

WELCOME TO YOUR AWESOME NOTEBOOK

Use this notebook to keep track of your clients from beginning to end and beyond. There is a place for you to keep everyone's contact information and where your clients are in the process. You also have a section for keeping track of deadlines, paperwork, to-do's and closing information. Impress your clients with how organized you are with your Real Estate Agent Notes!



▪ BUYER NOTES ▪

Client 1:

Address:

Phone:

Email:

Client 2:

Address:

Phone:

Email:

How They Heard About Me:

Contact Date:

Follow Up Date:

Contact Date:

Follow Up Date:

Lender Contact

Name: _____
Company: _____
Phone: _____ Fax: _____
Email: _____

Title Company/Closing Contact

Name: _____
Company: _____
Phone: _____ Fax: _____
Email: _____

Cooperating Agent Contact

Name: _____
Company: _____
Phone: _____ Fax: _____
Email: _____

BEFORE

- Pre-Approval Letter
- Input into Home Search
- Add to Client Management
- _____
- _____
- _____
- _____
- _____
- _____
- _____

Agreement Sent to:

- Lender
- Title
- My Office
- Co-Agent
- Client
- _____
- _____
- _____

DURING

Address: _____

Mutual Acceptance: _____

Closing Date: _____

Possession Date: _____

Purchase Price: _____

Seller Paid Closing Costs: _____

Earnest Amount: \$ _____

Due Date: _____

Inspection Start Date: _____

End Date: _____

INSPECTION APPOINTMENTS

Inspection

Date & Time

Additional To-Do's

Repair Addendum _____

Appraisal _____

Walk Thru _____

TELL MY CLIENTS ABOUT:

Address: _____ Price: _____

ML #: _____

Date of Visit: _____

Square Footage: _____

of Bedrooms: _____ # of Bathrooms: _____

Go See In-Person: yes no

Address: _____ Price: _____

ML #: _____

Date of Visit: _____

Square Footage: _____

of Bedrooms: _____ # of Bathrooms: _____

Go See In-Person: yes no

Address: _____ Price: _____

ML #: _____

Date of Visit: _____

Square Footage: _____

of Bedrooms: _____ # of Bathrooms: _____

Go See In-Person: yes no

Address: _____ Price: _____

ML #: _____

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of Bedrooms: _____ # of Bathrooms: _____

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SAMPLE

▪ BUYER NOTES ▪

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Address:

Phone:

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Client 2:

Address:

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How They Heard About Me:

Contact Date:

Follow Up Date:

Contact Date:

Follow Up Date:

Lender Contact

Name: _____
Company: _____
Phone: _____ Fax: _____
Email: _____

Title Company/Closing Contact

Name: _____
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Email: _____

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Name: _____
Company: _____
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Closing Date: _____

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Purchase Price: _____

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Earnest Amount: \$ _____

Due Date: _____

Inspection Start Date: _____

End Date: _____

INSPECTION APPOINTMENTS

Inspection

Date & Time

- | | |
|--------------------------------|-------|
| <input type="checkbox"/> _____ | _____ |
| <input type="checkbox"/> _____ | _____ |
| <input type="checkbox"/> _____ | _____ |
| <input type="checkbox"/> _____ | _____ |
| <input type="checkbox"/> _____ | _____ |

Additional To-Do's

- | | |
|---|--------------------------------|
| <input type="checkbox"/> <u>Repair Addendum</u> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> <u>Appraisal</u> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> <u>Walk Thru</u> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |

TELL MY CLIENTS ABOUT:

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Square Footage: _____

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SAMPLE

▪ BUYER NOTES ▪

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Address:

Phone:

Email:

Client 2:

Address:

Phone:

Email:

How They Heard About Me:

Contact Date:

Follow Up Date:

Contact Date:

Follow Up Date:

Lender Contact

Name: _____

Company: _____

Phone: _____ Fax: _____

Email: _____

Title Company/Closing Contact

Name: _____

Company: _____

Phone: _____ Fax: _____

Email: _____

Cooperating Agent Contact

Name: _____

Company: _____

Phone: _____ Fax: _____

Email: _____

CLIENT

BEFORE

<input type="checkbox"/> Pre-Approval Letter	Agreement Sent to:
<input type="checkbox"/> Input into Home Search	<input type="checkbox"/> Lender
<input type="checkbox"/> Add to Client Management	<input type="checkbox"/> Title
<input type="checkbox"/> _____	<input type="checkbox"/> My Office
<input type="checkbox"/> _____	<input type="checkbox"/> Co-Agent
<input type="checkbox"/> _____	<input type="checkbox"/> Client
<input type="checkbox"/> _____	<input type="checkbox"/> _____
<input type="checkbox"/> _____	<input type="checkbox"/> _____
<input type="checkbox"/> _____	<input type="checkbox"/> _____

