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Buyer FLEX Email UC 1



shared by **Mike Schneider**

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STAGE CHANGED

Under contract



CONDITIONS

Buyer Close Date is not em...

Client Type

Buyer Attorney is not empty

Buyer Attorney Phone is no...

Buyer Contract Address is ...

Buyer Binding Date is not e...

Buyer D D Ends is not empty

Buyer E M Amount is not e...

Buyer E M Due is not empty

Buyer Finance Cont Ends is...

Buyer Appraisal Cont Ends ...

T Buyer Close Date is not em...

T Buyer Client Type



ACTION PLAN

Start **Buyer Under Contract**



COMPLETED

Run multiple times per person

Buyer Under Contract Action Plan



Hi %contact_first_name%,

Congratulations! 🎉

I'm thrilled to celebrate this exciting moment with you—your offer has been accepted, and you are officially under contract for your new home! This is a significant step toward achieving your dream, and I couldn't be happier for you.

Time is of the Essence

As we move forward, remember that **"Time is of the Essence."** This highlights the importance of acting promptly as we navigate the next steps of your home purchase. Staying mindful of key deadlines will help keep the process smooth and on track. Here are some important dates to note.

Contract Binding Date: %custom_buyer_binding_date%

Earnest Money Due: %custom_buyer_em_due%

Due Diligence Ends: %custom_buyer_dd_ends%

Appraisal Contingency Ends: %custom_buyer_appraisal_cont_ends%

Finance Contingency Ends: %custom_buyer_finance_cont_ends%

Close Date: %custom_buyer_close_date%

What's Next?

In just a few hours, you'll receive another email from me with important details on how to submit your Earnest Money. This step is essential in solidifying your commitment to the purchase, and I'll guide you through it.

Your closing attorney for this transaction will be %custom_buyer_attorney%. You can reach them at %custom_buyer_attorney_phone% if you have any legal questions about the process.

If you have any questions or need assistance at any point, don't hesitate to reach out. I'm here to support you every step of the way!

Once again, congratulations on this wonderful milestone! I look forward to helping you make your new house a home.

All the best,



Hi %contact_first_name%,

As we continue your home purchase journey, it's crucial to remember that time is of the essence. We need to complete all inspections and negotiations within the due diligence period which ends %custom_buyer_dd_ends%. With this in mind, let's focus on a critical step: the home inspection.

Choosing Your Inspector

You have the freedom to choose any licensed home inspector you prefer. If you'd like, I can provide you with recommendations for quality inspectors in the area. Just let me know, and I'll be happy to assist!

What the Inspection Includes

A comprehensive home inspection will evaluate:

- Structural components
- Exterior and interior features
- Roofing system
- Plumbing and electrical systems
- Heating and cooling systems
- Insulation and ventilation
- Doors, windows, and visible insulation

Remember, an inspection provides an opinion of the home's current condition. It's not a pass/fail test, nor is it a mandatory repair list.

Using the Inspection Report

The inspection report will help you:

- Understand the property's condition
- Identify potential issues or necessary maintenance
- Make informed decisions about the purchase

We can use this report to negotiate fair repairs with the seller if significant issues are found.

However, keep in mind that sellers are generally not obligated to make all repairs.

Next Steps

Your next steps are to schedule the inspection as soon as possible, ideally within the next couple of days. This will give us ample time to review the report and negotiate any necessary repairs before the due diligence period ends. I recommend you attend the post inspection walk through if possible, as it's an excellent opportunity to learn about your new home. After the inspection, we'll review the report together and discuss any necessary actions.

Remember, I'm here to guide you through this process and answer any questions. Don't hesitate to reach out if you need assistance or have concerns about the inspection.

Looking forward to helping you take this important step towards homeownership!
All the best,



%contact_first_name%, Congratulations again!

The next step in the buying process is to secure the earnest money deposit. For your protection, time is of the essence.

Earnest Money is due by %custom_buyer_em_due%.

