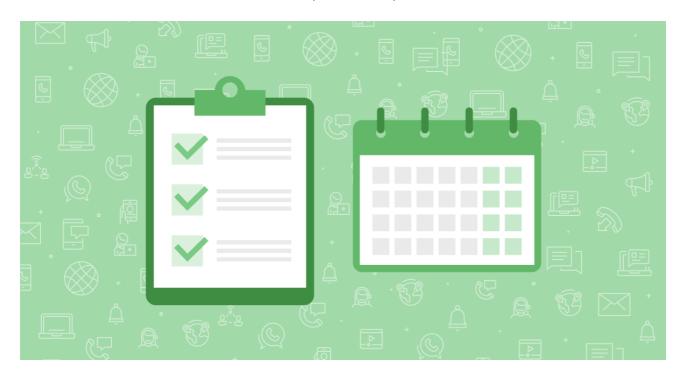
Onboarding Checklist: Real Estate Client (Seller)

Use this real estate client (seller) information onboarding checklist to make sure your new client's needs can be met, understood, and obtained.



GATHER CONTACT INFORMATION

Name
Best contact number
Address
Home owner insurance

RECEIVE DOCUMENTS FROM SELLER

Tax documents
Mortgage statements
Association documents
Appraisal documents
Home repair and maintenance
Recipes for home improvements
Check MLS for additional information about the home

PITCHING TO NEW OR POTENTIAL CLIENT

Send out a welcome email to (new or potential) client

Make and Share Free Checklists checkli.com