

Buyer Consultation Checklist

Complete at or before the buyer consultation

BEFORE THE CONSULTATION

Confirm pre-approval status — call lender directly if needed

Do not rely solely on the buyer. Call the lender to verify amount and timeline.

CRITICAL

Pull active inventory stats for their target area and price range

Average DOM, list-to-sale ratio, number of active listings. Buyers need market context.

HIGH

Review lead source notes and any prior conversations

Know their story before they sit down. What brought them in?

HIGH

Prepare Buyer Rep Agreement pre-filled with name, area, and term

Have it ready. Signals professionalism and commitment to the process.

CRITICAL

Send pre-consultation confirmation with agenda and what to bring

Pre-approval letter, IDs, any loan documents. Sets expectations.

STANDARD

DURING THE CONSULTATION

Cover full buying process step by step — pre-approval to closing

Pre-approval, search, offer, option, inspection, appraisal, closing. No surprises.

CRITICAL

Explain buyer representation and Texas agency relationships

Texas requires disclosure of agency relationships. Cover IABS form.

CRITICAL

Present and sign Texas Buyer Representation Agreement

Term, geographic area, compensation. Frame as protection for both parties.

CRITICAL

Complete full needs analysis — must-haves, dealbreakers, timeline

Must-haves, nice-to-haves, dealbreakers, motivation, timeline, decision makers.

CRITICAL

Discuss earnest money, option period, and closing cost estimates

Set realistic financial expectations before they fall in love with a home.

HIGH

**Set up HAR MLS auto-search alert matching their exact criteria**

Immediate alerts for hot markets. Confirm their email address.

HIGH**AFTER THE CONSULTATION****Add buyer to GHM CRM with full profile — budget, area, timeline, notes**

Tag appropriately. Set follow-up tasks based on their timeline.

CRITICAL**Send recap email with process summary and next steps**

Brief bullet list. Confirms what was discussed and what happens next.

STANDARD**Refer to lender if not yet pre-approved — follow up within 48 hours**

Stay in the loop with the lender. Know when the pre-approval comes through.

HIGH**Notes**