CLIENT INTAKE FORM

Client Name: ____

Address: ____

SECTION A - Client Info.

- ____ Enter Client Address, Email,Phone #'s into TP
- ____ Add to Newsletter (under Contact Type): E or M (add to Constant Contact if "E")
- ____ Add to Yearly Calendar (under Contact Type)
- ____ Select Category: Year____ , Senior____ , Newsletter: E____ Mailer____ or Rosedale Mailer____ ,Exclusive_____ , Rosedale Farm area____ , Others:_________________
- ____ Record Lead Source Under "Lead Info"
- ____ If Referral, record, send Thank You Letter & Gift Certificate
- ____ Record Client Name on Activity Board
- ____ Set up Hanging File and Name Tag for Client Drawer

SECTION B - Listing

Seller	***Buyer (Scan to "House Documents")***
____ BL MLS Listing Agreement	_____ Buyer Representation Form
____ BL MLS Data Info Form	_____ WWR/Agency Agreement
____ BL Agency Agreement(Working with Realtor)	_____ Obtain ID for FINTRAC FORMS
____ BL Complete Appointment Information Form	_____ Confirmation of Coop & Representation
____ Confirmation of Coop & Representation	_____ P.O.A. if Necessary

- ____ Order pictures/virtual tour
- ____ Schedule Staging Consultation with Shelley
- ____ Upload pictures to TREB as soon as the listing has been Broker Loaded
- ____ Create a slideshow in youtube and add to website
- ____ Record Address, Area, Price and Lock box on Activity Board
- ____ Add Birthdays to Green Birthday Folder and TP with 2 Days Notice
- ____ Feature Sheet file under House Docs & send for printing asap.
- ____ Add photos to Websites or if Rosedale Listing copy to Website(Bev or Rosedale) to make Virtual tours.
- ____ Add Listing to TP - Enter all details, sq ft, age & download pictures (using MLS#) and Copy Tour links to TP
- ____ Add Lock Box Code to Listing Details in TP
- ____ Add Listing to Facebook Business Pages, Bev's website or Rosedale Website)
- ____ Get Suvery from Client and Scan it into "House Documents" Folder(Email to lawyer with AP & S)
- ____ Scan MLS Listing Agreement to House Documents Folder
- ____ Scan FINTRAC ID Forms (add to 'House Documents' folder) & email to Accounting
- ____ Print 20 copies of the MLS Listing for the Client and Print 1 & Staple to the back of Client Intake Form & Geo Report
- ____ Write MLS# on Activity Board in Office

SECTION C - Agreement of P &S (accepted)

- ____ Email a copy of A P & S to client
- ____ Email Front Desk of status change(i.e. conditions, sold price, co-op agent and closing date)
- ____ Scan AP & S to "House Documents" folder
- ____ Get seller's lawyer info and email a copy of A P & S
- ____ Get buyer's lawyer info and email a copy of A P & S
- ____ Add the Cooperating Agents Contact info into TP(as soon as deal is accepted)
- ____ Schedule Home Insp.& confirm with Listing Agent & Record in TP
- ____ If it is our Co. Listing, deposit goes to front desk & client gets receipt
- ____ If it is another broker's listing, we need a copy of the deposit cheque and receipt - send to accounting
- ____ Complete the "Receipt of Funds" Fintrac form and send to accounting (Not required if Our Listing)
- ____ Prepare Trade Record - After Signed - Save to "House Documents" folder
- ____ Email 1 copy of signed Trade Record to accounting
- ____ ***Record when Waivers are Due in Team Calendar 1 day earlier from the due date*** :
- ____ Home Inspection - Due Date ____________ Status - Due Date ____________
- ____ Financing - Due Date ____________ Others Due Date ____________
- ____ ***Upon Receipt of Waivers, send to Cooperating Agent Immediately***
- ____ Email Offer & MLS Listing to Mortgage Broker & Lawyer Along with Waivers and Amendments once Completed
- ____ Sale of Purchaser's Property - Due Date _________________
- ____ Create Closing in TP
- ____ Record Sold Price + Closing date on Sales Activities Board

Record Advisors:

- ____ Home Inspector
- ____ If out of town Agent, add to E-Newsletter in Constant Contacts and add the Agent's info in TP under "Closing Parties"
- ____ Copy All documents to Client TP File - Drop Box

SECTION D - Accounting Department Package

- ____ Trade Record Sheet — Date Form Sent: ________
- ____ Copy of A P & S, and Schedule B — Date Form Sent: ________
- ____ Confirmation of Cooperation & Representation
- ____ FINTRAC Individual ID Info Record **- To Accounting**
- ____ FINTRAC Receipt of Funds Record **(FOR BUYERS ONLY - IF ANOTHER BROKER'S LISTING)**
- ____ If BUYER, Accounting will need Buyer Rep. & WWR/Agency Agreement

Waivers when completed** **(to be scaned to House Documents & Emailed to Accounting)

- ____ ____Home Inspection ____Status Certificate
- ____ ____Financing ____Other: __________________________

SECTION E - When Deal is FIRM

- ____ Transfer Listing in TP to Closing Address
- ____ Update Category List(i.e. if they moved from Rosedale,take them off the Rosedale Fram Area Category)
- ____ Record in Anniversary in Binder & TP.
- ____ Put New Address in Send out Cards & Delete Old address
- ____ Record Closing Date and Price on Client Activity Board
- ____ Record A Follow up call "To do" for Bev (5 days prior to closing)
- ____ Mail/Deliver Closing Package (Thank You Note, Moving Tips, Brick Certificate & New Address Labels, Canada Post Change of Address)
- ____ Deliver House Warming Gift on Closing
- ____ If Referral - Deliver Thank You Note & Gift Card (to store of their choice)

Date:

Date: