



Agent Training  
July 27<sup>th</sup>, 2021

## UPDATES & REMINDERS

- 1) Expect to see foreclosures and short sales start entering the market in September or October. This should help slow the feeding frenzy of the supply and demand craziness. I would expect to see the market start to normalize by January
- 2) If you haven't taken a CE class in the last 6 months you need to sign up for one. Our Policies & Procedures require all agents to take at least 1 CE every 4 months
- 3) All our agents are allowed to do sales and leases, however only myself and Sylvia are permitted to do Property Management. As an agent you cannot manage any properties for landlords, including your own properties, without a Property Management Certification and approval from me as the Broker



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会说中文!

**San Jacinto Properties welcomes  
Weiye Shi to our brokerage**

## **Top Producing Agents as of July 27<sup>th</sup>**

**Jeremy Ellison – 6 Transactions**

**Bruce Carter – 4 Transactions**


**Kelly Yates – 4 Transactions**

**Ashley Marcum – 3 Transactions**

**Jerrice Bridges – 3 Transactions**



# New Link on Agent's Only page for helpful articles

<a href="#">San Jacinto Properties Onboarding Information For New Agents</a>	<a href="#">Talki</a>
<a href="#">POLICIES &amp; PROCEDURES MANUAL</a>	<a href="#">Showing</a>
<b>AGENT TRAINING</b> <a href="#">click here</a>  <a href="#">HAR Classes</a> <a href="#">10 Things You Should Do Every Week</a> <a href="#">Links to Helpful Articles</a>	<a href="https://entp.hud.gov">https://entp.hud.gov</a> <b>FHA Condo</b>  <b>San Jacinto</b>
<b>SAMPLE CONTRACTS</b>	<a href="#">IRS Ta</a>
<a href="#">Information About Brokerage Services</a>	<a href="#">LoopNet C</a>

## Helpful Articles for Real Estate Agents

### Creating a Real Estate Business Plan

<https://www.keyrealestateresources.com/the-ultimate-real-estate-agent-business-plan/>

<https://placester.com/real-estate-marketing-academy/real-estate-business-plan-template>

### Lead Generation Ideas

<https://theclose.com/real-estate-lead-generation-ideas/>

<https://www.realtrends.com/21-underrated-real-estate-lead-generation-ideas/>

### Tips from Successful Real Estate Agents



**San Jacinto Properties**  
 (713) 894-9436 Office  
 SanJacintoProperties.com

TO: email:  
 FROM: email:  
 PROPERTY ADDRESS:  
 BUYER: SELLER:

**COMMISSION DISBURSEMENT AUTHORIZATION**

San Jacinto Properties represents the:  BUYER  
 SELLER  BUYER & SELLER as an Intermediary  
 Per the terms of the contract or listing agreement our  
 brokerage has earned the commission indicated below.

Total Commission: \$ \_\_\_\_\_ Please disburse the funds as follows  
 \$ \_\_\_\_\_ to \_\_\_\_\_ an agent with San Jacinto Properties  
 \$ \_\_\_\_\_ to David Turnquist (Broker/Owner of San Jacinto Properties)  
 \$ \_\_\_\_\_ to the Buyer \_\_\_\_\_, and shown on the  
 Closing Disclosure as a disclosed "REALTOR CONTRIBUTION" credit  
 towards closing costs

\_\_\_\_\_ Broker – TREC License # 469898  
 David Turnquist *\*Not Valid Without Broker's Signature*

\*In the event that the check needs to be mailed, please overnight mail it to:  
 3222 Somerton Drive, La Porte TX 77571

Please be sure you are using this CDA form

Send it to me at least 72 hours before closing (preferably a week)

Fill everything out COMPLETELY

CHECK YOUR MATH and DOUBLE CHECK IT. Make sure you are  
 calculating it on the correct sales price (it didn't change) and that  
 the commission % is correct (3%, 2.5%, 2%, etc)

If you are giving any money to your buyer (or seller) please be  
 sure it is disclosed on this form. It is illegal to give money to a  
 client without disclosing to all parties in advance.

