

EMAIL TEMPLATE SUGGESTIONS FOR CLIENT COMMUNICATIONS

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You can save time for yourself and be proactive in providing more details for your clients with proactive emails sent to your clients weekly, especially during the contract to close period. Since all markets are different, I cannot write the template for you, but you can use the lists I have provided to help you know what to discuss. You can write it in paragraph or bullet point form. Remember to always personalize the email you send to the client. Save them in your templates files in Outlook, in your CRM or in Canned Responses in Gmail.

BUYER CONTRACT TO CLOSE EMAIL SUGGESTIONS

Buyer Contract to Close Week 1

- Celebrate – Under contract!
- Send Contract to Buyer
- Inspection coming up – suggested list of inspectors
- Directions to help them schedule the inspector or update on what has already been done.
- Lending situation and requirements – What needs to be done this week.
- Compliance Timeline
- Earnest Money to be deposited or delivered. Give instructions.

Buyer Contract to Close Week 2

- Update on Lender Situation
- Reminder to order appraisal if haven't already
- Update on Inspection situation – Date scheduled and attendance plan
- Discussion about the inspection negotiations
- Termite letter or other standard inspection items in your state
- Friendly reminder to make no major purchases or open or close any credit cards before closing if they are getting a loan

Buyer Contract to Close Week 3

- Status of Loan – work with lender to timely provide any last minute documents they need to satisfy the underwriter
- Status of Inspections
- Status of Appraisal
- Moving Tips
- Prep for closing
- Wire Fraud warning
- www.ProtectYourMove.org

Buyer Contract to Close Week 4

- Preparation for Closing
- Utility information for house they are purchasing
- Wire Fraud Warning
- Closing company contact information and address
- Time of closing reminder
- Any details regarding escrow and funding that are relevant. Explanation about transfer of funds.
- Bring Driver's License and checkbook in case there are minor changes to the Settlement Statement
- Home Warranty information if one was purchased
- Friendly reminder to make no major purchases or open or close any credit cards before closing if they are getting a loan

Post-Closing Email.

- Congratulations
- Watch for Deed and Title Insurance Policy to come in the mail. Keep with important documents.
- Any other tips or reminders
- Request for Testimonial

SELLER CONTRACT TO CLOSE EMAILS

Seller Contract to Close Week 1

- Celebrate – Under contract!
- Send Contract to Seller
- Inspection coming up – any items to help them be prepared
- Make sure all utilities are on and there is clear access to the attic and crawl space.
- Termite, pest, radon or other inspections that may be occurring

- Remind seller to keep the house in show condition until after the appraiser comes.
- Compliance Timeline

Seller Contract to Close Week 2

- Update on Lender Situation
- Update on Inspection situation – Date scheduled and attendance plan
- Seller should not be at the house during the inspections
- Discussion about the inspection negotiations
- Termite letter or other standard inspection items in your state
- Discuss appraisal if appropriate
- Tell the Seller to contact the Title company and to give them mortgage information and SSN for those on the loan for payoff. Include Title Company contact information.

Seller Contract to Close Week 3

- Status of Loan
- Status of Inspections
- Status of Appraisal
- Moving Tips
- Prep for closing
- Wire Fraud warning
- Reminder about keeping up with repairs and do they need any vendor suggestions.
- www.ProtectYourMove.org

Seller Contract to Close Week 4

- Preparation for Closing
- Reminder to tell Utility companies to transfer, not discontinue service.
- Wire Fraud Warning
- Closing company contact information
- Time of closing reminder
- Any details regarding escrow and funding that are relevant.
- Bring Driver's License and any extra keys or garage remotes to closing.

Post-Closing Email.

- Congratulations
- Any other tips or reminders
- Request for Testimonial