</em></td>
<td></td>
</tr>
<tr>
<td>✗</td>
<td>MLS Search Printout (printed from computer)*</td>
<td></td>
</tr>
</tbody>
</table>
# Homebuyer’s 10’s Sheet

**Client Name:**

**Property:**

## The Transaction

1. On a scale of 1-10, with 1 being not so desirable and 10 being extremely desirable, what one thing has to happen in this transaction for your experience to be a 10?

   

____________________________________________________________________________________________________

____________________________________________________________________________________________________

____________________________________________________________________________________________________

2. What is important to you about that?

   

____________________________________________________________________________________________________

____________________________________________________________________________________________________

3. If we could add just one more thing, what other thing has to happen to make your experience a 10+?

   

____________________________________________________________________________________________________

____________________________________________________________________________________________________

4. What is important to you about that?

   

____________________________________________________________________________________________________

____________________________________________________________________________________________________

5. If we could add just one more thing for this experience to be a 10++, what would it be?

   

____________________________________________________________________________________________________

____________________________________________________________________________________________________

6. What is important to you about that?

   

____________________________________________________________________________________________________

____________________________________________________________________________________________________

## The Home

7. What one thing does your home have to have/be for it to be a 10?

   

____________________________________________________________________________________________________

____________________________________________________________________________________________________

8. What is important to you about that?

   

____________________________________________________________________________________________________

____________________________________________________________________________________________________

9. Can you describe what that looks like?

   

____________________________________________________________________________________________________

____________________________________________________________________________________________________

10. If we could add just one more thing to make it a 10+, what would it be?

    

____________________________________________________________________________________________________

____________________________________________________________________________________________________

(continued on next page)
### The Home (continued)

11. What is important to you about that?

____________________________________________________________________________________________________
____________________________________________________________________________________________________
____________________________________________________________________________________________________

12. Can you describe what that looks like?

____________________________________________________________________________________________________
____________________________________________________________________________________________________
____________________________________________________________________________________________________

13. If we could add just one more thing to make it a 10++, what would it be?

____________________________________________________________________________________________________
____________________________________________________________________________________________________
____________________________________________________________________________________________________

14. What is important to you about that?

____________________________________________________________________________________________________
____________________________________________________________________________________________________
____________________________________________________________________________________________________

15. Can you describe what that looks like?

____________________________________________________________________________________________________
____________________________________________________________________________________________________
____________________________________________________________________________________________________

### Expectations

16. How does someone win with you?

____________________________________________________________________________________________________
____________________________________________________________________________________________________
____________________________________________________________________________________________________

17. How does someone lose with you?

____________________________________________________________________________________________________
____________________________________________________________________________________________________
____________________________________________________________________________________________________

18. What do you feel you have the right to expect from me as your Realtor?

____________________________________________________________________________________________________
____________________________________________________________________________________________________
____________________________________________________________________________________________________

19. What do you feel I have the right to expect from you as my client?

____________________________________________________________________________________________________
____________________________________________________________________________________________________
____________________________________________________________________________________________________
VIP Questionnaire

In order to better serve you, please complete and return this sheet with your listing paperwork. Thank you very much for the opportunity to serve you!

Your name: ____________________________________________________________
Spouse/Significant Other’s name: __________________________________________
Mailing address: ________________________________________________________
Physical address: _______________________________________________________
Phone numbers: ________________________________________________________
You Home: ___________ Mobile: ___________
Work: ___________ Fax: ___________
Spouse/SO Work: ___________ Fax: ___________
Email address: You: ______________________________________________
Spouse/SO: ________________________________________

<table>
<thead>
<tr>
<th>SPECIAL DATES</th>
<th>Month</th>
<th>Day</th>
<th>Gender</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your birthday</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Spouse/SO birthday</td>
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<tr>
<td>Child #1 birthday</td>
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<tr>
<td>Child #2 birthday</td>
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<tr>
<td>Child #3 birthday</td>
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<tr>
<td>Child #4 birthday</td>
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<tr>
<td>Wedding Anniversary</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>FAVORITE THINGS</th>
<th>You</th>
<th>Spouse/Significant Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flower</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Color</td>
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<tr>
<td>Restaurant</td>
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<tr>
<td>Holiday</td>
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<tr>
<td>Sport/Hobby</td>
<td></td>
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</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Please list any friends or family members who may be in need of assistance at this time:
____________________________________________________________________________________________
____________________________________________________________________________________________

