

# PHENA GUIDRY

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## CLIENT WELCOME PACKET

Here's everything you need to know about  
working with me.

[www.phenaguidry.com](http://www.phenaguidry.com)



**IT'S NICE TO MEET YOU!**  
I'm so excited to work together.

## JUST A FEW THINGS I WANT YOU TO KNOW...

Real estate can be overwhelming and stressful. There are many milestones and numerous parties are involved with buying and selling. Timing and communication are keys to our success.

We will design a personalized action plan for your needs. LET'S DIVE IN!



PHENA GUIDRY, REALTOR® | CLIENT WELCOME PACKET

LICENSED IN LOUISIANA, KELLER WILLIAMS REALTY LAKE CHARLES

2801 RYAN ST., ST. 800, LAKE CHARLES, LA 70601

OFFICE: 337-433-1171

EACH OFFICE IS INDEPENDENTLY OWNED & OPERATED

# TIMELINE & MILESTONES

Here's what you can expect & when.

## Welcome Meeting

Meet for your buyer consultation, set expectations, connect with a local lender and personalize a plan.



## Home Search

This is where we start searching for your new home! Might be quick, or it might take some time.



## Make an Offer

We will sit down review the home, write the contract and submit.



## Inspections & Appraisal

This is a big hurdle. This milestone can make or break the transaction. Don't panic though! In the words of Marie Forleo, "Everything is Figureoutable!"



## Closing

We made it! We will meet at the closing table to sign the final documents and exchange the keys! Congratulations!!!



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# WHAT CAN YOU EXPECT?

## My commitment to you.



Do our very best to ensure exceptional service to our Client.



Act as fiduciary representatives of the Client, keeping all personal information confidential. Suggest financing options and refer Client to competent lenders.



Assess market value of homes, research comparable sales. Strategize, prepare and negotiate all offers and contract documents providing the maximum investment value for the Client.



Advise Client and negotiate any inspection issues and remedies. Coordinate closing details and ensure compliance with offer details.



Communicate at a high level. Respond to all inquiries in a timely fashion.

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# WHAT I'LL NEED FROM YOU

Your commitment to me.



Be honest and truthful of home desires and needs.



Obtain lender pre-approval at the beginning of the real estate process.



Communicate issues, questions and concerns to Realtor in a timely fashion.



Inform builders, for sale by owners, and other Real Estate Agents at open houses that you are working represented by a Realtor. Allow your Realtor to contact builders and for sale by owners on your behalf.



Provide any needed documents or information to your Realtor in a timely manner.



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## Tell me about YOU!

Name:

Current Address:

Phone:

Email:

Do you: OWN RENT If rent, when is the lease up?

Do you have to sell before buying? YES NO

## Tell me about your loan:

Lender/Bank:

Loan Officer Name:

Type of Loan:

Time Frame to Buy:

30 Days or Less

30-60 Days

60 Days-1 year

1 Year +

## How do you like to communicate?

Phone Calls

Text Messages

Email

Messenger

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READY TO GET GOING?

I want to know what you're  
looking for!

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# WHY DO YOU WANT TO OWN A HOME?

- My dream is to own a home
- Because I'm getting married
- Tired of paying rent
- Need more space
- To have a place to raise a family
- To be in a specific school district
- To have an investment property
- Other, please specify

# TELL ME ABOUT THE HOME YOU WANT!

1. What part of town (or country) do you want to live in?

2. What price range would you consider?

No less than \$\_\_\_\_\_ but no more than \$\_\_\_\_\_

3. Are schools a factor and, if so, what do you need to take into consideration (e.g., want specific school system, want kids to be able to walk to school, etc.)?

4. What kind of houses would you be willing to see?

\_\_\_ One story    \_\_\_ 2 story  
\_\_\_ split level    \_\_\_ open floor plan  
\_\_\_ townhouse    \_\_\_ condo  
\_\_\_ New construction    \_\_\_ Ranch

5. What style house appeals to you most?

\_\_\_ contemporary    \_\_\_ traditional  
\_\_\_ farmhouse    \_\_\_ colonial  
\_\_\_ modern    \_\_\_ no preference

6. How much renovation would you be willing to do?

\_\_\_ A lot    \_\_\_ A little    \_\_\_ None!



# THE LOT

\*CHECK ALL THAT APPLY\*

## MUST HAVE

## WOULD LIKE TO HAVE

Large yard (1 acre or more)

\_\_\_\_\_

\_\_\_\_\_

Small yard (less than 1 acre)

\_\_\_\_\_

\_\_\_\_\_

Fenced yard

\_\_\_\_\_

\_\_\_\_\_

2 Car Carport

\_\_\_\_\_

\_\_\_\_\_

2 Car Garage

\_\_\_\_\_

\_\_\_\_\_

3 Car Garage

\_\_\_\_\_

\_\_\_\_\_

4+ Car Garage

\_\_\_\_\_

\_\_\_\_\_

Extra parking

\_\_\_\_\_

\_\_\_\_\_

Patio/deck

\_\_\_\_\_

\_\_\_\_\_

Pool / Pond on site

\_\_\_\_\_

\_\_\_\_\_

Pool / Pond in HOA

\_\_\_\_\_

\_\_\_\_\_

Outdoor Kitchen

\_\_\_\_\_

\_\_\_\_\_

Other buildings (barn, shed, etc.)

\_\_\_\_\_

\_\_\_\_\_

Special view of what?

\_\_\_\_\_

\_\_\_\_\_

# THE INTERIOR

How many bedrooms must you have? \_\_\_\_\_ would you like to have? \_\_\_\_\_

How many bathrooms do you want? \_\_\_\_\_

How big would you like your house to be (square feet)?

No less than \_\_\_\_\_ But no more than \_\_\_\_\_

What features do you want to have in your house?

MUST HAVE

WOULD LIKE TO HAVE

Carpet

\_\_\_\_\_

\_\_\_\_\_

Tile / Granite

\_\_\_\_\_

\_\_\_\_\_

Hardwood floors

\_\_\_\_\_

\_\_\_\_\_

Standalone Kitchen island

\_\_\_\_\_

\_\_\_\_\_

Separate dining room

\_\_\_\_\_

\_\_\_\_\_

Formal living room

\_\_\_\_\_

\_\_\_\_\_

Family / Bonus room

\_\_\_\_\_

\_\_\_\_\_

Study / Office

\_\_\_\_\_

\_\_\_\_\_

Separate laundry room

\_\_\_\_\_

\_\_\_\_\_

Fireplace

\_\_\_\_\_

\_\_\_\_\_

Crown molding

\_\_\_\_\_

\_\_\_\_\_

**I'M SO EXCITED TO WORK TOGETHER**

And I can't wait to get started!

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