CLIENT WELCOME PACKET

Here's everything you need to know about working with me.

Crystal Hill



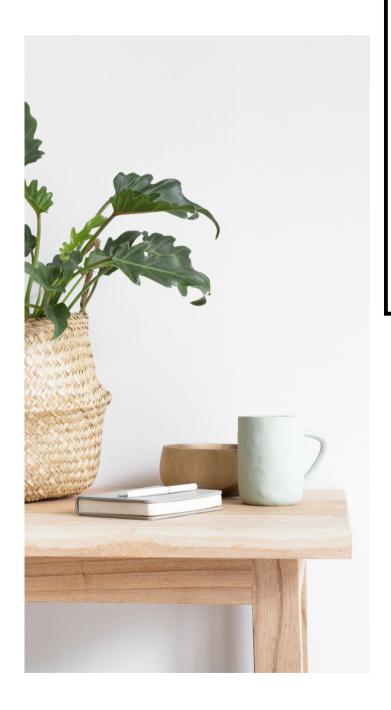
IT'S NICE TO MEET YOU!

I'm so excited to work together.

JUST A FEW THINGS I WANT YOU TO KNOW...

Real estate can be overwhelming and stressful. There are many milestones and numerous parties are involved with buying and selling. Timing and communication are keys to our success.

We will design a personalized action plan for your needs. LET'S DIVE IN!



TIMELINE & MILESTONES

Here's what you can expect & when.

Welcome Meeting

Meet for your
Buyer/Seller consultation,
set expectations, connect
with a local lender if
needed and personalize a
plan.

Make or Accept an Offer

Sellers we will sit down,
Zoom, or call and review
the home offers. Or for
our buyers we will meet
to write up the offer you
want to make on the
home. If our offer is
Accepted, Then we move
on to the Transaction
timeline.

Closing

We made it! We will meet at the closing table to sign the final documents and exchange the keys once the title changes. Congratulations!!!

Home Search

This is where we start searching for your new home! Might be quick, or it might take some time.

Earnest money deposit, Inspections& Appraisal

~ Earnest money is Due from the buyer to the Title Co within 3 business days of offer being Accepted.

~Inspections for the buyer must be completed, and any repair requests submitted before 10 business days to the sellers. This milestone can make or break the transaction. Don't panic though! That is what I am here to help coordinate. ~Appraisal is ordered by the lender if

Appraisal is ordered by the lender i financing the home.

WHAT CAN YOU EXPECT?

My commitment to you.



Do my very best to ensure exceptional service to my Client.



Act as fiduciary representatives for you, keeping all personal information confidential. Suggest financing options and refer to competent lenders as needed..



Assess market value of homes, research comparable sales. Strategize, prepare and negotiate all offers and contract documents providing the maximum investment value for the Client.



Advise and negotiate any inspection issues and remedies.

Coordinate closing details and ensure compliance with offer details.



Communicate at a high level. Respond to all inquiries in a timely fashion.

WHAT I'LL NEED FROM YOU

Your commitment to me.



Be honest and truthful of home desires and needs.



Obtain lender pre-approval at the beginning of the real estate process.



Communicate issues, questions and concerns in a timely fashion.



Inform builders, for sale by owners, and other Real Estate Agents at open houses that you are working represented by a Realtor. Allow your Realtor to contact builders and for sale by owners on your behalf.



Provide any needed documents or information to your Realtor in a timely manner.





MY TRUSTED LENDERS

Loans on Property and Homes:

LARRY URBANSKI

Movement Mortgage larry.urbanski@movement.com 503-624-1513

JUSTIN THERRIEN

Value Added Mortgage 503-890-9778 justin@valueaddedmortgage.com

BRIGITTE ERICKSON

Advantage Mortgage brigitte@findtheadvantage.com 503-282-1882

PAIGE JONES

Cascade Northern Mortgage Paigejonescnm@gmail.com 503-705-7659

BRENDA TINJUM

Mortgage Express, LLC 1396 Powell Blvd Gresham, OR Btinjum@mtgxps.com 503-701-3917

BEVERLY LIESY

Caliberhomeloans.com beverly.liesy@caliberhomeloans.com 503-475-8125

Manufactured Lending Officers:

LISA MCCORMICK

Cherry Creek Mortgage CO 503-931-2185 Lmccormick@ccmclending.com

JOY WILLIAMS

21st Mortgage joywilliams@21stmortgage.com 800-955-0021 x 1200

MELISSA TIPPEY

Advantage Mortgages 503-881-4401 tippey@findtheadvantage.com

FAST MOBILE HOME LOANS

www.fastmobilehomeloans.com info@fastmobilehomeloans.com 1-877-365-3376

RYAN BALDING

Manufactured Loan rbalding@manufacturedhome.loan 973-983-5626

STEVE DEAL

Manufactured Home Loans rbalding@manufacturedhome.loan 973-983-5626

Tell me about YOU!

Name:

Current Address:

Phone: Email:

Do you: OWN RENT If rent, when is the lease up?

