

Annual Real Estate & Home Equity Review

Name: _____ Date _____

Address: _____

Home Anniversary: _____ Primary/Invest/2nd: _____

Name/B-day: _____ Name/B-day: _____

Family (kids/pets): _____

Notes from Sale: _____

Follow-up Plan: _____

Let's Talk About Your Home!

Any Issues?: _____

Any Improvements Made: _____

Planning Any Improvements: _____

Mortgage Co./Loan Officer: _____ Rate/Type: _____

Do you need to refinance (lower rate/cash-out/lower term)? _____

Would you like an updated market analysis (true home value) _____

Other Properties? _____

Do you have a desire to buy more properties/invest:

Do you have any questions for me?

Professional Recommendations:

1. Do you have a financial planner/advisor? Yes No
Who? Rate on a scale of 1 to 5: _____

Do you need a recommendation to a financial planner/advisor? Yes No

2. Do you have an insurance agent? Yes No
Who? Rate on a scale of 1 to 5: _____

Do you need a recommendation to a local insurance agent? Yes No

3. Do you have a contractor? Yes No
Who? Rate on a scale of 1 to 5: _____

Do you need a recommendation to contractor? Yes No

4. Do you have a need for any recommendations? Yes No
What? _____

The Market:

Do you have any market questions for me? Yes No
What? _____

Is your current home your DREAM HOME? Yes No

Describe your dream home? _____

[In closing, move to ROI convo – bought for, now worth... taxes up or down... all about you form]

CLOSE: *"I truly enjoyed working with you and want to ask, who do you know right now that is interested in buying or selling? I would love to help them! "*

[Internal]

Step 1: The last week of the month, print list all annual reviews for next month

Step 2: Send annual review letter & questionnaire to client (direct mail)

Step 3: Book 15-30 minute review appointment (zoom, ideally)

Step 4: Prepare meeting material:

Printed CMA of property

Printed old MLS sheet (when they bought)

Printed current county tax record

Printed All About You Form (blank if not completed previously)

Printed Annual Review Form to complete on call

Step 5: Confirm meeting via text the day before meeting