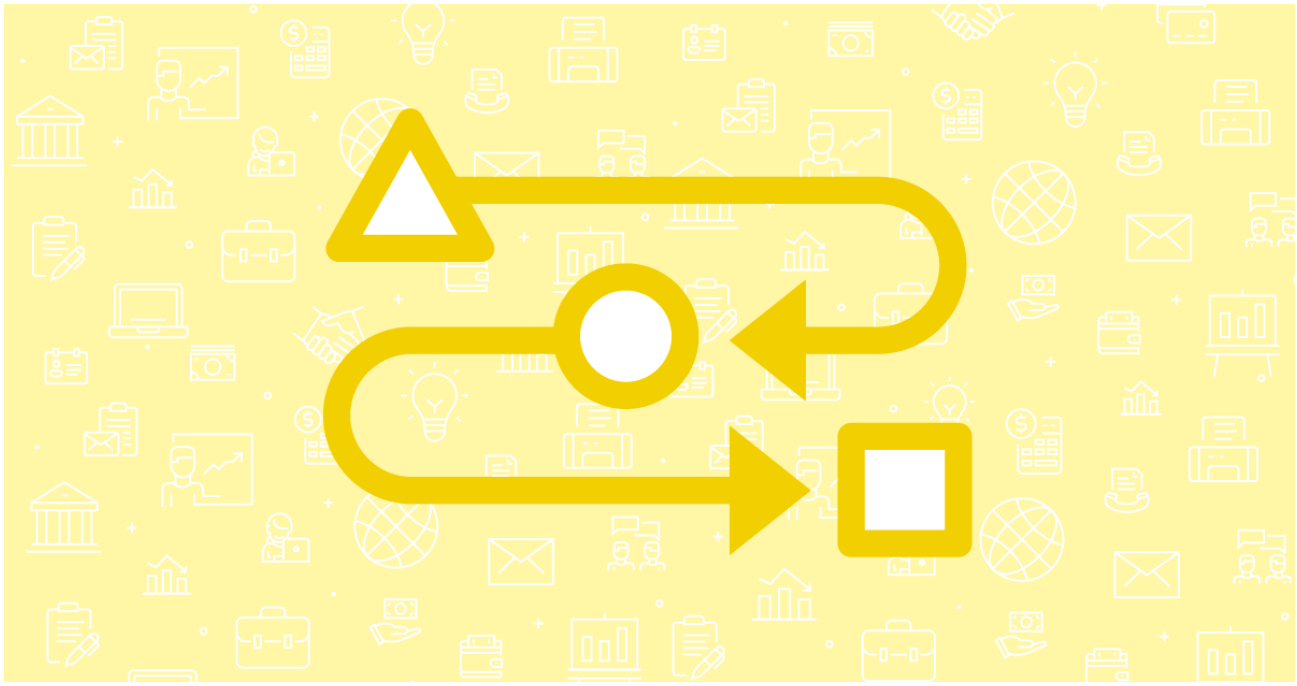
Onboarding Checklist: Real Estate Client (Buyer)

Use this real estate client information onboarding checklist to make sure your new client's needs can be met, understood, and obtained.



GATHER CONTACT INFORMATION/FIRST STEPS

- [ ] Name
  - Name:
  - Address:
  - Email:
  - Phone:
- [ ] Address
- [ ] Best contact information
- [ ] Create welcome packet
- [ ] Send out welcome packet and necessary documents
- [ ] Ask for a pre-approval letter (if needed)
- [ ] Recieve pre-approval letter (if needed)

GENERAL BUYER QUESTIONS TO ASK BUYER

- [ ] Are you selling a property as part of this process?
- [ ] Do you currently rent or own?
- [ ] Are there any additional buyers?
- [ ] When would you like to move?

- [ ] Area interested in?
- [ ] Style of home?
- [ ] Price range?
- [ ] Number of bedrooms?
- [ ] Number of bathrooms?
- [ ] Square feet?
- [ ] Wish list items?
- [ ] Absolute nos?

NEXT STEPS

- [ ] Research MLS
- [ ] Research private listings
- [ ] Create an email with potential homes (make sure homes meet criteria and wish list items)
- [ ] Send an email with potential homes
- [ ] Ask for feedback
- [ ] Set up showings
- [ ] Attend open houses
- [ ] Regroup after each showing
- [ ] Search MLS for additional listings

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