

Listing Procedure

Pre-Listing Process

1. Order Realtor Report From Title Company
2. Create CMA
3. Check out Lock Box (with Barb or staff)

Listing Appointment

4. Bring:
 - Listing Agreement
 - Condition Report
 - Addendum S (if before 1978)
 - Sellers Improvement Sheet
 - Mortgage Release
 - Closing Cost Estimate
 - Camera
 - Lock Box
 - Measurer
5. Measure Home (can use previous measurements if accurate in MLS/Paragon)
6. Photos of the Home
7. Collect Key and install Lock Box
8. Showing Time Preferences

In-Office Procedure

9. Send PRE-MLS email to gb@shorewest.com
10. Upload Photos to Photo Drive
11. Input Listing Info in Paragon
 - Go to Listings – Add Listing (pick type of property; residential, vacant land, etc.)
Fill out all tabs and SAVE PARTIAL. This goes to Barb (and staff) and they will input the rest of the info to MLS **DO NOT HIT CONFIRM**
12. Submit Listing for Review in DotLoop
 - Listing Agreement
 - Condition Report
 - Addendum S (if before 1978)
 - Sellers Improvement Sheet (if applicable)
 - Closing Cost Estimate
 - Tax Report
 - Plat Map
 - Listing Cover Sheet
 - Sign Request Form
 - Ad Form
 - Electronic Consent

Once in MLS

13. Showing Time- Once it is in the MLS/Paragon you will go to Showing Time and add your preferences and the seller's information for showings.

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The Shorewest Experience

an Optional Gift Program for your Clients

Coverage areas include:

Brown, Door, Kewaunee, & Oconto counties, Fox Cities and Shawano area.

Marketing Dollars can be used to purchase this gift program.

Packages cannot be modified. If the property fails to close, the products will be delivered to you, to be used any way you choose.

Contact person is Becky Diedrick

BUYER PACKAGE

*Wine at Accepted Offer
*Basket on Closing Day
Post-close Card w/Gift Card

\$75 Cost to Agent
\$125 Value

SELLER PACKAGE

Flowers at New Listing
*Wine at Accepted Offer
Post-close Card w/Gift Card

\$75 Cost to Agent
\$125 Value

COMBO PACKAGE

Flowers at New Listing
*Wine at Accepted Offer
*Basket on Closing Day
Post-close Card w/Gift Card

\$100 Cost to Agent
\$175 Value

The wine is a Riesling wine from a local winery. Non-alcoholic Door County Cider can be substituted.

The Flowers are delivered from a local florist with a note card from you.

The Basket includes snacks, candy bars, paper plates, cups, napkins and utensils, paper towels, toilet paper, water and a \$25 gift card to a local restaurant.

The Post-closing card is mailed out 25 days after the closing with a card signed by you and a \$25 gift card for either Amazon or Home Depot (your choice).

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See next page for samples.

*Agent delivers these items.

Flowers



Gift Basket



Wine & Holder



PROPERTY INFORMATION

MLS #: _____

SHOREWEST EXPERIENCE

Property Address: _____

City: _____ Village/Town: _____ State: _____ Zip Code: _____

Tax Parcel #: _____ Property type: _____

LISTING INFORMATION

Listing Company: _____ Listing Agent: _____

Listing Company Contact Info.: _____

Seller One: _____ Homestead: _____

Email: _____ Phone: _____

Seller Two: _____

Email: _____ Phone: _____

Seller's Address (if different than property address): _____

City: _____ Village/Town: _____ State: _____ Zip Code: _____

Forwarding Address: _____

City: _____ Village/Town: _____ State: _____ Zip Code: _____

List Price: _____ List Date: _____ Exp. Date: _____

Listing Commission: _____ Co-Broke/MLS: _____ Admin. Fee: _____

Listing Referral: Yes No To: _____ % Seller Source: _____ Listing Activity Report Agent Branded App Marketing Plan Listing Binder (Over \$100,000) .NET Category Name _____ 10-Up / 10-Down Thank You Letter Testimonial Tree Electronic Consent**AGENT CHECKLIST / REMINDERS:** Listing Contract Spec Sheet Addendum "S" Warranty Plan Sellers Closing Statement Mortgage Info Sheet Partial Save in MLS Agency Disclosure Sign Order Copy Prior Title/Abstract R.E. Condition Report