DURING

Address: _____

Mutual Acceptance: _____

Closing Date: _____

Possession Date: _____

Purchase Price: _____

Seller Paid Closing Costs: _____

Earnest Amount: \$ _____

Due Date: _____

Inspection Start Date: _____

End Date: _____

INSPECTION APPOINTMENTS

Inspection

Date & Time

Additional To-Do's

Repair Addendum _____

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SAMPLE

▪ BUYER NOTES ▪

Client 1:

Address:

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Email:

Client 2:

Address:

Phone:

Email:

How They Heard About Me:

Contact Date:

Follow Up Date:

Contact Date:

Follow Up Date:

Lender Contact

Name: _____

Company: _____

Phone: _____ Fax: _____

Email: _____

Title Company/Closing Contact

Name: _____

Company: _____

Phone: _____ Fax: _____

Email: _____

Cooperating Agent Contact

Name: _____

Company: _____

Phone: _____ Fax: _____

Email: _____

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BEFORE

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SAMPLE

▪ BUYER NOTES ▪

Client 1:

Address:

Phone:

Email:

Client 2:

Address:

Phone:

Email:

How They Heard About Me:

Contact Date:

Follow Up Date:

Contact Date:

Follow Up Date:

Lender Contact

Name: _____

Company: _____

Phone: _____ Fax: _____

Email: _____

Title Company/Closing Contact

Name: _____

Company: _____

Phone: _____ Fax: _____

Email: _____

Cooperating Agent Contact

Name: _____

Company: _____

Phone: _____ Fax: _____

Email: _____

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Address: _____

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Address: _____ Price: _____

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SAMPLE

▪ SELLER NOTES ▪

PROPERTY ADDRESS:

Client 1:

Address:

Phone:

Email:

Client 2:

Address:

Phone:

Email:

How They Heard About Me:

Contact Date:

Follow Up Date:

Contact Date:

Follow Up Date:

Title Company/Closing Contact

Name: _____

Company: _____

Phone: _____ Fax: _____

Email: _____

Cooperating Agent Contact

Name: _____

Company: _____

Phone: _____ Fax: _____

Email: _____

LISTING APPOINTMENT

CMA _____ _____

_____ _____

_____ _____

_____ _____

_____ _____

PRE-MLS

Order Sign Post _____ _____

Photos _____ _____

MLS _____ _____

Lockbox _____ _____

Listing Contract, Disclosures _____ _____

MARKETING

- Flyer/Print Media _____
- Open House (date): _____ _____
- Broker Tour (date): _____ _____
- Social Media _____

IN CONTRACT

Mutual Acceptance: _____

Closing Date: _____

Possession Date: _____

Purchase Price: _____

Seller Paid Closing Costs: _____

Earnest Amount: \$ _____ Due Date: _____

Inspection Start Date: _____ Inspection End Date: _____

Notes & Reminders:

INSPECTION APPOINTMENTS

Inspection

Date

Home Inspection _____

Appraisal _____

Repair Addendum _____

Walk Thru _____

SOLD

PU Lockbox _____

Order Sign Down _____

Change MLS Status _____

Notes & Reminders:

SAMPLE

▪ SELLER NOTES ▪

PROPERTY ADDRESS:

Client 1:

Address:

Phone:

Email:

Client 2:

Address:

Phone:

Email:

How They Heard About Me:

Contact Date:

Follow Up Date:

Contact Date:

Follow Up Date:

Title Company/Closing Contact

Name: _____

Company: _____

Phone: _____ Fax: _____

Email: _____

Cooperating Agent Contact

Name: _____

Company: _____

Phone: _____ Fax: _____

Email: _____

LISTING APPOINTMENT

CMA _____ _____

_____ _____

_____ _____

_____ _____

_____ _____

PRE-MLS

Order Sign Post _____ _____

Photos _____ _____

MLS _____ _____

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MARKETING

- | | |
|--|--------------------------------|
| <input type="checkbox"/> Flyer/Print Media | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Open House (date): _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Broker Tour (date): _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Social Media | <input type="checkbox"/> _____ |

IN CONTRACT

Mutual Acceptance: _____

Closing Date: _____

Possession Date: _____

Purchase Price: _____

Seller Paid Closing Costs: _____

Earnest Amount: \$ _____ Due Date: _____

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Notes & Reminders:

INSPECTION APPOINTMENTS

Inspection

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Notes & Reminders:

SAMPLE

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PROPERTY ADDRESS:

Client 1:

Address:

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How They Heard About Me:

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INSPECTION APPOINTMENTS

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Notes & Reminders:

SAMPLE

▪ SELLER NOTES ▪

PROPERTY ADDRESS:

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Company: _____

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Cooperating Agent Contact

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LISTING APPOINTMENT

- | | |
|------------------------------------|--------------------------------|
| <input type="checkbox"/> CMA _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |

PRE-MLS

- | | |
|--|--------------------------------|
| <input type="checkbox"/> Order Sign Post | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Photos | <input type="checkbox"/> _____ |
| <input type="checkbox"/> MLS | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Lockbox | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Listing Contract, Disclosures | <input type="checkbox"/> _____ |

CLIENT

MARKETING

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Notes & Reminders:

SAMPLE

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