

Presentation Guidelines

As Windermere agents our primary concern is our client's best interest. The following Guidelines are intended to clarify and improve that process as it relates to presenting offers. The Guidelines address two key elements:

- How we keep our client's best interest in mind when presenting offers
- How to work with the real estate professional representing the other party

General Guidelines:

1. Create realistic expectations; educate your client on how the process works and their basic options which generally are:
 - A. For the Buyer's agent to present the client's offer to the seller in person in the presence of the listing agent.
 - B. For the listing agent to present the offer rather than the selling agent when the seller is part of a relocation package, is ill, or the property is part of an estate, etc.
2. Be familiar with and follow your MLS rules for contacting sellers and presenting offers. Personally contact the listing agent as soon as an offer has been signed. Contact the seller only as a last resort and only as long as you have followed your MLS or other legal or ethical guidelines.
3. Regardless of whether you represent the buyer or the seller:
 - A. Have all relevant paperwork available at the presentation such as seller disclosure forms, lead based paint forms, preliminary title, septic as-builts, septic and well information, etc.
 - B. It is recommended that buyer's agent provide as many copies of the offer, copy of the earnest money check, lender approval letters and any written information on the buyer's background as necessary to make sure that everyone present has their own copy.
4. It is the philosophy of Windermere that all offers are presented in person. Faxing of offers is discouraged.

Restrictions:

It is in the best interest of the client to allow buyer's agents to present their own offers

- The Seller's agent should not post restrictions unless necessary.
- The Buyer's agent has the right to verify that any restrictions shall conform to MLS rules. If they have, it is the buyer's agent's responsibility to respect these restrictions as written.

Benefits to Having Buyer's Agents Present Their Own Offers

1. Benefits to the Buyer and Seller

Better communications lead to more successful negotiations because:

- A. Most communication is non-verbal. Body language, tone of voice and nuances of the negotiating process cannot be faxed.
- B. The reasons why an issue is important is critical to a better understanding between the parties.
- C. It improves the opportunity to provide important supporting details such as flexibility in timelines for inspections, closing, etc.
- D. The risk of miscommunication is lowered when all the parties are present to ask and answer questions, clarify intent, etc.

2. Additional Benefits to the Buyer

The buyer's agent:

- A. Can provide complete advocacy and representation
- B. Can provide data supporting offering price when appropriate.
- C. Can provide advocacy for their buyer in the event of multiple offers. (Refer to Multiple Offer Guidelines).

3. Additional Benefits to the Seller

The seller's agent:

- A. Can provide additional background on the buyer and the offer that are not included in written form.
- B. Can facilitate the process.

4. Agent Benefits

- A. Provides a forum for agents to add value to their service
- B. Easier for agents to advise and consult with their clients when all the concerns and questions can be immediately addressed.
- C. Reduces the risk of having either agent believed to be 'unfair' to any party.