Lock Box - Code _____

Lock Box Location: _____

PENDING INFORMATION Pending Home Sale Secondary

Buyer One: _____ Homestead: _____

Email: _____ Phone: _____

Buyer Two: _____

Email: _____ Phone: _____

Buyer's Address (if different than property address): _____

City: _____ State: _____ Zip Code: _____

SW EXPERIENCE SW BUYERS AGENT SIDE

Selling Company: _____ Selling Agent: _____

Selling Company Contact Info.: _____

Title Company: _____ Phone: _____

Lender: _____ Loan Officer: _____

Phone: _____ Email: _____

Type of Financing: _____

Date Offer Written: _____ Date of A/O: _____ Date of Close _____

Sale Price: _____ Commission %: _____ Based on \$ _____

Splits: List Side _____ Sale Side _____ Buyer Agency: Selling Referral: Yes No To: _____ % Buyer Source: _____

Please Check the Following You Would Like Staff to do at Closing:

 Assign Marketing Plan Testimonial Tree (provide email if different than above) _____

Return Binder Date: _____

SELLER

2 Weeks to Closing Reminder Checklist

- Final loan commitment and appraisal received.
- Utilities. Call appropriate utility service companies and let them know of your move. (We take care of municipal water, if any)
- Closing document review. Approx. 1 week prior to closing, we will review closing costs and proceeds for accuracy.
- Pre-close. We will set a day/time approx. 1-3 days prior to closing to pre-sign all the necessary documents. We will attend closing on your behalf.
- Buyer final walk through
 - I'll schedule the date and time with you up to 3 days prior to closing for Buyer and Buyer's agent attends
 - Check to make sure all inclusions in the offer are left in the home
 - Check to make sure all home inspection times (if any) are complete and receipts are brought to pre-closing
 - Check to make sure the property is in the same condition other than normal wear and tear
- Proceeds check. We will handle the proceeds check by the following options:
 1. Deposit (Bring your deposit slip to the pre-closing)
 2. Wire (Bring bank routing and account number)
 3. Pick up at Shorewest Realtors
 4. Mail

We are almost to closing day! Please call me if you have any questions along the way.

Regards,



My Listing Accepted Offer

1. Make Sure all Documents are in DotLoop and Submit for Review
6. In DotLoop: Share a Copy to the Title Company you Ordered the Realtor Report From
7. In DotLoop: Share a Copy to the Buyer's Lender *IF it is your buyer*
8. In DotLoop: Share a Copy to Neighbor Works (IF applicable)

Track all Contingencies and Deadlines

1. Add any additional documents along the way (amendments, inspections, etc.)
2. Earnest Money for Shorewest listings is made out to: Shorewest Realtors Trust
3. Any amendments changing price, closing dates, etc. to be submitted for review via DotLoop

Heading to Closing

1. ONE-TWO WEEKS PRIOR TO CLOSING:
Schedule Closing With: (customary for buyer to choose time and place)
 - GBSTAFF@Shorewest.com to schedule the closing including DATE, TIME, LOCATION.
IF at Shorewest include BUYER(S) NAME and Address of the Property.
 - Lender
 - Title Company
2. Schedule PRE-Closing with the Seller (Approx. 2-5 days prior to closing Title Company Will Give You the Package) You will need assistance from the Title Co. or a Notary if you are not a Notary to Pre-Close
3. Schedule Final Walk Through With Buyer's Agent (Buyer's Agent Usually Will Call to Schedule with you 1-3 days prior to closing)
4. Pick Up Lock Box and Key For Closing (After Final Walk Through is Completed)

At Closing

1. Bring File From the Office to the Closing Which Also Should Include: (If you are not attending closing, be sure the Title Co. has the full file)
 - Co-Broke Check
 - Key
2. Bring Back CD (Closing Disclosure & any Checks) to Peggy
3. Deliver Seller Proceeds Check (If applicable)

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Buyer Agency: Tell them all involved → increase the need for an Agency Agreement

Dear **Buyer/Seller**,

Congratulations on your accepted offer for **123 Main St.**! Many things must happen prior to a successful closing and I want you to know I will be here for you every step of the way. To ensure it goes as smoothly as possible, I have detailed the important dates and what needs to be done below:

Event	Date or N/A	Responsibility	Notes
Accepted Offer Date	12-2-15	N/A	Most deadlines in the offer run from this date
Lender Notification	12-2-15	Buyer	Notify loan officer of accepted offer. Follow their instructions on what needs to be turned in
Earnest Money	12-5-15	Buyer	Earnest money of \$2,000 . Make check payable to Shorewest Realtors Trust Account & bring to 11622 W. North Ave., Wauwatosa
Confirmation of Loan Application	12-9-15	Buyer	Submit a written confirmation from your lender stating you have applied for financing
Home Inspection Contingency	12-12-15	Buyer	Schedule home inspection ASAP. Home inspection & any negotiating must be completed by this date
Condo Declarations	12-12-15	Seller	You have 5 business days to review documents after receiving them from the seller
Homeowner's Insurance	Before Closing	Buyer	Order Homeowner's Insurance on the property; Leave enough time for any inspections needed
Testing Contingency Type: Radon	12-17-15	Seller	
Well Water & Well System Inspection Contingency	12-17-15	Seller	
Sanitary System Inspection Contingency	12-17-15	Seller	
Home Sale Contingency	1/29/16	Buyer	
Loan Commitment	1-6-16	Buyer	Submit a loan commitment (obtain from loan officer) along with a Permission to Deliver notice
Title Commitment	1/22/16	Buyer	Will receive approximately 5 days before closing or earlier; buyer to review Title Commitment
Utilities Transfer	Before Closing	Buyer & Seller	Work with Home Services to get utilities switched over 1-800-414-0044
Walk Through Property	Before Closing	Buyer	Walk through before closing & make sure there has been no significant change in the condition
Closing Disclosure (CD)	1/25/16	Buyer	Review Closing Disclosure provided by lender
Closing	1/29/16	Buyer & Seller	Will be scheduled with your lender (if financed)
Other Provisions: <i>Insert any notes for the buyer</i>			
Appliances Included in the sale: <i>oven, refrigerator, washer, and dryer</i>			
Tax Proration: 105%			

Agent Smith
Phone number
Email



My Buyer Accepted Offer

1. Make Sure all Documents are in DotLoop and Submit for Review
6. In DotLoop: Share a Copy to the Title Company you Ordered the Realtor Report From
7. In DotLoop: Share a Copy to the Buyer's Lender *IF it is your buyer*
8. In DotLoop: Share a Copy to Neighbor Works (IF applicable)

Track all Contingencies and Deadlines

1. Add any additional documents along the way (amendments, inspections, etc.)
2. Earnest Money for Shorewest listings is made out to: Shorewest Realtors Trust
3. Any amendments changing price, closing dates, etc. submit for review via DotLoop Peggy/Mary

Heading to Closing

1. Schedule Final Walk Through With Buyer and Set in Showing Time
2. Schedule Closing With: (customary for buyer to choose time and place)
 - GBSTAFF@Shorewest.com to schedule the closing including DATE, TIME, LOCATION. IF at Shorewest include BUYER(S) NAME and Address of the Property.
 - Lender
 - Title Company
 - Listing Agent

At Closing

1. Bring CD (Closing Disclosure & any Check) From the Office to the Closing
2. Bring back a copy of the signed Buyer's/Seller's closing statement and hand in to Peggy/Mary

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BUYER ACCEPTED OFFER CHECKLIST

- EARNEST MONEY OF \$ _____ IS DUE WITHIN _____ DAYS AND SHOULD BE MADE OUT TO: _____
MAILED OR DROPPED OFF TO: _____
- HOME INSPECTION DUE: _____
This means the home inspection and any negotiations must be done within this time.
- RADON DUE: _____
- WELL/WATER/SEPTIC DUE: _____
Seller or Seller's Realtor /Buyer or Buyer's Agent shall order
Seller / Buyer shall be responsible for the cost of test/inspections
- OFFER DOCUMENTS TO THE LENDER
We will send your offer documents to the Lender. Be sure to get all additional documents to the Lender ASAP
- LOAN COMMITMENT DUE: _____
The loan officer will send you a copy of the loan commitment. You will need to share this with me, and we will sign a notice officially removing this contingency.
REMINDER Do not make any major purchases such as furniture, appliances and automobiles unless you consult with your loan officer.
- APPRAISAL DUE: _____
Appraised value must be at or above purchase price.
- FINAL WALKTHROUGH
We will schedule a final walkthrough within 1-3 days prior to closing to check on the following items:
- Make sure the property is in the same condition other than normal wear and tear
 - Make sure the inclusions in the Offer to Purchase remain in the home
 - Make sure home inspection repairs, if any, are complete

Congratulations!

