

## 1: Call & Speak w/Seller

Call the seller & have seller info sheet out. Ask seller the appx. loan balance left on the home. Any improvements in the past 5 yrs? Any special characteristics like large lot, view, orientation, RV parking, etc. Set up an appointment to meet after this phone conversation.

## 2: Pull Tax Records

Pull up tax record and print two. One for you and one for the seller(s).

## 3: Pull Comps

Pull comps. Area search is most effective in tract homes, custom built may need to go further. Active, pending, sold for the past 90 days. Analyze the competition on the market, the active listings. We do not price based on active's but what buyers are comparing to is important to know. Remember active's have not sold yet & their prices mean nothing. Pending's: since the amount accepted is not public until it closes, it's hard to "know" what the actual numbers are; But their listing prices & time on market can be a great tool in knowing what is working as they are pending. Sold's: these are your best comps & what an appraiser focuses on the most. Look at the price per square foot, days on the market, homes that are most similar to the subject property. Be careful not to base just on price per square foot. Remember larger homes tend to have lower price per square footage. Smaller homes tend to have higher price per square footage. Factors that adjust these numbers are lot size, view, upgrades, location, etc. Adjust based on subject property. Most sellers will say they have done many upgrades, but not all upgrades are valuable to a buyer or the bottom line of the market. I usually choose a low number if it is a fixer upper and a high number if it is a higher end upgrade before I see the property. Once I see the home I know where it should list based on my estimated high and low number.

## 4: Comps

Once the best active, pending, sold comps are selected, I plug them into a CMA program to review in the presentation with the sellers. I also print 2 one line CMA sheets.

## 5: Marketing Presentation

Prep your marketing presentation. If you have completed the coaching program & followed it, you should already have this complete.

## 6: Prepare Net Sheet

Prepare a Net Sheet using Tigor 3.0

Be sure to use sellers appx. loan balance & you can get their actual annual property tax number from the tax record.

## 7: Print

Print two blank listing agreements(RLA), AD-11 (TA: trust advisory & RCSD if in trust), TDS, SPQ, Tigor Statement of Information (SOI), Tigor Pre escrow docs. Print 1 of each except RLA

## 8: Seller Package

Put together a nice folder for the seller with all necessary paperwork.

- Tax Record
- Net Sheet
- Any Stats about their market
- Comps
- Any promotional material about yourself
- Business Card
- Copy of RLA, TDS, SPQ, AD-11, SOI, Tigor docs

## 9: Information to Leave

We always leave seller with the listing agreement (RLA) so they have time to review it if they are not ready to list at the time of appointment. Also, inform seller that their only upfront fees are termite report & HOA docs. We like to get pre-escrow started at least 5 days before list date.

## 10: Agent Package

Your folder will have: Tax sheet, net sheet, one line comps report

### Preparing for a Listing Appt.

#### Agent's Folder/Package

- Tax Record
- Old MLS listing sheet
- One line CMA
- Net Sheet
- RLA

#### Seller's Folder/Package

- Tax Record
- Old MLS listing sheet
- One line CMA
- Net Sheet
- Seller's Homework

### HOMEWORK

- RLA
- TDS
- SPQ
- Tigor's SOI
- Tigor Pre-escrow docs