Cooke Realty Partners

Listing Appointment Checklist

Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Property to be listed \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ VACANT OCCUPIED

Client Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Mailing Address\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone: Home\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Cell\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Work\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

E-mail:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ E-mail:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Children: Names & Ages:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Lead Tracker Source

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| CCR | PCR | PC | PF | RLTR | AD | BUS | A/R | BLDR |
| Current Client Referral | Previous Client Referral | Previous Client | Personal Friend | Realtor | Sign, Internet, Mailings | Business Referral | Annual Review | Builder |
|  |  |  |  |  |  |  |  |  |

1. Why Are You Moving? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_­­­­­

2. What is the time frame for your move? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

3. "So that Kendra may be more prepared, can you give me an estimate of ALL your payoffs?"

 1st \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 2nd \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

4. Are you current on your payments? Yes or No (circle one) if not add authorization form to listing packet

5. Have you made any changes to the property since you moved in?

 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**PRE LISTING CHECKLIST**

\_\_\_\_ Lead Tracker\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_(Month)

 \_\_\_\_ Prelisting Package: (Date)\_\_\_\_\_\_\_\_\_\_ Mail\_\_\_\_ Delivery\_\_\_\_ Emailed\_\_\_\_ Pick Up\_\_\_\_

 (Folder: Sellers Packet w/ Letter, TN Prop Disc)

\_\_\_\_ Thank You Video to Referring Person\_\_\_\_\_\_\_\_\_\_\_\_\_(Date)

\_\_\_\_ Appointment for Kendra Date\_\_\_\_\_\_\_\_\_\_\_\_\_ Time\_\_\_\_\_\_\_\_\_

\_\_\_\_ Add to Top Producer

 **LISTING APPOINTMENT CHECKLIST**

**Required Forms**

\_\_ Listing Agreement

\_\_ Property Disclosure

\_\_ Lead Paint Disclosure (’78)

\_\_ Sewage Disclosure

\_\_ Disclaimer

\_\_ Confirmation

\_\_ Affiliated Disclosure

\_\_ Showing Instructions

\_\_ **Seller Net Sheet**

\_\_ **Commission Info**

\_\_ Payoff Request

\_\_ CCRs & HOA Docs

\_\_ Key

\_\_\_\_ Prepare complete listing package and put in Kendra's office

\_\_\_\_ Print Tax Record

\_\_\_\_ Print MLS Subject Property if listed previously or same street

\_\_\_\_ Print MLS Active, Pending and Sold Comparables (CMA)

\_\_\_\_ Print directions to the property if old sheet is not available

\_\_\_\_ Add Driveway call to Kendra’s calendar

**NEW LISTING CHECKLIST**

\_\_\_\_ Introduction call from Ronda – schedule pictures/VT appt.

\_\_\_\_ Security System, Yes\_\_\_ No\_\_\_\_ Code\_\_\_\_\_\_\_\_\_\_

\_\_\_\_ Box on door, SENTRI COMBO Box #\_\_\_\_\_\_\_\_\_

\_\_\_\_ Entered in MLS

\_\_\_\_ Pictures entered MLS

\_\_\_\_ Add to Evernote

\_\_\_\_ Home Warranty ordered

\_\_\_\_ Scan Property Disclosure in MLS

\_\_\_\_ Fliers ordered

\_\_\_\_ Copies, Thank You Letter, Fliers delivered to seller with handwritten note

\_\_\_\_ Thank you note to referring party

\_\_\_\_ Put up For Sale Sign

\_\_\_\_ Virtual Tour Created

\_\_\_\_ Virtual Tour link posted on MLS

\_\_\_\_ Add Listing to Top Producer

\_\_\_\_ Tell 50’s

\_\_\_\_ Add ALL information to Outlook

\_\_\_\_ Sign seller up for the e-newsletter

\_\_\_\_ Order payoff

\_\_\_\_ Set up custom search on MLS for their neighborhood