

# Ready to Sell?



**JEFF TAYLOR**  
REAL ESTATE GROUP

**COLDWELL BANKER REALTY INTOWN OFFICE**

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**WE OWN ... LIVE ... SELL ... HERE**









# Let's get to work selling your house!

**Here's a guide book to help you prepare.**

**2.84** **Agents**  
per 1,000 residents  
(one of the highest ratios in the U.S.)

## Let's discuss:

- Why are you selling?
- Where are you planning to go? And, by when?
- Do you have a price in mind?
- How did you arrive at that price?
- Do you need the proceeds from this sale to purchase your next home?
- What do you need most from my team?
- Is there anyone else we need to include in discussions about selling your home?

It's true: the Atlanta metro area has *a lot of real estate agents*.

That's why we do everything in our power to ensure you are pleased with our services while selling your home.

It takes a great deal of time and effort to sell a house, because your home is in competition with many others due to the aggressive market we currently live in. To sell your home, it needs to stand out – for all the right reasons and we can make that happen.

We thrive on competition, and we have everything in place to win. For starters, we have a background in marketing, customer service, and sales so we are eager to roll up our sleeves and help you get your house ready for a potential buyer. The right buyer. Your buyer.

You will work with a qualified and effective team: multiple buyer/seller specialists, full-time transaction coordinator, administrative and marketing support.

## As your selling team, we'll do the following – and more – to get you where you want to be:

- Price your home correctly to sell (without giving it away)
- Enhance the real and perceived value of your home so you get as much for it as you can
- Market your house in clever and effective ways (that some agents don't even know about)



- Keep you informed along the way, so you maintain realistic expectations and stay ready – even excited! – about the next steps in the process
- Help you avoid unwanted surprises at the closing table, so your sale is successful

## Are you ready to get started?





# About me and the Jeff Taylor Real Estate Group.

**Most real estate agents close  
an average of six to nine  
properties per year.**

2019	2020
<b>65</b>	<b>74</b>
CLOSED	CLOSED

Since becoming a REALTOR®, I have focused on building my techniques, knowledge base and other resources so that I can assist my clients achieve their goals with less stress and optimum results.

My work is my passion, my team and I are dedicated, to ensure your home sale is such a positive experience that you never hesitate to contact us again in the future for your own needs or recommend us, to others your friends and family.

## Jeff Taylor REALTOR®

**My goal is** to make a big and positive difference during the process of selling your home – whether it's your first sale or one of many – by using the skills I've accumulated after a long, successful career in the corporate world.

I began my career in real estate with that a vast professional experience, plus a degree in marketing and REALTOR® certification. I'm also a featured Zillow Premier Agent and Partner with RedFin and Realtor. I'm proud to have consistently by far, surpassed the average sales counts every year in our office. In fact, for the past three years my team has been one of the KW agency's top three teams. For 2020 we were awarded No. 1 for Team Units and No. 2 for Team Volume.

My past clients consistently refer me to their friends and family members once I find them the perfect home for their budget and lifestyle. They feel they worked with someone they could trust and had their best interest through the entire process.

### ***Obviously, something's working!***

I differ from other real estate agents in several ways. First, I've lived in Atlanta and the Decatur area, so I know the market I represent on your behalf. I also work with the latest Internet tools and promote your home to get it sold. I'm a hands-on agent, meaning I don't leave the details for others to handle but work with you



one-on-one. And, finally, I'm a great listener; I won't assume to know what you want but will hear you out.

I like fostering a mutual sense of purpose with my clients so we're working together in a smooth selling process – with as little stress as we can get away with during the journey.

Selling your home is a big deal. My team and I will do our best to make it as pleasant and rewarding for you as possible.



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## Meet the rest of the team.

### Realtors



**Michael Cocks**  
**REALTOR®**

Michael Cocks knows that home ownership is a big piece of the American dream, so that's why his goal is to use all the tools and skills he amassed during his corporate and non-profit work experiences – some 20 years of it – to help clients find and negotiate for their dream home. He brings an associate degree in business administration to the task, as well as some great listening skills and a true desire to help his clients achieve their goals. After all, their success = his success. A native of Los Angeles, Michael is now fully immersed in the Atlanta market and the collaborative process needed to work together with his clients to make the home buying or selling process as pleasant and rewarding as possible.