If I don't return the signed copy to you within 24 hours, please  
 TEXT me and remind me. I may have opened the email and then  
 forgot about it

Be sure that the Title Company gets this form no later than 72  
 hours before the closing, otherwise the Final CD will be  
 incorrect.

David Turnquist  
 Broker



[Dava@SanJacintoProperties.com](mailto:Dava@SanJacintoProperties.com)  
 3222 Somerton, La Porte TX. 77571

[Buyer's Agency Form](#)

[Buying a Home - What You Can Expect](#)

[Buyer's Checklist](#)

[Open House Manual](#)

[Open House Sign In](#)

[Open House Feedback](#)



[Listing Checklist](#)

[MLS Listing Data Sheet](#)

[Preparing Your Home To Sell](#)

[Market Value Pyramid](#)

[Seller Information for Title Company](#)

[Seller's Additional Info to Buyer](#)

[Selling Your Home - What You Can Expect](#)

**We all have clients that are either very picky, impatient, or feel they know more than you do. The key to staying in control of the transaction is to let the client know, in advance, what to expect and when to expect it. These handouts will help explain the process to your buyer or seller from the very beginning so they know what is going on and that you are on top of things.**

**You can also share the Buyer's Checklist or the Seller's Checklist with your client so they can see that you are checking things off in the order they are supposed to happen. Usually when you show them these things they will be less likely to challenge you or ask questions they already know the answer to.**



# BUYER'S CHECKLIST

Date	Task
	Received copy of Pre-Approval Letter from lender
	Send IABS form to Buyer and have an initialed copy on file
	Send "Buying A Home – What You Can Expect" form to Buyer
	Counsel Buyer to be sure they know your expectations / availability
	Set up a custom search portal in MLS for the buyer with auto email
	Send MLS 360 copy, disclosures and CMA for each showing
	Discuss & Explain the offer pros and cons before submitting it
	Read the "Agent Remarks" and verified the commission being offered
	Verify that contract and addenda are accurate and complete
	Received EXECUTED contract and verified execution date is on it
	Send copies of executed contract to buyer, lender & title company
	Verify that Earnest Money & Option Fee were delivered to title co.
	Verify that Home Inspection was scheduled and Completed
	Submit Amendment before Option Period expires (if necessary)
	Verify that Appraisal and Survey have been ordered (if necessary)
	Set up closing appointment that is convenient for all
	Verify that Home Warranty has been ordered (if necessary)
	Remind Buyer about setting up utilities for day of closing
	Send signed "Commission Disbursement Authorization Form" (verify math)
	Get "Walk-Through & Acceptance Form" signed by buyer
	Verify "Final Closing Disclosure" numbers for accuracy
	Remind Buyer to bring license for Notary
	Remind Buyer that closing funds must be "Wired or Certified Funds"
	Obtain closing gift / thank you card or other gesture
	Attend Closing and verify funding for keys and access for Buyer
	Submit this form to Broker within 24 hours of closing date

**Use this checklist for every buyer client you have and then submit it to me after closing**

**This is not an option. You need to do this with every buyer transaction**



# LISTING CHECKLIST

This form to be completed and kept on file for all MLS listings

ADDRESS: \_\_\_\_\_ MLS # \_\_\_\_\_

	CMA of area properties completed and explained to client
	Tour of home & property with suggestions to seller (repairs, painting, storage)
	Listing Agreement completed and signed by you and the client
	MLS Listing Data Sheet completed
	List of Exclusions (if any)
	Any leases on the home? Tenants, Security Systems, Solar Panels, etc
	Seller's Additional Information Form (updates, floorplan, warranties, utilities)
	Sellers Disclosure Notice completed by seller
	Other Required Disclosures (LBP, MUD, HOA, Leases, etc)
	Copy of Survey, T-47 Affidavit (if available)
	At least 12 photographs taken (Virtual Tour if applicable)
	Lock Box installed with keys inside (record lock box serial # on file)
	Yard Sign installed
	Listing Flyers completed (or use a QR Code on the sign)
	Talking House or website or phone # with home information (if desired)
	All Disclosures uploaded into DOCS on MLS
	Survey & T-47 uploaded into DOCS on MLS (if available)
	Photos uploaded and arranged in order on MLS
	MLS listing ACTIVE and printout of MLS Agent Full sheet
	Proofread all information on MLS listing and had seller give approval
	Entered all listing data and contact information on ShowingTime Website
	Emailed Dave Turnquist a .PDF copy of all documents listed above
	Turned a signed copy of this form in to Dave Turnquist with all boxes checked

