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!



Client 1:	
Address:	
Phone:	
Email:	
Client 2:	
Address:	
Phone:	
Email:	
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How They Heard About Me:	
Contact Date:	Follow Up Date:
Contact Date:	Follow Up Date:

Lender Contact		
Name:		
Company:		
Phone:	Fa	X:
Email:		
Title Company/Closing Contact		
Name:		
Company:		
Phone:	Fa	X:
Email:		
Cooperating Agent Contact		
Name:		
Company:		
Phone:	Fa	X:
Email:		
BEFORE		
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☐ Pre-Approval Letter		Agreement Sent to:
☐ Input into Home Search		Lender
☐ Add to Client Management		Title
		My Office
		Co-Agent
		Client
		
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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	

Siç	ning Date:	Time:	
Co	mpany:		
Lo	cation:		
SC	DLD		
	KEYS!	_ 0	
	All Paperwork in		
	Closing Gift		
	Add to CRM		
No	otes & Reminders:		

Address:	Price:
ML #:	
Date of Visit:	
Square Footage:	
# of Bedrooms:	
Go See In-Person: yes no	
Address:	Price:
ML #:	
Date of Visit:	
Square Footage:	
# of Bedrooms:	# of Bathrooms:
Go See In-Person: ☐ yes ☐ no	
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Notes & Reminders:



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Le	nder Contact		
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CLOSING TIME

Signing Date:		Time:	Time:	
Co	mpany:			
Lo	cation:			
SC	DLD			
	KEYS!	_ 0		
	All Paperwork in			
	Closing Gift			
	Add to CRM			
No	otes & Reminders:			

TELL MY CLIENTS ABOUT:

Address:	Price:
ML #:	
Date of Visit:	
Square Footage:	
# of Bedrooms:	
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:
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Notes & Reminders:



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How They Heard About Me:	
Contact Date:	Follow Up Dato:
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Contact Date:	Follow IIn 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 CMA COMA COMA	
PRE-MLS	
☐ Order Sign Post	
☐ Photos	
☐ MLS	□
☐ Lockbox	
☐ Listing Contract, Disclosures	

	Flyer/Print Media		
	Open House (date):		
	Broker Tour (date):		
	Social Media		
IN	CONTRACT		
Mu	tual Acceptance:		
Clo	sing Date:		
Pos	ssession Date:		
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Seller Paid Closing Costs:			
Ear	rnest Amount: \$	Due Date:	
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Notes & Reminders:			

	Inspection	Date
	Home Inspection	
	Appraisal	
	Repair Addendum	
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	Order Sign Down	
	Change MLS Status	
No	otes & Reminders:	
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Notes & Reminders:



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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

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