

TRILLIUMWEST

Buyer's Journey

BUYER'S NAME

BUYER CONSULTATION

PROVIDE BUYERS GUIDE / RECO GUIDE / ID FOR FINTRAC

MORTGAGE PRE-APPROVAL

MATRIX AUTO SEARCH (SCREENED BY AGENT FIRST - CONCIERGE MODE)

VIEWING HOMES

PROVIDE PLAIN LANGUAGE FORMS IN ANTICIPATION OF OFFER

FIND A HOME

SUBMIT OFFER

ACCEPTED OFFER

ADDRESS BUYER'S REMORSE- REASSURE THEM OF THEIR DECISION

DEPOSIT DROP OFF

MORTGAGE COMMITMENT

INSURANCE COMMITMENT

ORDER STATUS CERTIFICATE (CONDO ONLY)

CONVERSATION ON WHAT TO EXPECT DURING AN INSPECTION

INSPECTION FULFILLED

FULFILL CONDITIONS

FIRM OFFER

SOLD PHOTO

LAWYER ENGAGEMENT

DOCUMENTS UPLOADED TO DOCUSIGN ROOMS

CLIENT ADDED TO TECH STACK

FIRST WALK THROUGH

SEND MOVING CHECKLIST + ADDRESS CHANGE

PLAN HOUSE WARMING GIFT

CONVERSATION AROUND WHAT TO EXPECT DURING FINAL WALK THROUGH

FINAL WALK THROUGH

HOME CLOSING

CONGRATULATIONS EMAIL

FEEDBACK EMAIL - STOP, START, CONTINUE - GOOGLE REVIEW

TW | GUELPH 7-292 STONE ROAD | GUELPH, ONTARIO | N1G 3C4

TW | KW 240 DUKE STREET WEST | KITCHENER, ONTARIO | N2H 3X6

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