For your convenience, %company_name% provides electronic transfer at NO COST to you.

Please use %company_name%'s secure [Earnest Money site](#) to submit your deposit.

You will need:

- First Name, Last Name (%contact_first_name%, %contact_last_name%)
- Billing Address
- Email Address (optional but needed for receipt emailed directly)
- Bank Name
- Bank Routing & Account Number
- Type of Account (checking or savings)
- Atlanta Communities Agent Name & Office (%agent_name%, %custom_ac_agent_office%)
- Subject Property Address: %custom_buyer_contract_address%
- Amount of Earnest Money \$%custom_buyer_em_amount%

If you prefer to submit your deposit via paper check, you may deliver it to ANY %company_name% office. Please note in the memo line:

EM %custom_buyer_contract_address% "Agent:

%agent_name%, %custom_ac_agent_office%." Please note, only certain office have night deposit boxes to accept after hours payments.

My office will notify me during business hours once your Earnest Money deposit is received, and I will promptly update all parties involved. If you happen to submit the deposit outside of business hours, please send me a quick text to keep me in the loop.

PLEASE BE ADVISED THAT I WILL NOT SHARE ANY SETTLEMENT AGENT WIRING INSTRUCTIONS VIA EMAIL. NO EMPLOYEE, OFFICER OR AFFILIATE OF ATLANTA COMMUNITIES WILL EVER INITIATE A TELEPHONE CALL TO YOU TO OFFER WIRING INSTRUCTIONS. COMMON WIRE FRAUD SCHEMES AND THEFT OF WIRED FUNDS INVOLVE USE OF SIMILAR EMAIL ADDRESSES AND HACKED ACCOUNTS. IF YOU RECEIVE AN EMAIL OF WIRING INSTRUCTIONS FROM "ME" OR ANY "ATLANTA COMMUNITIES" EMPLOYEE OR EMAIL ADDRESS, DO NOT INITIATE A FUNDS TRANSFER AND CONTACT ME PERSONALLY IMMEDIATELY FOR VERIFICATION. Neither I, nor Atlanta Communities, is responsible for any wires sent by you to an incorrect bank account. ALWAYS confirm the proper wire instructions by calling the Settlement Agent's office using a phone number you find from an independent source, such as the internet, NOT the phone number at the bottom of an email that contains any wire instructions.



Delay 2 days



Hi %contact_first_name%,

I hope you're doing well and staying excited about your new home! As we move forward, it's important to focus on securing your mortgage to help ensure a smooth closing process. Please keep in mind the Finance Contingency ends: %custom_buyer_finance_cont_ends%

Contact Your Lender

I have provided a copy of the contract to your lender. If you haven't connected with them since going under contract, now is a great time to reach out. They will need to start processing your loan application and may require additional documentation from you.

Common Documents Needed

While your lender will provide a specific list, here are some documents typically required:

Recent pay stubs (usually last 30 days)

W-2 forms from the last two years

Federal tax returns from the last two years

Recent bank statements (usually last 60 days)

Proof of other income sources (if applicable)

Photo ID

Important Reminders

Respond promptly to any requests from your lender

Avoid making large purchases or opening new credit accounts

Don't change jobs if possible, as this can complicate the loan process

Loan Commitment

Your lender is working to provide a loan commitment

before %custom_buyer_finance_cont_ends%. Meeting this deadline is essential to keep your purchase moving forward and help protect your earnest money.

Questions or Concerns?

If you have any questions about the mortgage process, please don't hesitate to reach out.

Remember, your financing addendum contains specific lender information. If you have any concerns about your current lending options, please call me immediately to discuss. We want to ensure we're adhering to the terms of the purchase contract and protecting your Earnest Money by approaching any changes in the correct manner.

Remember, securing your financing is a critical step in your home buying journey. Let's work together to keep everything on schedule!

