

# Buyer Management Checklist



Buyer (1) Name: \_\_\_\_\_

Buyer (1) eMail: \_\_\_\_\_

Buyer (1) Cell Phone: \_\_\_\_\_

Buyer (2) Name: \_\_\_\_\_

Buyer (2) eMail: \_\_\_\_\_

Buyer (2) Cell Phone: \_\_\_\_\_

**At First Meeting**

- Exclusive Buyer Agency Agreement
- Company Disclosure
- Wire Fraud Disclosure
- All Buyer Consumer Brochures
- Mortgage Preapproved with: \_\_\_\_\_
- Loan Officer: \_\_\_\_\_ Phone: \_\_\_\_\_
- Add to CRM
- Add Buyers to Search Portal of Choice: \_\_\_\_\_
- Add appFiles Checklist and Submit Documents

- Add to Move Easy
- Broker Letter Sent (3 days from 1<sup>st</sup> meeting)

**After Closing**

- Change Status in CRM to Appropriate Client Category
- Add to "Stay-In-Touch" Program (\$25)
- Add to Marketing dataBase
- Broker Closing Letter Sent