

Prospect Checklist

INITIAL MEETING

1. _____ Prospect Folder
 _____ Discuss client goals/Interview clients/gather information
 _____ Explain how I work, philosophy, hours, goals, agent expectations,
 referrals, etc.

2. _____ Housing needs sheet (discuss \$ down, \$ for closing costs)
 _____ Discuss importance of loan pre-approval
 _____ Credit Report / pre-approved
 _____ Prospect Client / Buyer Profile Sheet

3. _____ Agency Agreement, Promise of Performance, Pledge of Loyalty, Pledge of
 Agency

AFTER INITIAL MEETING (next day)

1. _____ Send Thank You for initial meeting
2. _____ If this is a referral from a past client, Send Thank You to referrer.
3. _____ Add to mailing list

SECOND OR SUBSEQUENT MEETING

1. _____ Get Agency Agreement signed???
2. _____ _____