All the best,



Dear %contact_first_name%,

In today's digital age, wire fraud is a growing concern in real estate transactions, and I want to ensure you are fully informed and protected. It's crucial to be aware of the tactics used by scammers and take proactive steps to safeguard your funds. Please take a moment to read through this important information.

Wire Fraud Alert

Criminals are targeting real estate transactions with sophisticated email scams. They may pose as your realtor, title company, lender or closing attorney to trick you into wiring funds to fraudulent accounts.

How to Protect Yourself

Never Trust Email for Wire Instructions: Regardless of how official an email looks, never trust wire instructions sent via email.

Always Verify by Phone: Before sending any wire transfer, call the closing attorney's office directly using the number I provide below. Do not use phone numbers from an email.

Be Suspicious of Changes: If you receive any communication about last-minute changes to wire instructions, be extremely cautious. This is a common tactic used by fraudsters.

Confirm Receipt: After sending a wire transfer, call the closing attorney's office to confirm they received it.

Closing Attorney Contact Information

Name: %custom_buyer_attorney%

Phone: %custom_listing_attorney_phone%

Remember: I will never send you wire instructions via email. Always call to verify before sending money.

If you suspect you've been targeted by wire fraud, contact your bank immediately to try to recall the wire, and report the incident to the FBI's Internet Crime Complaint Center at ic3.gov.

Your safety is my utmost concern. If you have any questions or concerns, please don't hesitate to contact me directly.

All the best,



Delay 1 day



Hi %contact_first_name%,

I hope this email finds you well. As we continue progressing through your home buying journey, it's time to discuss another crucial step: the home appraisal.

What is a Home Appraisal?

A home appraisal is an unbiased professional opinion of a home's value. It's typically required by your lender to ensure that the property is worth at least as much as the amount they're lending.

The Appraisal Process

Your lender will order the appraisal.

A licensed appraiser will visit the property.

The appraiser will compare the home to similar properties recently sold in the area.

A detailed report will be prepared, usually within 3-7 business days.

What You Need to Know

The appraisal is typically scheduled to be completed by the appraisal contingency deadline (%custom_buyer_appraisal_cont_ends%) as outlined in the contract.

You don't need to be present for the appraisal.

The cost of the appraisal may be included in your closing costs, but some lenders ask that it is paid for upfront.

Possible Outcomes

Appraisal matches or exceeds the purchase price: Great news! We can proceed as planned.

Appraisal comes in low: Don't worry. We have options:

Negotiate with the seller for a lower price

Challenge the appraisal if we believe it's inaccurate

You can opt to pay the difference out of pocket

In some cases, we might need to renegotiate the contract in its entirety

Next Steps

At this point, you don't need to take any action regarding the appraisal. Your lender will handle ordering it, and will keep you updated on the results. If you have any questions about the appraisal process or any other aspect of your home purchase, please don't hesitate to reach out.

I'm here to guide you every step of the way.

All the best,



Delay **2 days**



Dear %contact_first_name%,

As we continue moving forward with your home purchase, I want to discuss a critical aspect of protecting your investment: **title insurance**.

Why I Strongly Recommend Title Insurance

As your REALTOR®, I always advise my clients to obtain title insurance. Here's why:

Protection Against the Unknown: Even with a thorough title search, some issues can remain hidden. Title insurance safeguards you against unforeseen problems that could jeopardize your ownership.

One-Time Cost, Lifetime Protection: You pay for title insurance only once at closing, but it protects you for as long as you (or your heirs) own the property.

Financial Safety Net: If a covered title issue arises, your policy can cover legal fees and, if necessary, reimburse you up to the full value of your home.

Peace of Mind: Knowing you're protected allows you to enjoy your new home without worrying about potential title disputes.

Lender's Requirements and Your Loan Estimate

If you're financing your purchase, your lender will almost certainly require you to pay for a lender's title insurance policy as part of your closing costs. This policy protects the lender's interest in your property.