**Monica Spiro**  
**REALTOR®**

Making people smile makes Monica Spiro happy, so she decided to pursue a career in real estate. Like others on Jeff's team, she brings a background in customer service and a real desire to help people find the home of their dreams. After all, that's what being in real estate is all about – making people happy to find that home they've been looking for. She likes meeting new people every day and understands thoroughly that the process of buying a home is a collaborative and transparent process, and that each client and every transaction is unique. Monica considers it a privilege to be able to advocate for her clients and help them with their home ownership, from the first-time buyer to the client buying one of many homes on life's journey.



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## Meet the rest of the team.

### Realtors



### Andre Liscinsky REALTOR®

Andre Liscinsky's passion for Atlanta's mix of mid-century and modern architecture attracted him to the area, as did his 10 years of customer-service experience and a reputation for honesty, trustworthiness, and superior communication skills. Originally from Trumbull, Connecticut, Andre moved here after earning a bachelor's degree in business management from Pace University, where he enjoyed more than a passing fancy in baseball. Outside of building real estate relationships, Andre still enjoys baseball as a kids' coach as well as fitness, exploring the outdoors, and spending time with his family.





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## Meet the rest of the team.

### Operations



#### **Marianela Ortiz-Moskovitch**

##### **Executive Assistant**

A native of Caracas, Venezuela, who grew up in Massachusetts, Marianela Ortiz-Moskovitch is now a true Atlantan who shows Southern hospitality to every client she interacts with – in English or Spanish – on behalf of Jeff's team. A quality "product" is what she is focused on delivering, a trait that's been honed over years of work in life- and health-insurance sales as well as in her role as a national operations director in the field of workers' compensation. Like others on Jeff's team, Marianela likes helping others achieve their goals. When it's her time, however, to focus on herself, you'll find her traveling, riding motorcycles with her family, or crafting.



#### **Tammie Olinde**

##### **Transaction & Listing Manager**

Ushering contracts to the closing table and marketing properties efficiently, effectively, and compliantly are the main goals for Tammie and her team. By implementing best practices, fostering a collaborative environment, and developing each team member's individual growth, Tammie taps into her passion for delivering a great client experience. Getting a 5-star review from buyers and sellers is the best way to end the workday for Tammie. In her personal time, when Tammie's not chauffeuring her three kids around town, you can often find her enjoying a movie and extra-large popcorn at home with her husband.

# Meet the rest of the team.

## Operations



**Erica Wagner**  
**Transaction Coordinator**

Erica Wagner is the transaction coordinator for Jeff's team, and that's a big responsibility she takes seriously. She brings to the task more than 15 years of customer-service experience in various fields, as well as a year of experience with Atlanta Contracts, also as a transaction coordinator. A native of Tokyo, Erica has a degree in art education from Georgia State University and enjoys hiking, cooking, and painting. When you meet her, ask her about her other hobby: fire spinning.



**Shirlyn Englisby**  
**Listing Coordinator**

After raising two beautiful daughters and then working in the wholesale and retail gift industries, Shirlyn Englisby decided to apply her customer-service expertise to the real estate industry. She got her license as a REALTOR® in 2013 and has been working behind the scenes ever since to make things happen for clients. In her off-time, she enjoys playing pickleball, kayaking, hiking, dancing, baking, and cheering on the Georgia "Bulldawgs" during football season. Her favorite pastime, however, is being "Shugie" to her five adorable grandchildren.



# About our track record.

## Following are some of our real estate sales credentials:

Number of homes sold in recent years (industry average is 6-9/year):

- 2019: 65
- 2020: 74

Average number of days on market for listings (industry average is 74):

- Fewer than 40

Average listing price-to-sales-price ratio (industry average is 93%):

- 98%

Rankings and awards:

- Degreed sales & marketing professional
- Licensed Realtor®
- Zillow® Premier Agent
- Keller Williams Realty Metro Atlanta top 3% of agents
- Keller Williams Realty Metro Atlanta #1 team in 2020
- Homesnap's 2021 Top 5% Award





## Here is what our clients say.

### Three things I already know about selling your house:

- 1.** You want to end up with the most money you can possibly get from it.  
**Solution:** *We'll help you enhance your home's real and perceived value while minimizing your upfront costs.*
- 2.** You want the timing of the sale to be on your terms.  
**Solution:** *We'll work patiently but deliberately at winning what really amounts to a numbers game.*
- 3.** You want the process of selling it to be as easy as possible.  
**Solution:** *We'll approach your house as if it's the only one we have listed. We'll make it presentable and promote it.*