Your Team’s Name
Keller Williams Realty
Address
Telephone Number
Website Address
Affiliated Business Arrangement Disclosure Statement

Notice to: ________________________________________________________________

Property Address: __________________________________________________________________

Date: _______________

Keller Williams Realty and its associates have a business relationship through a partial ownership interest in [affiliated business name] and may receive a financial benefit as a result of transactions with said company.

Set forth below is the estimated charge or range of charges by [affiliated business name] for the following settlement services:

Base Title Insurance Premium: $ ______
Settlement Services: $ [enter rate/fee]  
(Credit $60.00 with prior policy) - $ 

$  

Your local representative will be most helpful in assisting you in determining which coverages are appropriate in your situation. You are not required to use [affiliated business name] as a condition for buying or selling this property. There are frequently other settlement service providers available with similar services. You are free to shop around to determine that you are receiving the best services and the best rate for these services.

I/We authorize Keller Williams Realty to order the necessary settlement services through [affiliated business name].

__________________________________________  __________________________________________
Seller        Seller

The cost involved for a purchaser is a $100.00 closing fee. If the purchaser is obtaining financing for the purchase, the cost of issuing a loan title policy, which will be required by the lender, will be between [fee range], depending on the loan type, in addition to any endorsements required by the lender.

__________________________________________  __________________________________________
Buyer        Buyer
Seller Agent Questions Worksheet – Page 1

Agent Name: ________________________________    Realty Company _____________________________________
Property Address: ________________________________________________________________________________

ABOUT THE PROPERTY

1. Is the property still available? Yes No (if not, thank the agent and end phone call)
2. Do you have any offers working? Yes No
3. Have there been previous offers that did not work? Yes No
4. Why didn’t they work? ________________________________________________________________
5. Is there anything not in the MLS or the disclosure of which I should be aware? 

6. Have any major appliances or the roof been replaced recently?

7. Do you know the approximate ages? Check SPDS to avoid asking agent this question.
   - Appliances: ________________________________
   - Roof: ______________________________________
   - Hot water heater: ____________________________
   - HV/AC ______________________________________

8. Do you have septic/well certification? _____________________________________________________
   Usually this must be done within <x> number of days of COE (lender/state requirement).

ABOUT THE SELLER

1. Why is the seller moving? ________________________________________________________________
2. What is the time-frame for vacating the property? ____________________
3. Is there any flexibility in that?* _______________ ________________________________
   * Explain benefits to Seller. Ask if they will consider a quick close and then a leaseback 
   from the new buyer at the buyer’s PITI?
4. For how long? __________________________________________________________

ABOUT THE CONTRACT

1. Do you have the Seller’s Disclosure? Would you fax it to me? ______________________________
2. Are there any problems disclosed that you can explain? _________________________________

3. Are the seller’s offering a home warranty? ______________________________________________
4. How many points or how much in closing costs is the Seller prepared to pay? 

(continued on next page)
### Seller Agent Questions Worksheet – Page 2

**ABOUT THE CONTRACT (Continued)**

5. Is there any flexibility in the price? ___________________________________________

6. How can I reach you if I have an offer?
   - Cell: _______________________________
   - Pager: _______________________________
   - Home: _______________________________

7. What is your office mailing address that should be noted on the contract?
   - _______________________________
   - _______________________________
   - _______________________________

**OTHER COMMENTS**

Date: _______________  Telecom or interview between ____________ & ____________
## Buyer Estimated Charges

- **Buyer’s Name:**
- **Property Address:**
- **Selling Price:**
- **Proposed Closing Date:**
- **Proposed Loan Amount:**
- **Prepared By:**