You may have noticed that your initial Loan Estimate from the lender likely included the estimated cost for both the lender's title insurance and the buyer's (owner's) title insurance. This gives you a good idea of what to expect for these costs at closing.

However, it's crucial to understand that the lender's policy does not protect you. That's why I recommend you also purchase an owner's title insurance policy to safeguard your own investment.

Next Steps

Review Your Loan Estimate: Look for the line items for both lender's and owner's title insurance.

Consider Owner's Title Insurance: Your lender can help you understand the benefits and explore options for purchasing an owner's policy.

Ask Questions: If you have any concerns about title insurance or the estimated costs, please don't hesitate to reach out. I'm here to help you make informed decisions.

Protecting your investment is my top priority, and title insurance is a crucial part of that protection.

I'm here to guide you through this process and ensure you have the coverage you need.

All the best,



Add tag(s): **movetobucdrip2**



Preston Guyton

Broker/Owner, CRG Companies



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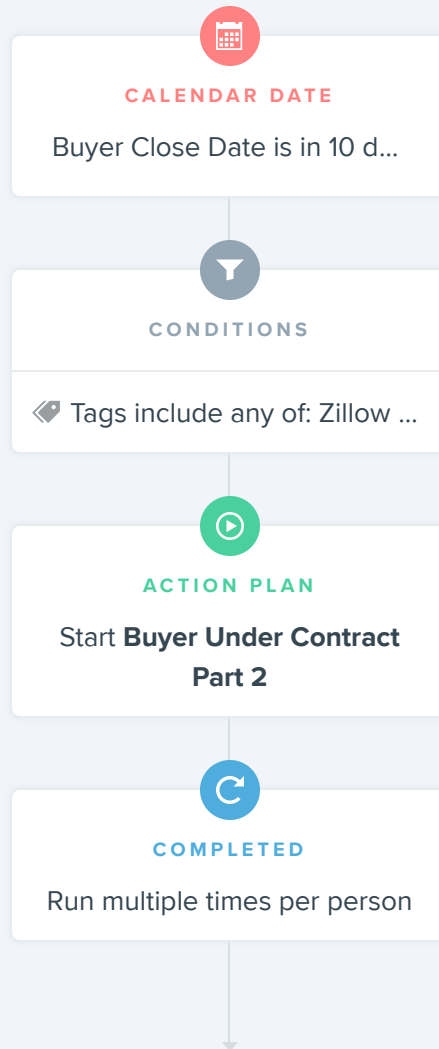
Buyer Flex Email UC 2 - 7 Days Before Close



shared by **Mike Schneider**

Use Automation

Start automation when any of these events occur



Buyer Under Contract Part 2 Action Plan



Hi %contact_first_name%,

As you prepare for your upcoming move, it's crucial to update your address with various organizations and services. To help you stay organized, I've created this comprehensive checklist. Feel free to check off each item as you complete it.

Financial Institutions

- Banks and Credit Unions
- Investment Companies
- Car Loan Providers
- Mortgage Companies
- Student Loan Servicers
- Credit Card Companies
- PayPal, Cash App, Venmo, and Other Online Payment Providers
- Lender of Previous Home (if applicable)

Government Agencies

- United States Postal Service (USPS)
- Internal Revenue Service (IRS)
- Social Security Administration
- Department of Motor Vehicles (DMV)
- Voter Registration Office

Employment

- Current Employer's HR Department
- Former Employers (for W-2s and other tax documents)

Insurance Providers

- Health Insurance
- Car Insurance
- Life Insurance
- Homeowner's/Renter's Insurance

Utilities and Services

- Electricity Provider
- Gas Company
- Water and Sewer Service
- Internet Service Provider
- Cable or Satellite TV Provider
- Cell Phone Company

Online Services and Subscriptions

- Amazon
- eBay
- Netflix
- Hulu

Spotify

Other Online Merchants

Personal Contacts

Friends and Relatives

Doctors and Dentists

Schools

Clubs and Organizations

Accountants

Realtor 😊

Miscellaneous

Landlord (if applicable)

Subscription Services (magazines, newspapers)

Pet Microchip Registry

Alumni Associations

Charitable Organizations

Remember, many organizations allow you to update your address online, making the process quick and easy. If you're concerned about missing any important mail, consider setting up mail forwarding with the USPS for a period of time after your move.