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Dear *Buyer/Seller*,

Congratulations on your accepted offer for **123 Main St.** Many things must happen prior to a successful closing and I will be here for you every step of the way. To ensure it goes as smoothly as possible, I have detailed the important dates and what needs to be done below:

Event	Date or N/A	Responsibility	Notes
Accepted Offer Date		N/A	Most deadlines in the offer run from this date.
Lender Notification		Buyer	Notify loan officer of accepted offer. Follow their instructions on what needs to be turned in.
Earnest Money		Buyer	Earnest money of _____. Make check payable to Shorewest, REALTORS® Trust Account and bring to _____.
Confirmation of Loan Application		Buyer	Submit a written confirmation from your lender stating you have applied for financing.
Home Inspection Contingency		Buyer	Schedule home inspection ASAP. Home inspection and any negotiating must be completed by this date.
Condo Declarations		Seller	You have five business days to review documents after receiving them from the seller.
Homeowner's Insurance	Before Closing	Buyer	Order Homeowner's Insurance on the property; leave enough time for any inspections needed.
Testing Contingency Type:			
Testing Contingency Type:			
Well Water and Well System Inspection Contingency			
Sanitary System Inspection Contingency			
Loan Commitment		Buyer	Submit a loan commitment (obtain from loan officer) along with a Permission to Deliver notice.
Title Commitment			Will receive approximately five days before closing or earlier; buyer to review Title Commitment.
Firpta Certification		Seller	
Utitlies Transfer	Before Closing	Buyer & Seller	
Walk Through Property	Before Closing		Walk through before closing and make sure there has been no significant change in the condition.
Closing Disclosure (CD)		Buyer	Review Closing Disclosure provided by lender.
Closing Set		Buyer & Seller	Will be scheduled with your lender (if financed).
Other Provisions:			
Appliances included in the sale:			
Tax Proration:			





HOME INSPECTION HANDOUT FOR HOME BUYERS

1. How do I select a reputable home inspector?

The Inspection Contingency in the residential offer to purchase calls for a Wisconsin registered home inspector. Ask your REALTOR® for a list of competent area home inspectors or look in the yellow pages. You can confirm the home inspector's registration with the Department of Regulation and Licensing online at <http://drl.wi.gov/drl/drllookup/LicenseLookupServlet>.

2. Will the home inspector inspect every feature of the house?

No, the home inspector must inspect certain features required by state law and may inspect additional components and features in his or her discretion or by agreement between the home inspector and his or her client.

3. Can I ask the home inspector to look at specific components and items?

Yes, as the home inspector's client you may request that the home inspector inspect specific components and items, as long as they are readily accessible. It may be best to make these requests in writing to avoid confusion.

4. May all of the problem areas mentioned in the home inspector's report be listed in a notice of defects for the offer to purchase?

No, the home inspection report will look at property conditions in a general fashion and may list many property conditions that are not serious enough to fit the definition of a defect in the inspection contingency.

5. What does the home inspector include in the home inspection report?

The home inspector gives a comprehensive report that includes comments—good, bad and neutral—on all of the different components, systems and items the home inspector is required to inspect. The home inspector does report on the condition of any building component, improvement or item that if not repaired, will have significant adverse effect on the useful life of the item. The home inspector also notes any conditions that may significantly reduce the functionality or structural integrity of property components or systems, or that may pose a significant health or safety risk to building occupants.

6. How does the inspection contingency in the offer to purchase work?

In the offer to purchase, a buyer must evaluate whether there are any defects listed in the home inspection report to which the buyer objects and which the buyer wants the seller to fix before the buyer will purchase the property. A defect is a structural, mechanical or other condition that would have a significant adverse effect on the value of the property, significantly impair the health or safety of future occupants, or, if not repaired, removed or replaced, significantly shorten or have a significant adverse effect on the expected normal life of the entire property.

7. Should I always give a notice of defects?

This decision is made on a case-by-case basis, depending upon the circumstances and what is best for you. Your REALTOR® and your attorney can help explain the pros and cons of giving a notice of defects.

8. If the seller discloses a problem on the Real Estate Condition Report, may I include that on the notice of defects?

If a defect has been previously disclosed in sufficient detail so that you are aware of the nature and extent, then you generally cannot list the problem as a defect if you give a notice of defects under the inspection contingency.