Use this checklist for every LISTING you have and then submit it to me within 48 hours of the listing going ACTIVE

This is not an option. You need to do this with every LISTING you have. I may not sign your CDA if I don't have this on file from you.





# SELLER'S CHECKLIST

Use this checklist for every seller client you have and then submit it to me after closing. This form is used once the home has already been listed and is now receiving offers

**This is not an option. You need to do this with every seller transaction. Using these checklists minimizes the possibility of errors or missed deadlines.**

Date	Task
	Review offers and discuss pros and cons with seller
	Verify contract and calculations are correct & addenda attached
	Send EXECUTED contract to Buyer's Agent, Lender, Title Co, and Seller
	Change MLS to OP or PS or P
	Verify Home Inspection day and time and that all utilities are still on
	Discuss any amendment that comes in with the seller
	Send executed amendment to all parties involved (if needed)
	Send completed "Seller's Information for Title Company" form to title
	Change MLS to PS or P
	Review Title Commitment for any issues that could delay closing
	Verify that any repairs in the amendment have been completed
	Verify that appraisal has been ordered
	Verify that survey has been ordered (if necessary)
	Set up closing appointment that is convenient for all
	Remind seller about cancelling utilities & insurance on closing day
	Send signed "Commission Disbursement Authorization Form" (verify math)
	Remind seller to leave the home clean and in move-in condition
	Verify "Final Closing Disclosure" numbers for accuracy
	Remind seller to bring license for Notary
	Remind seller to bring all keys, remotes and passwords / pins
	Remind seller to have bank routing instructions with them at closing
	Obtain closing gift / thank you card or other gesture
	Attend Closing and verify funding for keys and access for Buyer
	Change MLS to Sold and remove all signs and lockboxes
	Submit this form to Broker within 24 hours of closing date



**Additional Information  
From the Seller**

*NOTE TO BUYER: This information is provided by the seller as a courtesy to the buyer and is deemed reliable to the best knowledge of the seller. Neither San Jacinto Properties nor any of its agents have verified this information and are not liable for any errors or inaccuracies. It is the sole responsibility of the buyer to verify this information.*

List any improvements/updates to this home made in the last 10 years that you are aware of and the approximate date each was completed (flooring and carpeting, countertops, remodeling, roof, AC/Heat, electrical, plumbing, fencing, landscaping, decking, etc): \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Is there an existing survey available? \_\_\_\_\_

Are there any current leases in effect on the property? \_\_\_\_\_

Are there any exclusions that the seller is claiming? \_\_\_\_\_

Are there any items in the home controlled by an app, remote control or password/PIN # ? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Any Warranties and/or Transferable Warranties (foundation, HVAC, roof, etc): \_\_\_\_\_

\_\_\_\_\_

What are you currently paying for insurance?

Standard Homeowners \_\_\_\_\_ Flood \_\_\_\_\_ Windstorm \_\_\_\_\_

What are your average monthly utilities?

Electric: HIGH \_\_\_\_\_ LOW \_\_\_\_\_ Gas: HIGH \_\_\_\_\_ LOW \_\_\_\_\_

Water/Sewer: HIGH \_\_\_\_\_ LOW \_\_\_\_\_

**Be sure your seller completes this form along with the Seller’s Disclosure and then upload this, along with the seller’s disclosure, into the Agent Only Docs on the MLS listing**

**This information is very helpful to the buyer and will save you time from having to go back to the seller to get these questions answered later on.**

**Questions**

**Comments**

**Concerns**

**Anything you want to share?**

