



PREMIER OPERATIONAL SUPPORT FOR REAL ESTATE PROFESSIONALS

Service Package Checklist

Choose the support that fits your business

The Personal CEO offers six virtual support services for Alabama brokers, teams, and high-producing agents, each in two tiers. **Essentials** covers the core work. **Premium** includes everything in Essentials, plus the high-touch, creative, and client-facing extras. Check the service and tier you want, and we will confirm scope and pricing before we start.

CHOOSE YOUR SERVICE(S) AND TIER

SERVICE	ESSENTIALS	PREMIUM
Listing Coordination / Listing Management	☐	☐
Listing to Contract Bundle	☐	☐
Transaction Coordination (single / dual)	☐	☐
Administrative Support	☐	☐
Property Management Operations Support	☐	☐
Document Preparation Support (standalone)	☐	☐

How it works

STEP 1

Choose

Check the services and tier that fit your business.

STEP 2

Confirm

We confirm scope and pricing, and you sign the Client Services Agreement.

STEP 3

Relax

We handle the details so you can focus on clients and closings.

◆ EXCELLENCE ◆ INTEGRITY ◆ RESPECT ◆ COMMUNITY ◆ OWNERSHIP ◆ STEWARDSHIP

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

1. Listing Coordination & Listing Management

Virtual assistance for your listings. **Listing Coordination** (Essentials) gets your listing live accurately and fast. **Listing Management** (Premium) adds full branded marketing, delivered within our 48-hour guarantee.

ESSENTIALS

Contact us for pricing

Listing Coordination: core listing setup

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

PREMIUM

Contact us for pricing

Listing Management: everything in Listing Coordination, plus

- ☐ 48-hour turnaround guarantee on full listing launch
- ☐ Professional copywriting for MLS and advertising
- ☐ Full property brochure, branded with your logo and agent info
- ☐ One-page branded flyer
- ☐ Social media posts with branded custom images
- ☐ E-blast
- ☐ Enhance listing on Realtor.com
- ☐ Add or update property on agent website
- ☐ Design Just Listed postcards (printing and postage billed separately)
- ☐ Serve as the seller's single point of contact for questions

Payment: Listing fees are due upfront, once your listing is received and entered. **Custom marketing design** (flyer, brochure, postcard, social media image) is a one-time design fee, available with listing services only. We can use your existing marketing materials at no charge.

2. Listing to Contract Bundle

List with us and keep us when it goes under contract. This bundle combines your listing service and Transaction Coordination at one discounted price, so one team handles your listing from launch to closing with no handoff gaps.

TIER	INCLUDES	PRICING
Essentials	Listing Coordination + Transaction Coordination Essentials	Upon request
Premium	Listing Management + Transaction Coordination Premium	Upon request

BUNDLE PERKS

- One point of contact from listing launch through closing
- Your listing file, contacts, and seller details carry straight into the transaction, so nothing is re-entered

Payment: The listing portion is due upfront, once your listing is received and entered. The balance is due at closing, only if the transaction closes.

3. Transaction Coordination

Virtual assistance from contract to close. Essentials keeps the file compliant and on schedule. Premium adds hands-on coordination with every party and post-closing client care.

ESSENTIALS

Contact us for pricing

Single- or dual-sided. Starts once the contract is executed.

- ☐ Review contract for completeness; chase missing initials, signatures, and dates
- ☐ Email agent a summary of key dates
- ☐ Introduce ourselves to lender, title, client, and co-op agent as the point of contact
- ☐ Add all dates to your digital calendar
- ☐ Open and maintain the file in your broker system of record
- ☐ Track and clear contingencies, including ordering HOA/condo docs
- ☐ Weekly lender check-ins
- ☐ Buyer side: verify earnest money deposit received
- ☐ Seller side: verify payoffs and tax, water, and sewer certs
- ☐ Request home warranty selection and follow up until made
- ☐ Verify loan commitment with lender
- ☐ Upload final signed closing disclosures

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Single- or dual-sided. Everything in Essentials, plus

- ☐ Lender check-ins beyond weekly whenever the file needs it
- ☐ Coordinate inspections with agent, inspector, buyer, and co-op
- ☐ Monitor underwriting and flag issues early
- ☐ Review title report; flag and help resolve issues
- ☐ Remind clients about utilities and homeowner's insurance
- ☐ Schedule final walkthrough and closing with clients, title, and agent
- ☐ Send congratulations (buyer) or thank-you (seller) letter with review links
- ☐ Design and send Just Sold postcards (postage billed separately)
- ☐ Add client to your database and past-client drip campaign

4. Administrative Support

Hourly virtual assistance. Essentials keeps your schedule and contacts in order. Premium adds the relationship-building work that keeps clients coming back. Monthly retainers are available (see Monthly Retainer Plans).

ESSENTIALS

Contact us for pricing

Day-to-day admin

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

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Contact us for pricing

Everything in Essentials, plus

- ☐ 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

5. Property Management Operations Support

You manage the properties; our hourly virtual assistance helps manage the operations. Essentials keeps records and deadlines organized. Premium adds vendor coordination, workflow building, and bookkeeping help. Monthly retainers are available (see Monthly Retainer Plans).

ESSENTIALS

Contact us for pricing

Records and deadlines

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

PREMIUM

Contact us for pricing

Everything in Essentials, plus

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

◆ Monthly Retainer Plans

Available for Administrative Support and Property Management Operations Support. Reserve a set block of hours each month at a lower rate than hourly billing.

PLAN	HOURS / MONTH	PRICING
☐ Starter	10	Upon request
☐ Growth	20	Upon request
☐ Partner	40	Upon request

EVERY RETAINER INCLUDES

- Priority service: your requests move to the front of the queue
- Email and text support
- Hours beyond your plan billed at your tier's standard hourly rate

6. Document Preparation Support *(standalone)*

Clean, complete paperwork ready for your review and signature. This is a standalone service, purchased on its own; it is not an add-on to our listing or transaction services. All documents are prepared from your approved forms and templates for broker or agent review; we do not provide legal advice.

ESSENTIALS

Contact us for pricing

Prepared and checked

- ☐ Prepare listing agreements and buyer representation agreements from your templates
- ☐ Prepare purchase agreements, addenda, and amendments with the terms you provide
- ☐ Assemble seller disclosure packets
- ☐ Check documents for missing initials, signatures, and dates
- ☐ Upload completed documents to your system of record

PREMIUM

Contact us for pricing

Everything in Essentials, plus

- ☐ Set up and send documents for e-signature and track completion
- ☐ Rush turnaround on time-sensitive documents
- ☐ Pre-submission compliance review against your brokerage checklist
- ☐ Build and maintain a custom template library for your most-used forms
- ☐ Prepare property management documents (leases, renewals, notices) from approved templates

◆ Client Details

Name

Brokerage / company

Phone

Email

Broker system of record

Preferred photography vendor

Estimated listings or transactions per month

Desired start date

Printing, postage, and third-party vendor fees are billed separately.

Your Vision. Our Support.

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