

YOUR NAME: _____ **OFFICE:** _____
TIMEFRAME: _____ **TODAY'S DATE:** _____ **SOURCE OF LEAD:** _____
IF REFERRAL, REFERRAL TO: _____ **REFERRAL FROM:** _____
BUYER'S FIRST NAME: _____ **BUYER'S LAST NAME:** _____
ADDRESS: _____ **CITY:** _____ **STATE/ZIP:** _____
CHILDREN: _____

HOME #: _____ **OFFICE #:** _____ **CELL #:** _____
HOME #: _____ **OFFICE #:** _____ **CELL#:** _____
E-MAIL: _____
PRE-QUALIFIED **PRE-APPROVED** **FINANCE CO.** _____
LOAN OFFICER: _____ **PHONE #:** _____
PRICE RANGE: _____ **DOWN PAYMENT:** _____
SELLER'S ATTORNEY: _____ **BUYER'S ATTORNEY:** _____
PHONE: _____ **PHONE:** _____
FAX: _____ **FAX:** _____
ADDRESS: _____ **ADDRESS:** _____

WEICHERT GOLD SERVICES **WEICHERT FINANCIAL SERVICES** **WEICHERT INSURANCE**
WEICHERT WORKFORCE MOBILITY **WEICHERT TITLE** **WEICHERT HOME PROTECTION**
STYLE OF HOME: _____ **BRS:** _____ **BATHS:** _____
WANTS: _____ **NEEDS:** _____

YOU ARE REQUIRED BY LAW TO TRACK ALL PROPERTIES SHOWN OR DISCUSSED

DATE	MLS#/ADDRESS

AGENCY AGREEMENT SIGNED



SALES FOLLOW-UP CHECKLIST

REPORTING PROCESS

- Complete "Contract of Sale" or Binder: _____, have all parties sign and attach deposit check (if applicable): _____, give to processing manager: _____
- Fill out "Report of Sale" Worksheet
- Complete "Client Follow-Up" form
- Fax copy of fully executed contract to buyer's attorney with seller's attorney name: _____, refer to Weichert Title if applicable: _____
- Give 2 original contracts to buyer (keep 1 for your office file)
- Make neighborhood calls informing public of sale

SALES PROCEDURE

- Obtain comparables for appraiser and a copy of the listing
- Obtain copy of: Deed: _____, Survey: _____, Title Policy: _____ for the attorney; Delivered? Y N
- Obtain Seller's Disclosure and Lead Paint Disclosure forms from seller, have buyer sign, give to Processing Manager
- Refer buyer to Weichert Financial Services
- Refer buyer to Weichert Insurance Agency (homeowner's policy)
- Note in Contact Management System when deposit balance is due from buyer
- Note in Contact Management System when mortgage commitment is due
- Meet with bank appraiser
- Meet with Home Inspectors for: Radon: _____, Lead paint: _____, Termite: _____, Physical: _____, Well: _____, Septic: _____
- Mortgage Commitment letter received
- Status Report to Relocation/Referring Associate
- Obtain seller's forwarding address: _____; inform Processing Manager: _____

AFTER CONTINGENCIES MET

- Send "Just Sold" postcards to neighborhood
- Fax commission statement to both attorneys: _____; confirm closing date: _____
- Arrange for utility readings: water: _____, electric: _____, gas/oil: _____, misc. _____

PRE-CLOSING PREPARATION

- "Certificate of Occupancy" and/or Fire Inspection and /or Carbon Monoxide Inspection
- All Inspections completed
- Arrange closing with attorney or title company: _____; inform Processing Manager: _____
- Check status of funds for closing (cash/cert./treas)
- Take file and escrow monies to closing (if applicable)

AFTER CLOSING

- Collect HUD 1 statement: _____, commission check: _____, and Home Warranty check: _____
- Note in Contact Management System to visit (1 wk., 1mo., 3mo., 6mo.)
- Prepare file for final approval
- Send purchaser a "Thank You" note
- Send "Thank You" note to cooperating broker
- Make neighborhood calls to notify "sold" status
- Confirm MLS update
- Put buyer's information into "Pure Gold" section of your Contact Management System



LISTING AGENT INFO

Listing Agent: _____ Office: _____ Office Phone: _____
Cell Phone: _____ E-Mail: _____
Address of Property Marketed: _____