[www.zillow.com/profile/jefftaylor013](https://www.zillow.com/profile/jefftaylor013)



"I knew from the first time we talked on the phone that I would be in great hands with Michael. He was super friendly, knowledgeable, patient, and accommodating. My husband and I were moving from out of state, so it was quite a process to make it all happen within a few months' time. Michael never hesitated to make himself available, gave us lots of helpful tips, and encouraged us to keep moving forward if we got overwhelmed. We ended up finding the home of our dreams – it had everything on our wish list and more! This process would not have been nearly as smooth (or fun!) without him. We cannot recommend him enough and hope that you will be as lucky as we were to work with him. A million thanks, Michael!!!"

S. Bosch



"Working with Jeff was a great experience. He was always responsive and made sure that we were looked after even when he was out town. He gave good advice and helped us to understand the real value of our house and negotiate a complicated process all the way through closing. I highly recommend him."

T. Mounts



"We have now bought two homes with Jeff's help and in the process of selling another. He has been incredible with his knowledge of the market but also his kindness and going beyond what is expected. His care and concern throughout the entire process is a '10' and we will always strongly recommend working with Jeff. Our first call with any future sales or purchases will be to Jeff Taylor. Thanks for being so AWESOME!!!!!"

Zillow user\_10380



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## Here is what our clients say.



"My wife and I met Jeff via Zillow when we were looking to rent a house. Atlanta is very volatile in terms of renting, so speed and honesty are critical. He and his team were thorough, were very quick in showing us the property, and with all our answers; also, they were upfront with expectations from the owner of the house to ensure no misunderstanding down the line. After our rental, he and his team also helped us buy our own house. Our house was a new-construction, and we were first-time homeowners. Jeff was very helpful in educating us with all the details and ensuring that we got the best deal out of the contract with the builder."

TheBurrow18



"When the home of our dreams went up for sale, we worried that we wouldn't be able to act fast enough to get the house. We hadn't prepped our home to sell, we hadn't gotten pre-approved for a loan, and we didn't have a realtor. A family member referred us to Jeff, and it was the best referral ever! Jeff Taylor was fast-acting and masterful with making the offer and negotiating. We got the new house and quickly sold our house. I'd definitely recommend working with Jeff."

audreyprice0527



"Jeff's quality of care throughout the real estate process was outstanding. His very trustworthy way of interacting that I personally experienced was excellent. And his respectful welcoming ways toward others that we met throughout my search for a new home were sincere and seemed to put others at ease also. It was remarkable. I am most grateful. Jeff knew well the real estate market and made sure I saw a diversity of potential places so I could wisely make a final choice for what fit for me. Jeff's KW staff were helpful and timely in their support. As you can see, the process was one I greatly appreciated and highly recommend."

BMeinert





# What's so great about REALTORS®?

## Behind the scenes is where we really shine.

A **REALTOR®** is a licensed real estate salesperson who belongs to the National Association of REALTORS®, the largest trade group in the country.

**REALTORS®** are held to a higher ethical standard than licensed agents and must adhere to a Code of Ethics. A real estate agent is someone who is licensed to sell real property. Agents who are not REALTORS® are not subject to adherence to the Code of Ethics or additional required training required of REALTORS®.

Negotiating a real estate offer is not for the faint of heart – or for those who lack business skills. With experience in multi-tasking and in managing large corporate marketing projects, we are used to ushering paperwork through complex processes while keeping an eye on the ultimate goal, which is now getting the most from the sale of your house in the right amount of time and with the least amount of stress.

**And, we are all licensed REALTORS® with the National Association of REALTORS®. Here are some reasons why that matters:**

- We have access to current market data that can be used to price your home appropriately.
- When you aren't available, we can show your home, respond to inquiries from potential buyers and their agents, and get valuable feedback from visitors.
- We can look at your home objectively and suggest how you might improve its appearance – by staging and doing minor repairs. We have spent several years in product marketing, and your house is, in fact, a very special product!
- Coach you on the details of holding an open house. There are some tried-and-true things you can do that some agents won't tell you.
- I can screen visitors to your home by checking to see if the buyers are legitimate – or can even afford to buy your home.
- Because we have professional marketing expertise are in contact with other Realtors who work with buyers, and the support of a



large brokerage, we can market your home to a very broad audience.

- We can help you negotiate a contract that works. It will get an appropriate price for your home and meet your timeline, and it will be in compliance with all local regulations.

*For a very thorough look at the tasks a Realtor® takes on in real estate transactions, see the final pages of this handout.*

# How we market your home.

**Layering a lot of steps leads to success.**

Our marketing strategies are based on an established history of best practices targeting the largest buyer pools. Here's a list of some things we do to strategically market your home.

- **Professional photography:** We hire a professional photographer to take photos of your home. In addition to accurate pricing, professional photography is the best way to get the attention of busy agents and their buyers.
- **Signage:** A professional sign company provides the design and installation of signage at your property.
- **Just listed notices:** It might sound old-fashioned, but it works. We distribute "Just Listed" door hangers to neighbors, encouraging them to tell others about your home. We might pick up the phone and call your neighbors, too!
- **Critically important listing services:** We're members of both First Multiple Listing Service (FMLS), Georgia Multiple Listing Service (GAMLS) and Keller Williams Listing System (KWLS).
- **Brochures:** We create a high quality piece to place inside your property that showcases your property and provides buyers with a take away.



- **Target marketing to agents:** We contact real estate agents who specialize in selling homes in your neighborhood.
- **Target marketing to buyers:** We contact buyers and investors who are interested in homes similar to yours.
- **Agent tours:** We promote your house in our office and on the local MLS agent tours.
- **Open house:** We hold open-house events to create additional viewing and word-of-mouth opportunities.

# Important points about pricing.

**Like for any product, there is a 'sweet spot.'**

## Factors that influence the market value of homes:

- Supply and demand
- Economic conditions
- Asking and selling prices of similar and nearby competing homes
- Your home's condition
- The general buyer perception of your home

## Factors that don't influence the market value:

- The price you paid for the house
- Your expected net proceeds
- The amount you've spent on improvements

## So, how do buyers evaluate your home and whether or not it's a good purchase to make?

Marketing your home has only one purpose: to increase awareness among potential buyers so that it leads to in-person showings. Once buyers reach your front door, however, that job is not over.

Your home must now compete with other homes on its features and price. Pricing your home accurately is the most effective way to ensure a successful sale.

If your home has more features that appeal to buyers – or your home is priced lower than comparable homes – your home will stand out as the better value. Conversely, if your home lacks the features that potential buyers desire, your only option is to compete on price.

To be effective, your home should stand out as one of the top two to three best values in your immediate market.

Keep in mind: No amount of marketing can sell an overpriced home. What counts is the fair market value (FMV) – the highest price a buyer is willing to pay for a property.

I don't set your home's price; no agent can. The market will set the price, or value, for your home.





# A pre-listing appraisal is your best tool.

**The upfront cost is minimal compared to its value.**

The most effective method of pricing your home is to have a professional appraisal. If you choose to list with us, we can assist you with getting a pre-listing appraisal by a local, well-respected appraiser who understands the local market.

*It's worth the cost.*

Why? Because you'll receive an unbiased, third-party opinion of the market value of your home by a trained professional. That will go a long way in avoiding the headaches – and potential heartbreak – of guesswork.



## Here are some reasons you should have a pre-listing appraisal:

- You are better positioned to quickly recognize and respond to a market offer.
- You are positioned to effectively challenge a low lender's appraisal of your home, maintaining your higher contract price. A lender will consider a well-known appraiser's valuation; they will be less likely consider an estimate provided by a real estate agent.
- You avoid the common practice of a real estate agent "buying your listing" by suggesting a higher price to you than your house can really sell for. Then, because that agent would be slow to suggest a price reduction so early in the marketing process, you lose valuable time during those critical first several weeks on the market.



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Another great tool:  
your own inspection.

63%



OF BUYERS WOULD PAY **MORE FOR A HOUSE** THAT IS MOVE-IN READY OVER ONE THAT IS NOT.

Maritz research poll

*Want to give some reassurance to your buyer? Pay for a year-long home warranty to present to the buyer at closing. During the marketing process, advertising a comprehensive warranty for your home will increase buyer confidence in your home and set it apart from the competition.*

Often, you only discover potential deal-killing repairs after you are already under contract – when the buyer hires a home inspector to scrutinize every aspect of your home.

When you list and close your home with us, we will assist you with obtaining a pre-listing inspection by one of Atlanta's most experienced, and respected, inspection firms.

Discovering and repairing problems early in the marketing process places you in control, eliminating the stress of move-in ready condition repairs on the buyer's schedule. Having your house in move-in condition also helps you avoid delays to closing and demonstrates to buyers, agents and the buyer's home inspector that your house has been very well maintained.

We want buyers to focus on how they would live in your home – not what they would have to repair. Additionally, your house will stand out from the competition as a better value and command a higher price.

We will also recommend trustworthy, professional contractors to address any repairs that are needed to the extent that these repairs are made will directly impact your listing price. You have the ability to command a higher asking price, and substantiate it, when your home is in top condition.



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# How to prepare your home for sale.

Did you know that well-placed furniture can open up rooms and make them seem larger than they are? Or that opening drapes and blinds and turning on all the lights make a room seem bright and cheery?

Getting the highest fair market value and elevating your home above others in the same price range often comes down to first impressions.

**Here are some inexpensive ways to maximize your home's appeal:**

## THE EXTERIOR

- Keep the grass freshly cut
- Remove all yard clutter
- Apply fresh paint to wooden fences
- Paint the front door
- Weed and apply fresh mulch to garden beds
- Clean windows inside and out
- Wash or paint the home's exterior
- Tighten and clean all door handles
- Ensure gutters and downspouts are firmly attached

## THE INTERIOR

- Remove excess wall hangings, furniture, and knickknacks (consider a temporary self-storage unit)
- Clean or paint walls and ceiling
- Shampoo carpets
- Clean and organize cabinets and closets
- Repair all plumbing leaks including faucets and drain traps
- Clean all light fixtures

## BEFORE SHOWING

- Turn on all the lights
- Open drapes in daytime
- Keep pets secured outdoors
- Play quiet background music
- Light the fireplace (if seasonally appropriate)
- Infuse home with comfortable scent like apple spice or vanilla
- Vacate the property while it is being shown

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*"Buyers perceive homes with professional photography to be worth, on average, 12% more than the actual price."*

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# So, what do agents do?

Convinced that average Americans don't know what real estate agents, especially listing agents, do, Pat Vredevoogd-Combs, past president of the National Association of REALTORS,<sup>®</sup> put together this list. It makes a handy checklist for the selling process.

## Pre-Listing Activities

1. Make appointment with seller for listing presentation.
2. Send a written or e-mail confirmation of appointment and call to confirm.
3. Review appointment questions.
4. Research all comparable currently listed properties.
5. Research sales activity for past 18 months from MLS and public databases.
6. Research "average days on market" for properties similar in type, price and location.
7. Download and review property tax roll information.
8. Prepare "comparable market analysis" (CMA) to establish market value.
9. Obtain copy of subdivision plat/complex layout.
10. Research property's ownership and deed type.
11. Research property's public record information for lot size and dimensions.
12. Verify legal description.
13. Research property's land use coding and deed restrictions.
14. Research property's current use and zoning.
15. Verify legal names of owner(s) in county's public property records.
16. Prepare listing presentation package with above materials.
17. Perform exterior "curb appeal assessment" of subject property.
18. Compile and assemble formal file on property.
19. Confirm current public schools and explain their impact on market value.
20. Review listing appointment checklist to ensure completion of all tasks.

## Listing Appointment Presentation

21. Give seller an overview of current market conditions and projections.
22. Review agent and company credentials and accomplishments.
23. Present company's profile and position or "niche" in the marketplace.
24. Present CMA results, including comparables, solds, current listings and expireds.
25. Offer professional pricing strategy based and interpretation of current market conditions.
26. Discuss goals to market effectively.
27. Explain market power and benefits of multiple listing service.
28. Explain market power of Web marketing, IDX and REALTOR.com.
29. Explain the work the broker and agent do "behind the scenes" and agent's availability on weekends.
30. Explain agent's role in screening qualified buyers to protect against curiosity seekers.
31. Present and discuss strategic master marketing plan.
32. Explain different agency relationships and determine seller's preference.
33. Review all clauses in listing contract and obtain seller's signature.

## After Listing Agreement is Signed

34. Review current title information.
35. Measure overall and heated square footage.
36. Measure interior room sizes.
37. Confirm lot size via owner's copy of certified survey, if available.
38. Note any and all unrecorded property lines, agreements, easements.



39. Obtain house plans, if applicable and available.
40. Review house plans, make copy.
41. Order plat map for retention in property's listing file.
42. Prepare showing instructions for buyers' agents and agree on showing time with seller.
43. Obtain current mortgage loan(s) information: companies and account numbers.
44. Verify current loan information with lender(s).
45. Check assumability of loan(s) and any special requirements.
46. Discuss possible buyer financing alternatives and options with seller.
47. Review current appraisal, if available.
48. Identify Homeowner's Association manager is applicable.
49. Verify Homeowner's Association fees with manager—mandatory or optional and current annual fee.
50. Order copy of Homeowner's Association bylaws, if applicable.
51. Research electricity availability and supplier's name and phone number.
52. Calculate average utility usage from last 12 months of bills.
53. Research and verify city sewer/septic tank system.
54. Calculate average water system fees or rates from last 12 months of bills. Or confirm well status, depth and output from Well Report.
55. Research/verify natural gas availability, supplier's name and phone number.
56. Verify security system, term of service and whether owned or leased.
57. Verify if seller has transferable Termite Bond.
58. Ascertain need for lead-based paint disclosure.
59. Prepare detailed list of property amenities and assess market impact.
60. Prepare detailed list of property's "Inclusions & Conveyances with Sale."
61. Complete list of completed repairs and maintenance items.
62. Send "Vacancy Checklist" to seller if property is vacant.
63. Explain benefits of Home Owner Warranty to seller.
64. Assist sellers with completion and submission of Homeowner's Warranty application.
65. When received, place Homeowner's Warranty in property file for conveyance at time of sale.
66. Have extra key made for lockbox.
67. Verify if property has rental units involved. And if so:
68. Make copies of all leases for retention in listing file.
69. Verify all rents and deposits.
70. Inform tenants of listing and discuss how showings will be handled.
71. Arrange for yard sign installation.
72. Assist seller with completion of Seller's Disclosure form.
73. Complete "new listing checklist."
74. Review results of Curb Appeal Assessment with seller and suggest improvements for salability.
75. Review results of Interior Decor Assessment and suggest changes to shorten time on market.
76. Load listing time into transaction management software.

## Entering Property in MLS Database

77. Prepare MLS Profile Sheet—agent is responsible for "quality control" and accuracy of listing data.
78. Enter property data from Profile Sheet into MLS listing database.
79. Proofread MLS database listing for accuracy, including property placement in mapping function.
80. Add property to company's Active Listings.
81. Provide seller with signed copies of Listing Agreement and MLS Profile Data Form within 48 hours.
82. Take more photos for upload into MLS and use in flyers. Discuss efficacy of panoramic photography.

## Marketing the Listing

83. Create print and Internet ads with seller's input.
84. Coordinate showings with owners, tenants and other agents. Return all calls—weekends included.
85. Install electronic lockbox. Program with agreed-upon showing time windows.
86. Prepare mailing and contact list.
87. Generate mail-merge letters to contact list.
88. Order "Just Listed" labels and reports.
89. Prepare flyers and feedback forms.
90. Review comparable MLS listings regularly to ensure property remains competitive in price, terms, conditions and availability.
91. Prepare property marketing brochure for seller's review.
92. Arrange for printing or copying of supply of marketing brochures or flyers.
93. Place marketing brochures in all company agent mailboxes.



94. Upload listing to company and agent Internet sites, if applicable.
95. Mail "Just Listed" notice to all neighborhood residents.
96. Advise Network Referral Program of listing.
97. Provide marketing data to buyers from international relocation networks.
98. Provide marketing data to buyers coming from referral network.
99. Provide "Special Feature" cards form marketing, if applicable.
100. Submit ads to company's participating Internet real estate sites.
101. Convey price changes promptly to all Internet groups.
102. Reprint/supply brochures promptly as needed.
103. Review and update loan information in MLS as required.
104. Send feedback e-mails/faxes to buyers' agents after showings.
105. Review weekly Market Study.
106. Discuss feedback from showing agents with seller to determine if changes will accelerate the sale.
107. Place regular weekly update calls to seller to discuss marketing and pricing.
108. Promptly enter price changes in MLS listings database.

### **The Offer and the Contract**

109. Receive and review all Offer to Purchase contracts submitted by buyers or buyers' agents.
110. Evaluate offer(s) and prepare "net sheet" on each for owner to compare.
111. Counsel seller on offers. Explain merits and weakness of each component of each offer.

112. Contact buyers' agents to review buyer's qualifications and discuss offer.
113. Fax/deliver Seller's Disclosure to buyer's agent or buyer upon request and prior to offer if possible.
114. Confirm buyer is pre-qualified by calling loan officer.
115. Obtain pre-qualification letter on buyer from loan officer.
116. Negotiate all offers on seller's behalf, setting time limit for loan approval and closing date.
117. Prepare and convey any counteroffers, acceptance or amendments to buyer's agent.
118. Fax copies of contract and all addendums to closing attorney or title company.
119. When Offer-to-Purchase contract is accepted and signed by seller, deliver to buyer's agent.
120. Record and promptly deposit buyer's money into escrow account.
121. Disseminate "Under-Contract Showing Restrictions" as seller requests.
122. Deliver copies of fully signed Offer to Purchase contract to sellers.
123. Fax/deliver copies of Offer to Purchase contract to selling agent.
124. Fax copies of Offer to Purchase contract to lender.
125. Provide copies of signed Offer to Purchase contract for office file.
126. Advise seller in handling additional offers to purchase submitted between contract and closing.
127. Change MLS status to "Sale Pending."
128. Update transaction management program to show "Sale Pending."

129. Review buyer's credit report results—Advise seller of worst and best case scenarios.
130. Provide credit report information to seller if property is to be seller-financed.
131. Assist buyer with obtaining financing and follow up as necessary.
132. Coordinate with lender on discount points being locked in with dates.
133. Deliver unrecorded property information to buyer.
134. Order septic inspection, if applicable.
135. Receive and review septic system report and access any impact on sale.
136. Deliver copy of septic system inspection report to lender and buyer.
137. Deliver well flow test report copies to lender, buyer and listing file.
138. Verify termite inspection ordered.
139. Verify mold inspection ordered, if required.

### **Tracking the Loan Process**

140. Confirm return of verifications of deposit and buyer's employment.
141. Follow loan processing through to the underwriter.
142. Add lender and other vendors to transaction management program so agents, buyer and seller can track progress of sale.
143. Contact lender weekly to ensure processing is on track.
144. Relay final approval of buyer's loan application to seller.





## Home Inspection

145. Coordinate buyer's professional home inspection with seller.
146. Review home inspector's report.
147. Enter completion into transaction management tracking software program.
148. Explain seller's responsibilities of loan limits and interpret any clauses in the contract.
149. Ensure seller's compliance with home inspection clause requirements.
150. Assist seller with identifying and negotiating with trustworthy contractors for required repairs.
151. Negotiate payment and oversee completion of all required repairs on seller's behalf, if needed.
152. Schedule appraisal.
153. Provide comparable sales used in market pricing to appraiser.
154. Follow up on appraisal.
155. Enter completion into transaction management program.
156. Assist seller in questioning appraisal report if it seems too low.

## Closing Preparations and Duties

157. Make sure contract is signed by all parties.
158. Coordinate closing process with buyer's agent and lender.
159. Update closing forms and files.
160. Ensure all parties have all forms and information needed to close the sale.
161. Select location for closing.
162. Confirm closing date and time and notify all parties.
163. Solve any title problems (boundary disputes, easements, etc.) or in obtaining death certificates.

164. Work with buyer's agent in scheduling and conducting buyer's final walkthrough prior to closing.
165. Research all tax, HOA, utility and other applicable prorations.
166. Request final closing figures from closing agent (attorney or title company).
167. Receive and carefully review closing figures to ensure accuracy.
168. Forward verified closing figures to buyer's agent.
169. Request copy of closing documents from closing agent.
170. Confirm the buyer and buyer's agent received title insurance commitment.
171. Provide "Homeowner's Warranty" for availability at closing.
172. Review all closing documents carefully for errors.
173. Forward closing documents to absentee seller as requested.
174. Review documents with closing agent (attorney).
175. Provide earnest money deposit from escrow account to closing agent.
176. Coordinate closing with seller's next purchase, resolving timing issues.
177. Have a "no surprises" closing so that seller receives a net proceeds check at closing.
178. Refer sellers to one of the best agents at their destination, if applicable.
179. Change MLS status to Sold. Enter sale date, price, selling broker and agent's ID numbers, etc.
180. Close out listing in transaction management program.

## Follow Up After Closing

181. Answer questions about filing claims with Homeowner's Warranty company, if requested.
182. Attempt to clarify and resolve any repair conflicts if buyer is dissatisfied.
183. Respond to any follow-up calls and provide any additional information required from office files.





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