Do you have to sell before buying? YES NO

Tell me about your loan:

Lender/Bank:

Loan Officer Name:

Type of Loan:

Time Frame to Buy:

30 Days or Less 30-60 Days 60 Days-1 year 1 Year +

How do you like to communicate?

Phone Calls Text Messages Email Messenger

READY TO GET GOING?

I want to know what you're looking for!

WHY DO YOU WANT TO OWN A HOME?

My dream is to own a homeBecause I'm getting married	To have a place to raise a familyTo be in a specific school district
Tired of paying rent	To have an investment property
☐ Need more space	Other, please specify
TELL ME ABOUT THE	HOME YOU WANT!
1. What part of town (or co	ountry) do you want to live in?
	e would you consider? but no more than \$
	you need to take into consideration (e.g., wan s to be able to walk to school, etc.)?
One sto split level townhou	vould you be willing to see? ry2 storyopen floor plan secondo uctionRanch
contempora farmhous modern 6. How much renovation	e appeals to you most? Irytraditional iecolonial no preference would you be willing to do?
A lot	A littleNone!

CRYSTAL HILL | CLIENT WELCOME PACKET

THE LOT

	MUST HAVE	WOULD LIKE TO HAVE
Large yard (1 acre or more)		
Small yard (less than 1 acre)		
Fenced yard		
2 Car Carport		
2 Car Garage		
3 Car Garage		
4+ Car Garage		
Extra parking		
Patio/deck		
Pool / Pond on site		
Pool / Pond in HOA		
Outdoor Kitchen		
Other buildings (barn, shed, e	etc. <u>)</u>	
Special view of what?		

THE INTERIOR

How many bedrooms must yo	u have? would y	you like to have?
How many bathrooms do you	want?	
How big would you like your h	•	et)?
What features do you want to	o have in your house?	
	MUST HAVE	WOULD LIKE TO HAVE
Carpet		
Tile / Granite		
Hardwood floors		
Standalone Kitchen island		
Separate dining room		
Formal living room		
Family / Bonus room		
Study / Office		
Separate laundry room		
Fireplace		
Crown moldina		





Crystaf Hill

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the MOVING

CHECKLIST.

PREP IN Advance.

- Allocate a budget for your move
- Organize, declutter & clean
- Schedule movers / rental truck
- Make inventory of household items
- Transfer medical records & refill prescriptions
- Get school records & register at new schools
- Arrange time off work / childcare for moving day
- Make a plan for moving vehicles, pets & plants
- Dispose of hazardous & flammable items
- Measure furniture for placement at new home
- Defrost freezer, clean refrigerator & oven

NOTIFY OF UPCOMING MOVE

Essentials:

- Post office
- Employer

Utility & Home Services:

- Gas
- Electric
- Water
- Telephone, internet & cable
- Garbage removal
- Lawn service

Finances:

- Banks & credit unions
- Loan companies

Insurance:

- Homeowner / renters insurance
- Health & dental insurance
- Life insurance
- Car insurance

Government Agencies:

- Tax agencies
- Social Security Administration

Service Providers:

- Doctors
- Dentists
- Veterinarians
- Attorneys
- Accountants
- Subscriptions & memberships

PACK AN OVERNIGHT BAG

- Pajamas & clean clothes
- Toiletries
- Any medications needed
- Towels
- Toilet paper
- Pet food & supplies
- Cell phone charger
- Important documents
- Cash & valuables

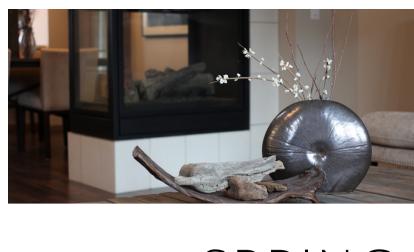
LABEL AN "OPEN FIRST" BOX

- Cleaning supplies
- Light bulbs
- Basic tools
- Paper plates, cups & utensils
- Coffee & snacks
- Hand soap
- Remote controls
- Kids toys

Moving DAY.

- Plan to be home when movers arrive
- Protect floors & carpets
- Contain pets in a safe place during move
- Make sure all boxes are labeled accurately
- Do a final cleaning & dispose of trash
- Take a final walk-through of your home
- Leave owner manuals & household receipts
- Leave labeled keys & garage door openers
- Lock doors, windows & turn off all switches

ontacts:





SPRING

- Clean the Gutters
- Scrub Walls, Baseboards and Outlets
- Replace Filters
- Clean Faucets and Shower Heads
- Clean Out the Dryer Vent
- Check Foundation Vents
- Clean the Grill

FALL

- Drain your Outdoor Faucets
- Fix Driveway or Walkway Cracks
- Change your Filters
- Fertilize your Lawn
- Change your Batteries
- Clean up Leaves

SUMMER

- Inspect Air-Conditioners
- Wash your Windows
- Add a Layer of Mulch
- Primp your Plants
- Wash Down your Porch
- Wash the Windows
- Check for Outdoor Leaks

WINTER

- Check the Roof
- Inspect Insulation
- Reverse Ceiling Fans
- Inspect Fireplace
- Sweep Chimney



I'M SO EXCITED TO WORK TOGETHER

And I can't wait to get started!