If you need any assistance or have questions about your move, please don't hesitate to reach out.

Good luck with your address updates!

All the best,

"Follow Up Boss is a big reason why we have been able to double our sales every year since 2015."



Preston Guyton

Broker/Owner, CRG Companies



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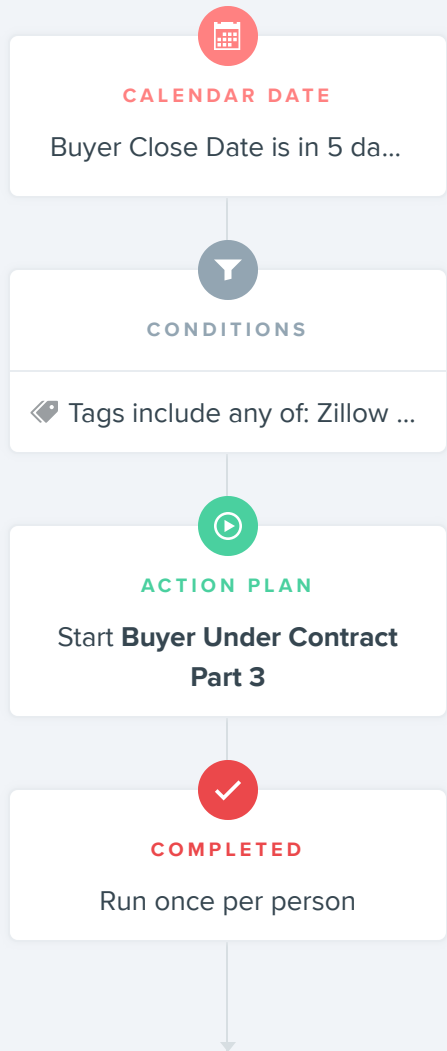
Buyer FLEX Email UC 3 - 3 Days Before Close



shared by **Mike Schneider**

Use Automation

Start automation when any of these events occur



Buyer Under Contract Part 3 Action Plan



Hi %contact_first_name%,

As we approach your closing date, it's important to be well-prepared. Below is a checklist to help you get ready for closing day and ensure a smooth process.

Your Closing Checklist

Review Closing Documents:

Ensure you have received and reviewed the Closing Disclosure (CD) at least three days before closing. This document outlines the final terms of your loan and all closing costs.

Bring Necessary Identification:

Bring a government-issued photo ID (like a driver's license or passport) to the closing.

Prepare Your Funds:

Confirm the amount you need to bring for closing costs and down payment. Funds over \$5,000 typically need to be wired no later than 1 business day prior to closing. Remember to verify wire instructions to avoid fraud.

Bring a blank check to closing just in case there are any minor adjustments made at the closing table.

Schedule a Final Walk-Through:

We will schedule a walk-through ideally just before closing to ensure everything is in order and any agreed-upon repairs have been completed.

Understand Your Closing Costs:

Familiarize yourself with the various fees included in your closing costs, such as title insurance, attorney fees, and escrow fees. If you have questions, feel free to ask!

Know What to Expect on Closing Day:

Arrive at the closing location on time. Expect to spend about 1-2 hours reviewing and signing documents.

You will be signing the mortgage note, deed of trust, and other necessary documents.

Ask Questions:

If you have any questions during the closing process, don't hesitate to ask your closing attorney or me. I am here to help!

What to Expect on Closing Day

Signing Documents: You will sign various legal documents necessary to finalize the purchase.

Payment of Closing Costs: You will provide the necessary funds for closing costs and down payment.

