

BUILDING HOME OWNERSHIP DREAMS

List of Advisors



Guide for helping clients
build their List of Advisors



List of Advisors Guide

What:

The list of advisors is a collection of names of companies and their contact information that helps home buyers have a single document to go to when they have home needs they need to address.

Why:

The List of Advisors helps to provide home owners with confidence and gives them a plan for whatever arises in their buying process or homeownership process. If something comes up on a walk-through, you have a guy for that. Issues arise in an inspection, you already have an advisor identified for that. Finally, the List of Advisors serves as a boundary for where you'll get information whenever needed. If you start getting opinions from outside of that network (i.e. Google, YouTube, your crazy uncle, or that guy at work) it helps keep you rooted in your plan—because when you fill this out, you have a plan.

When:

The optimal time for building your List of Advisors is before a you start looking at properties. It provides the buyer and their agent an opportunity to understand what connections are available and who you'll invite influence the purchase process. If there's a respected individual that is on the list it is important to know that from the start. Invite them to attend several showings in the process so the advisor understands the context of the home conditions in your price point.

How:

Now that you understand the reason for the List of Advisors, go through each category and identify who you have as a contact for each need. If the buyer doesn't have a contact ask the agent if they have a recommendation.

When you get to "Other Advisors," specifically consider if there are family members you'd like to include on the list. If so, be sure to have them come go on some of the showings with you so they can understand property conditions at this price point.



List of Advisors

Our commitment to you is to have a plan for whatever comes our way for home buying and homeownership. To help with that we want to start by establishing a list of our *Team of Advisors*. This list will come in handy as we look at a property, have inspections, need other expert opinions, and even when you have home maintenance issues in the future.

I have great referrals for you in each of these categories. Let's go through them and build your list of the people you may want to help you in this process.

	Name:	Phone:		Name:	Phone:
Lender:	_____	_____	Flooring:	_____	_____
Insurance:	_____	_____	Interior Design:	_____	_____
Realtor:	_____	_____	Windows:	_____	_____
Inspections:	_____	_____	Garage Doors:	_____	_____
Roofer:	_____	_____	Sprinkler:	_____	_____
Plumber:	_____	_____	Lawn Care:	_____	_____
Electrician:	_____	_____	Tree Care:	_____	_____
Radon Mitigation:	_____	_____	Chimney Sweep:	_____	_____
HVAC Tech:	_____	_____	Other Advisors:	_____	_____
Wood Rot:	_____	_____	Other Advisors:	_____	_____
Pest Control:	_____	_____	Other Advisors:	_____	_____
Painting:	_____	_____	Other Advisors:	_____	_____
Landscaper:	_____	_____	Other Advisors:	_____	_____

We have a plan and have built a team to help you accomplish your homeownership goals. We have now assembled our List of Advisors available to us as we navigate this journey. Let's work with this team to make great things happen for your future.

