

Listing Meeting Folder

use a multi-pocket folder

Pocket #1

☐ IABS Form

Make sure to hand this to the seller(s). Agents have been fined for not doing so.

☐ Seller Information Sheet

If you recommend a title company that sends a Seller's Information Sheet, once a property goes under contract, go ahead and have them complete. One less thing to worry about later.

☐ Tax Printout

Print the data sheet using Realist Tax. Highlight the homeowner name(s) to make sure the spelling is correct and confirm there are no other parties involved.

This is a great time to ask them if they have additional liens on the property (i.e. swimming pool, HVAC, roofer). Sometimes sellers don't think about this and they get to closing expecting a much higher net.

Pocket #2

☐ CMA or Recent Area Sales Data

Some people like beautiful charts and graphs and others just want the raw data.

I usually ask them which they prefer.

☐ ShowingTime Activity Report

Go to ShowingTime and click on Reports on the left

☐ Net Sheet

I would ask them ahead of time how much they pay in tax each year. You need to account for their homestead exemption.

Highlight the estimated sales price

Pocket #3

☐ Estimated Timeline for Listing Prep

<https://drive.google.com/file/d/19WP52wvaVcKhZVcOVLlutaqVzQOUV3zd/view?usp=sharing>

☐ Estimated Timeline for Contract to Close

Pocket #4

☐ Listing and Marketing Packet

☐ Resume

https://drive.google.com/file/d/1Ec9UYIGS8RwbawhVtbQdG3L_xslD36o/view?usp=sharing

Pocket #5

- ☐ Place a Sticky Note on Pocket "Is there an available survey"
- ☐ Listing Agreement

Pocket #6

- ☐ List of Repairs and Upgrades
<https://drive.google.com/file/d/1R57zU4WxkCyXWtf2G4xoTP4h845sDdm7/view?usp=sharing>
- ☐ Additional Property Information
https://drive.google.com/file/d/1nUuEdS_mPv2CwRk38EFGF-tgG83l2R1c/view?usp=sharing
- ☐ Listing Meeting Notes
https://drive.google.com/file/d/1H8UffRtiz6ZUTUS6OxVEh2beX976lY_5/view?usp=sharing
- ☐ Different Types of Property Showings
- ☐ Seller's Disclosure
- ☐ T-47 Affidavit

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