Receiving Keys: Once all documents are signed and funds are transferred, you will receive the keys to your new home!

Final Thoughts

This is an exciting time, and I'm here to support you every step of the way. If you have any questions or need clarification on any aspect of the closing process, please reach out to me.

Looking forward to celebrating this milestone with you!

All the best,

"Follow Up Boss is a big reason why we have been able to double our sales every year since 2015."



Preston Guyton

Broker/Owner, CRG Companies



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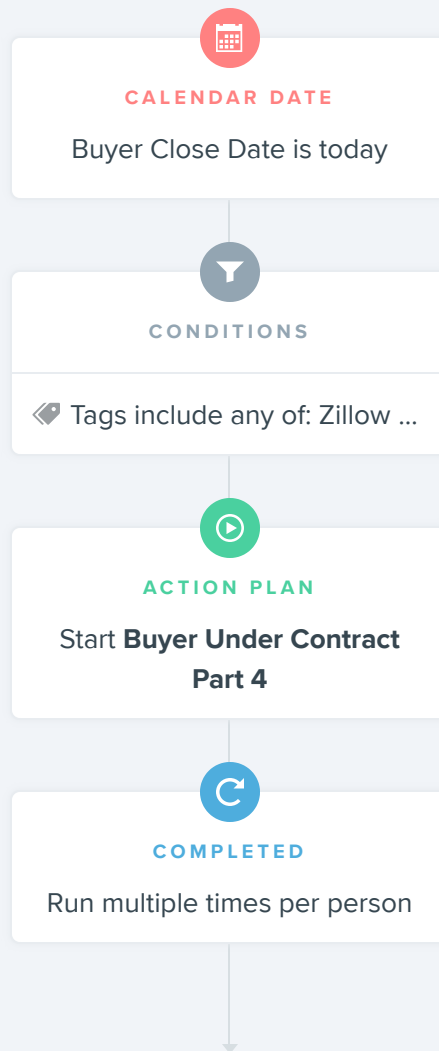
Buyer Flex Email UC 4 - Day of Closing



shared by **Mike Schneider**

Use Automation

Start automation when any of these events occur



Buyer Under Contract Part 4 Action Plan



Dear %contact_first_name%,

🎉 Happy Closing Day! 🎉 The day you've been waiting for is finally here! It's time to celebrate your journey toward homeownership, and I couldn't be more excited for you!

Final Reminders for Your Big Day

Double-Check Your Documents:

Make sure you have your government-issued photo ID and any other required documents ready to go. It's always good to have a backup copy of your Closing Disclosure, just in case!

Arrive on Time:

Punctuality is key! Arrive at the closing location a little early to settle in and get ready for the festivities.

Verify the Wire Transfer:

Before heading to closing, confirm that your wire transfer has gone through. This ensures that everything is in order for the big day!

Bring a Blank Check:

Bring a blank check just in case any last-minute fees come up. It's always better to be prepared!

Celebrate Your New Home:

Don't forget to bring your excitement! This is a huge milestone, and you deserve to celebrate. Whether it's a small gathering or a big party, make sure you plan something fun for after the closing!

Ask Questions:

If you have any questions during the closing process, don't hesitate to ask your closing attorney or me. We're here to make this as smooth as possible for you!

What to Expect Today

Signing Celebration: You'll be signing a stack of documents, but don't worry—it's all part of the fun! Each signature brings you one step closer to owning your new home.

Receiving Keys: Once everything is signed, and the funds are transferred, you'll receive the keys to your new home! 🎉🔑

Take a Moment: After the closing, take a moment to soak it all in. You're officially a homeowner! Thank you for allowing me to be a part of your home-buying journey. If you need anything today or in the future, don't hesitate to reach out. I'm here for you!

Cheers to new beginnings! 🥂

Use Automation

"Follow Up Boss is a big reason why we have been able to double our sales every year since 2015."



Preston Guyton

Broker/Owner, CRG Companies