

PEOPLE
PROCESS
POSSIBILITIES

*Supporting
Your Success*



YOUR OPERATIONAL PARTNER
IN REAL ESTATE

REAL SOLUTIONS
FOR REAL ESTATE
PROFESSIONALS

— ♥ —
*Your Vision.
Our Support.*

PREMIER VIRTUAL OPERATIONAL SUPPORT
for Real Estate Professionals

Helping Real Estate Professionals

Reclaim **Time**, Improve **Efficiency**, Strengthen **Compliance** &
Scale with *Confidence*.



LISTING
*Coordination &
Management*



TRANSACTION
Coordination



ADMINISTRATIVE
Support



PROPERTY
*Management
Support*



DOCUMENT
*Preparation
Support*



EXCELLENCE



INTEGRITY



RESPECT



COMMUNITY



OWNERSHIP



STEWARDSHIP

— ♥ —
INNOVATE. DRIVE. CHANGE.
PUTTING YOUR VISION TO WORK.

Who We Are

PEOPLE | PROCESS | POSSIBILITIES



CEO/Owner/Founder

Bridgette James

About Me

Bridgette James is a strategic leader who takes a methodical approach to helping companies increase leads, efficiency, compliance, and revenue.

With over 30 years of advising leadership across the public and private sectors, Bridgette leverages her process improvement and workflow logistics skills, along with her knowledge of client engagement, to enhance operational efficiency in real estate transactions.

At The Personal CEO, Bridgette is dedicated to helping real estate professionals build and maintain a strong client base through streamlined operations, delivered with care and precision to increase sales conversions. Her goal is to help you regain your time so that you can confidently exceed your clients' expectations.



WWW.THEPERSONALCEO.COM



256.384.8498



Hello@thepersonalceo.com

SUPPORTING
REAL ESTATE
PROFESSIONALS
TO THRIVE

Our Mission

PEOPLE | PROCESS | POSSIBILITIES



The Personal CEO exists to help real estate professionals reclaim time, improve operational efficiency, strengthen compliance, and deliver exceptional client experiences through professional listing and transaction coordination and broker operations support.



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SUPPORTING
REAL ESTATE
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TO THRIVE



Our Services

SUPPORTING YOUR SUCCESS



Listing Coordination & Management

Virtual assistance for your listings, from paperwork to launch. Listing Coordination gets your listing live in MLS accurately and fast; Listing Management adds full branded marketing.



Transaction Coordination

Virtual assistance from executed contract to closing. We manage the file, the deadlines, and every party involved, with careful attention to detail.



Administrative Support

Hourly virtual assistance for scheduling, client databases, and the day-to-day admin that keeps your business moving forward.



Property Management Operations Support

You manage the properties. Our hourly virtual assistance supports records, lease deadlines, vendors, and reporting.



Document Preparation Support

Clean, complete paperwork prepared from your approved forms, ready for your review and signature.



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Listing Coordination & Management

PEOPLE | PROCESS | POSSIBILITIES



Our Promise

Take the pressure off yourself and let The Personal CEO listing team set your listing live with accuracy and attention to detail. With Listing Management, our 48-hour guarantee means your full property brochure, social media posts, one-page flyer, e-blast, and Just Listed postcards are designed and sent within 48 hours.

Your Listings. Our Support. Greater Possibilities.

ESSENTIALS

Listing Coordination

Contact us
for pricing

Virtual assistance to get your listing live, accurately and fast.

- Enter listing into your broker system of record
- Enter listing into MLS
- Order property photography with your preferred vendor
- Schedule the virtual tour (if separate from photography)
- Verify the listing on Zillow
- Send a welcome letter to your seller
- Request utility averages from your seller

PREMIUM

Listing Management

Contact us
for pricing

Everything in Listing Coordination, plus full branded marketing.

- 48-hour turnaround guarantee
- Professional MLS and advertising copy
- Full branded property brochure
- One-page branded flyer
- Social media posts with custom images
- E-blast
- Enhanced listing on Realtor.com
- Property added to your website
- Just Listed postcards designed
- Single point of contact for your seller

Custom marketing design

Branded flyers, brochures, postcards, and social media images carry a one-time design fee. We can use your existing marketing materials at no charge. Printing and postage are billed separately.



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Transaction Coordination

PEOPLE | PROCESS | POSSIBILITIES

Virtual assistance from executed contract to closing.

We handle the administrative work behind your real estate deals with careful attention to detail, keeping the process smooth for buyers and sellers. Coordination begins once the contract is executed.

ESSENTIALS

Contract to Close

Contact us
for pricing

We keep the file compliant and on schedule.

