



Real Estate Services

Howard Hanna Real Estate Services
9 Main Street
Brockport, NY 14420

NEW CLIENT INPUT CHECKLIST

- o RealScout Search Date _____
- o Add to Cell Contacts Date _____
- o Add to Engage CRM Date _____
 - o Newsletter
 - o Buyer
 - o Seller
 - o Open House
 - o Other

- o Intro Email to *Hanna Home Concierge* Date _____
- o Intro to Lender
 - o 1st Priority Mort. Officer _____
 - o Emailed on _____
 - o Premium Mortgage Mort. Officer _____
 - o Emailed on _____
 - o Other Lender Mort. Officer _____
 - o Emailed on _____

- o Intro to Real Estate Atty
 - o Name _____ Emailed on _____
- o Intro to Home Inspector
 - o Name _____ Contacted on _____
- o Intro to _____
 - o Contact _____ Contacted on _____