



Getting Started

Basic Information

Name _____

Phone _____ Birthday _____

Email _____

Name _____

Phone _____ Birthday _____

Email _____

-Who is the primary contact and what is the best time and way to reach that individual?

-What is prompting your move?

-When do you need to be in your new home?

-Are you pre-approved for a mortgage?

-What is your price range?

-If we found a home today that meets all of your needs and as many of your wants as

possible, would you make an offer?

COMPASS



Lifestyle

- Who will be living in the home you purchase?
- Will anyone else be spending more than an occasional overnight stay (e.g., parents)?
- Describe your lifestyle. What do you enjoy doing at home? Do you do a lot of entertaining? How do you spend your time in the evenings and on the weekends?
Does your home need to accommodate any special needs?
- Do you have any pets?
- Do you have anything special that needs to be accommodated such as athletic equipment, fine art, large furniture or a large collection?
- Is there anything I should know about your lifestyle that I have not asked?

Location

- Tell me about your ideal location.
- What is your maximum commute time and distance?
- What is your work address?
- Are schools important?
- Is there a particular view you are seeking (e.g., skyline, lake, mountains)?
- What else is important about your location?

COMPASS



General

- Do you have a preference for when the house was built?
- Do you want a house in move-in condition or are you willing to do some work on it?
- When people come to your home, what do you want your home to say about you?
- Do you want to have a swimming pool or hot tub?
- Are you looking for any structures such as a greenhouse or shed?

Structure/Exterior

What type of home are you looking for (e.g., single-family, condo, town house, etc.)?

Approximately what size house are you looking for (square footage)?

How many stories?

What size lot would you like?

What architectural styles do you prefer?

What type of exterior siding will you consider?

Do you want a porch or deck?

What are you looking for in terms of a garage (e.g., attached, carport, etc.)?

What other exterior features are important to you?

COMPASS



Summary

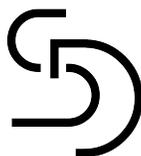
What are the top five things your home needs to have?

Beyond those five things, what is something else you really want to have?

If you could have something else, what would that be?

If you could have one last thing to make this your dream home, what would that be?

COMPASS



Frequently Asked Questions

How will you tell me about the newest homes available?

The Multiple Listing Service Website provides up-to-date information for every home on the market.

I constantly check the New on Market list so I can be on the lookout for my clients. I will get you this information right away, the way that is most convenient for you: by phone and/or email.

Will you inform me of homes from all real estate companies or only Douglas Elliman listings?

I will keep you informed of all homes. I want to help you find your dream home, which means I need to stay on top of every home that's available on the market.

Can you help me find new construction homes?

Yes, I can work with most builders and get you the information you need to make a decision. On your first visit with the builder, I will accompany you. By using my services with a new construction home purchase, you will receive the services I offer, as well as those provided by the builder, at no additional cost.

COMPASS



Frequently Asked Questions (continued)

How does for sale by owner (FSBO) work?

Homeowners trying to sell their home without agent representation are usually doing so in the hopes of saving the commission. If you see a FSBO and want the advantages of my services, let me contact the owner for you and make an appointment. Most times the homeowner will work with an agent even though their home is not listed, since the agent is introducing a potential buyer to their property.

Can we go back through our property again once an offer is made but before possession?

Usually, we can notify the seller and schedule a convenient time to visit the property again. Immediately before the closing, we will schedule a final walk-through and inspection of your new home.

Once my offer is accepted, what should I do?

Celebrate and focus on moving into your new home! You will want to schedule your move, pack items and notify businesses of your address change. I will provide you with a moving checklist to help you remember all the details. I will also give you a good faith estimate and HUD statement, which will indicate the amount you will need to bring to closing.

COMPASS



BUYER CONSULTATION

COMPASS



Who is Dan Santiago?



While Dan Santiago is a relatively newly minted real estate professional, having earned his Bachelor's Degree in Business Management in 2016 from Wilmington University in Delaware, Dan has long had a fascination with and passion for the business, dating to his teenage years, from design and preconstruction, through to experiencing a beautiful home firsthand, and every aspect of the process of buying and selling. Dan, who speaks both English and Spanish, is highly motivated by the trust his clients place in him, and will make himself available whenever and however he needs to in

order to make the transaction a reality, and make it as easy and fulfilling as possible.

Dan is optimistic that South Florida will continue to be a prime destination for real estate, desirable for residents and investors alike. Compass provides Dan, and consequentially his clients, with access to top technology and marketing strategies, to great mutual benefit. Dan is a hard worker who displays a clear confidence and fun-loving spirit that put clients at ease and make for an enjoyable collaboration. Happy to call South Florida home, Dan takes time to return home to New Jersey to visit loved ones, and otherwise spends his personal time networking, playing basketball, swimming and going to the gym, and going to restaurants.

COMPASS



CONTACTS & RESSOURCES **

MORTGAGE

Anthony Garcia - Primary Residential Mortgages
786.586.0492 | agarcia@primeres.com

REAL ESTATE LAW & TITLE

Natalie Zagury Scott - Zagury Scott PA
954.817.5982 | natalie@zaguryscottpa.com

HOME INSPECTIONS

Nelson Ruiz-Moya - Infinity Home Inspections
786.400.0570 | inspector@infinityinspector.com

HOME INSURANCE

Ludys Perez - Best Option Insurance
305.962.9273 | ludys@bestoptioninsurance.net

OTHER

Please advise if you need any help with: Interior Design, Information & Technology, Life & Disability Insurance, Social Media Marketing, Architecture, General Contracting, Roofing, Land Surveying, Law (Probate, Estate Planning, Family, Criminal, Immigration, Business etc.) and more.

***These are solely recommendations based on personal experience. Any vendor is welcomed to work with us.*

COMPASS