- Review the contract; follow up on missing initials, signatures, and dates
- Send you a key-dates summary and add dates to your calendar
- Introduce ourselves to lender, title, client, and co-op agent
- Open and maintain the file in your system of record
- Track and clear contingencies, including HOA/condo docs
- Weekly lender check-ins
- Verify earnest money (buyers) or payoffs and certs (sellers)
- Request the home warranty selection and follow up
- Verify loan commitment
- Upload final signed closing disclosures

PREMIUM

Full-Service Coordination

Contact us
for pricing

Everything in Essentials, plus hands-on coordination and client care.

- Extra lender check-ins whenever the file needs them
- Coordinate inspections with every party
- Monitor underwriting and flag issues early
- Review the title report and help resolve issues
- Remind clients about utilities and homeowner's insurance
- Schedule the final walkthrough and closing
- Congratulations or thank-you letter with review links
- Design and send Just Sold postcards (postage separate)
- Add your client to your past-client drip campaign

No close, no TC fee.

Fees are due only if the transaction closes and are added to the CDA where permitted. A valid card must be kept on file and is charged if payment is not received from closing.



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Administrative Support

PEOPLE | PROCESS | POSSIBILITIES

Hourly virtual assistance that keeps your business moving.

Let our administrative experts handle the details so you can focus on closing deals and building client relationships.

ESSENTIALS

Day-to-Day Admin

Contact us
for pricing

We keep your schedule and contacts in order.

- Manage and optimize your daily calendar
- Schedule and confirm client and partner appointments
- Maintain and update your client database

PREMIUM

Relationship Builder

Contact us
for pricing

Everything in Essentials, plus the work that keeps clients coming back.

- Blog writing for your online presence
- Travel logistics: bookings and itineraries
- Client gift selection and purchase
- Personalized greeting cards for birthdays, holidays, and milestones
- Client and vendor appreciation event coordination

MONTHLY RETAINER	HOURS / MONTH	PRICING
Starter	10	Upon request
Growth	20	Upon request
Partner	40	Upon request

Monthly retainers reserve a set block of hours each month and include priority service plus email and text support. Scope, hours, and cancellation terms are set out in our Scope of Services Addendum for Retainer Services.



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Property Management Operations Support

PEOPLE | PROCESS | POSSIBILITIES

You manage the properties. We support the operations.

Hourly virtual assistance for Alabama brokers, property managers, and property management teams, helping you stay organized, responsive, and focused on your properties.

ESSENTIALS

Records & Deadlines

Contact us
for pricing

Property, tenant, and lease records kept organized.

- Organize and maintain property and tenant records
- Update property management databases
- Maintain digital files and track missing records
- Track lease dates, expirations, and renewals
- Organize lease documentation and deadline calendars
- Log and track maintenance requests
- Maintain vendor contact records
- Manage admin calendars and task lists

PREMIUM

Operations Partner

Contact us
for pricing

Everything in Essentials, plus vendors, workflows, and bookkeeping help.

- Prepare lease documents from approved templates for review
- Coordinate vendor scheduling and follow-ups
- Track work orders and completion updates
- Create operational checklists and recurring processes
- Support team communication and follow-ups
- Organize invoices, receipts, and expense records
- Data entry and record reconciliation
- Prepare administrative reports for broker review

Monthly retainers available.

Starter (10 hrs), Growth (20 hrs), and Partner (40 hrs), with priority service plus email and text support. Clerical and administrative support provided under your direction and broker supervision, where applicable.



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Document Preparation Support

CLERICAL DOCUMENT PREPARATION FOR REAL ESTATE PROFESSIONALS

Accurate support. Streamlined processing. Greater peace of mind.

Clean, complete paperwork prepared from your approved forms and templates, using the information and terms you provide. Document Preparation Support is a standalone service.

ESSENTIALS

Prepared & Checked

Contact us
for pricing

Your documents prepared and checked for completeness.

- Listing agreements and buyer representation agreements from your templates
- Purchase agreements, addenda, and amendments with the terms you provide
- Seller disclosure packets assembled
- Documents checked for missing initials, signatures, and dates
- Completed documents uploaded to your system of record

PREMIUM

Prepared, Routed & Reviewed

Contact us
for pricing

Everything in Essentials, plus routing, rush service, and templates.

- Documents set up and sent for e-signature, with completion tracked
- Rush turnaround on time-sensitive documents
- Pre-submission compliance review against your brokerage checklist
- Custom template library for your most-used forms
- Property management documents (leases, renewals, notices) from approved templates

Please note

Document Preparation Support is clerical only. The Personal CEO does not negotiate terms, interpret contracts, or provide legal advice. All terms and instructions must be provided or approved by the appropriately licensed real estate professional.



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LEAD WITH EXCELLENCE. OPERATE WITH CONFIDENCE. SERVE WITH PURPOSE.