### Lender Fees:
- **Loan Origination Fee** $_________
- **Loan Discount** $_________
- **Appraisal Fee** $_________
- **Credit Report** $_________
- **Application Fee** $_________
- **Underwriting Fee** $_________
- **Doc Prep Fee** $_________
- **Tax Service Fee** $_________
- **Flood Cert. Fee** $_________
- **VA Funding Fee** $_________


### Title Charges:
- **Closing Fee** $_________
- **Mortgage Title Ins. & Endorsements** $_________
- **Courier Fee** $_________

### Government Recording & Transfer Charges:
- **Recording Fees** $_________
- **Doc Stamps – Mortgage** $_________
- **Intangible Tax – Mortgage** $_________

### Additional Charges:
- **Keller Williams Processing Fee** $_________
- **Survey** $_________
- **Termite Inspection** $_________
- **Home Inspection (paid at time of inspection)** $_________
- **TOTAL CLOSING COSTS** $_________
- **DOWN PAYMENT** $_________

### Items Required by Lender to be Paid in Advance:
- **Interest ___ days @ $___/day** $_________
- **Mortgage Insurance Premium** $_________
- **Hazard Insurance Premium** $_________
- **Flood Insurance** $_________

### Reserves Deposited with Lender:
- **Hazard Insurance (2 months)** $_________
- **Mortgage Insurance (3 months)** $_________
- **Property Taxes (3 months)** $_________
- **Flood Insurance** $_________

### Estimated Monthly Payments:
- **Rate** _________  **Term** _________
- **Principal and Interest** $_________
- **Taxes** $_________
- **Hazard/Flood Insurance** $_________
- **Mortgage Insurance** $_________
- **Total Monthly Mortgage Payment** $_________
- **Maintenance Fees/Association Dues** $_________

I/We understand that the above closing costs and figures are estimated only and that the final costs and all prorations will be determined by the lending institution chosen by the Buyer. I/We further understand that Keller Williams Realty and their associates in no way warrant or guarantee any of the above estimated figures.

I/We have reviewed and signed for the above estimated expenses before any contract for sale of real estate has been signed.

---

**Buyer Signature**

**Date**

---

**Buyer Signature**

**Date**
Contract Checklist

Agent: ____________________________________  Transaction: ________________________________  Seller / Buyer

Representation:  Our Client ☐ Buyer ☐ Seller  ☐ Res.  ☐ Condo  ☐ Resale  ☐ New Construction

Property Address: ____________________________  Sales Price: $____________

(# & street name)  (city, state)  (zip)

Closing Date: __________  Possession: ______________  Lender: ____________________

Loan Application Made ☐ Yes ☐ No

SELLER

Name(s): ___________________________________

Moving Plans: ___________________________________

BUYER

Name(s): ___________________________________

Moving Plans: ___________________________________

DOCUMENTS TO BE INCLUDED:

☐ Signed and dated contract and addenda- Buyers, Sellers, and Agents
☐ Accepted offer returned to co-op agent
☐ Clients received copy of contract
☐ Disclosures (Radon, Lead Based Pain, HOA, etc.)
☐ Seller’s Disclosure Statement (signed and dated)
☐ Clients received copy of Seller Disclosure.
☐ Agency Disclosure (signed and dated)
☐ Buyer Representation Agreement  ☐ Listing Agreement
☐ Escrow check made payable to closing company specified in the contract or copy of escrow check (if already receipted by Closing Co.)
☐ Option Fee Check given to co-op agent  Option Fee Deadline: ____________________________  ☐ Copy of Option Fee Check
☐ Pre-Qualification/Pre-Approval letter
☐ Conditional Loan Approval Letter
☐ MLS Full Listing
☐ Is there an MLS translate with contract (if not our listing- for commission split information)
☐ Public Record
☐ Disclosure statement (if you have an affiliated business arrangement with either Closing Company or Lender)
☐ Contract Worksheet
☐ Parties of the Sale form
☐ Buyer Estimated Charges  ☐ Seller’s Estimated Closing Statement (Net Sheet)
☐ Title Insurance Policy
☐ Mortgage Information Request letter (Estoppel)

SPECIAL INSTRUCTIONS FOR TRANSACTION COORDINATOR: