

Buyer Purchase Checklist

Pre-Showing

- Conduct Buyer Consultation
- Send Handwritten Thank You Note
- Add Client to Command, Create Opportunity
- Start on SmartPlan, Marketing Campaign
- Invite Client to Follow Social Media Pages
- Create File Folder (Paper or Electronic)
- Create DocuSign Room
- Send Paperwork to Buyer, Include GAR Disclosures, Buyer Brokerage Agreement, Affiliated Business Disclosure, Marketing Service Agreement, Wire Fraud Disclosure (as required by your brokerage)
- Obtain Pre-Approval Letter or Proof of Funds
- Create Home Search in FMLS & GMLS
- If Agent Referral, Sign Referral Agmt, Obtain W-9
- If Sphere or Client Referral, Send Thank You Gift