

New Real Estate Agent Checklist



Everything You Need to Launch Your Career, Build Your Brand, and Close Your First Deals. Brought to you by Brown – Your Trusted Mortgage Partner

Getting Licensed and Business-Ready

Before you market yourself, make sure your foundation is solid:

- Obtain your real estate license
- Join a brokerage that supports new agents
- Set up your business structure (LLC, EIN, bank account)
- Choose a CRM to manage contacts & leads
- Purchase professional insurance (E&O)
- Order your business cards, email signature, and name badge

Know Your Market & Your Buyer

Understanding the local market is critical for smart conversations:

- Study local market trends, average home prices, neighborhoods, common buyer & seller FAQs
- Get familiar with MLS tools and listing platforms
- Build connections with local lenders, inspectors, appraisers, and title companies

Real Estate Marketing Tools

Set up the tools you'll use to attract and convert clients:

- ☑ Set up a branded real estate website (bonus points for SEO!)
- ☑ Claim and optimize your Google Business Profile
- ☑ Create a social media presence (Instagram, Facebook, LinkedIn, TikTok)
- ☑ Create Canva templates for listing posts, testimonials, social media, and just sold graphics
- ☑ Set up an email list and newsletter template

Real Estate Marketing Plan (Mini Version)

Use these quick wins to get attention fast:

- ☑ Introduce yourself to your sphere via email or social post
- ☑ Drop off postcards or flyers in your farm area
- ☑ Create posts similar to “What \$500K Buys You in [City]”
- ☑ Reach out to 3 local small businesses for potential collabs
- ☑ Record many Reels or TikToks: about you, local listing, etc.



Must-Know Buyer Financing Questions

New agents often get tripped up when buyers start asking money questions. You don't need to be a lender—you just need to be prepared.

Here are the top 5 questions buyers will ask you about mortgages:

1. “How much do I need for a down payment?”
2. “Should I talk to a bank or a mortgage broker?”
3. “What's the difference between pre-qualification and pre-approval?”
4. “How long does loan approval take?”
5. “What could make my loan get denied?”

☑ Pro Tip: You don't need to know every answer—but you do need a lender you trust to help your clients through the process.

Why Working with a Loan Officer Early Matters

Pairing your clients with a responsive, knowledgeable loan officer upfront will help:

1. Prevent wasted time showing homes they can't afford
2. Speed up the offer-to-close timeline
3. Avoid deal-breaking surprises during underwriting

At Brown, we help real estate agents like you close more confidently by giving your buyers the support they need to get pre-approved fast, understand their options, and stay informed every step of the way.

Final Checklist: Your First 30 Days

Announce your new career (email, social, text your network)

- Shadow another agent on showings or open houses
- Meet with a mortgage lender to understand loan options
- Practice explaining comps and buyer agency
- Follow up with every lead—yes, even the “maybe later” ones
- Ask your lender (hi 🙌) for co-branded content and resources

Want a Partner Who Helps You Succeed?

Let's grow together. At Brown, we work behind the scenes to help you shine in front of your clients.

Smart Lending. Strong Partnerships. Built For Your Success

Quick pre-approvals. On-call communication. No surprises, just closings.



Partner with a Lender That Helps You Close

Trusted by real estate agents who want smoother closings and faster pre approvals.

WWW.BROWN-TEAM.COM

INFO@BROWN-TEAM.COM

