

SIRVA Relocation Preferred Broker Network

SIRVA-Team Agent Training



Modules



Module 1 – The SIRVA Partnership & SIRVA-Team Agent Role

Module 2 – Departure Services – BMA and Home Sale

Module 3 – Destination Services – Home Finding

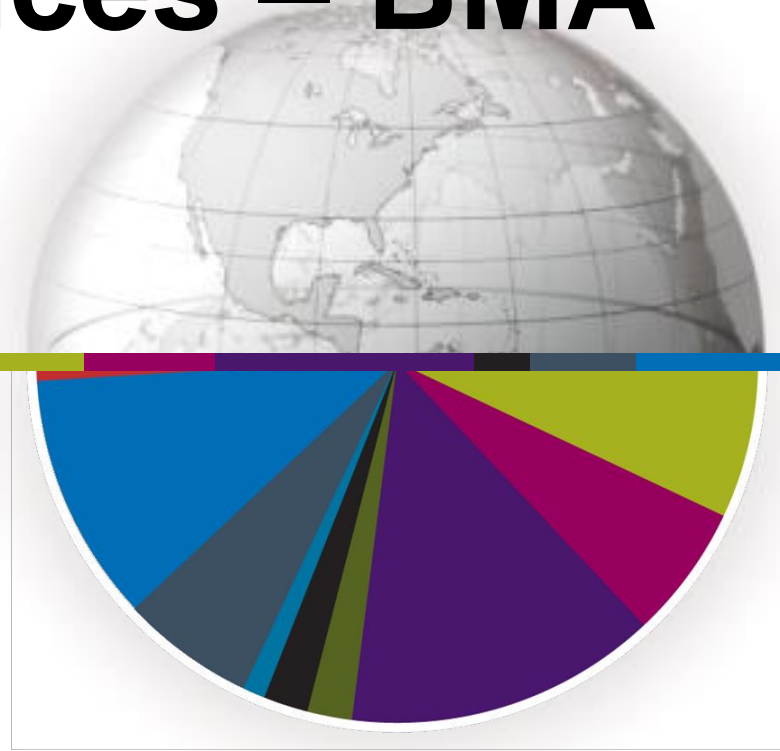
Module 4 – SIRVA-Sister Company Support

Module 5 – Performance and Quality Expectations

SIRVA Team-Agent Test

Departure Services – BMA and Home Sale

Module 2



APEX BMA Referral Process User Guide



BMA Referral Process User Guide

- Screen by screen description and instructions of how to complete the BMA referral process
- Available on the left side of your home screen after logging into Apex

You may also access the link here:

https://mmc.sirva.com/external/Relocation/Resources/ApexAgentGuide_CompletingABmaAssignmentInApex.pdf

Departure Services



Home Sale Programs

- **Pre-Decision**
 - Allows our corporate clients and potential transferees to understand their equity position, and how a property may sell if it were placed on the market.
- **Home Marketing Assistance (HMA)**
 - We assist a transferee in selling their property, but sometimes they are NOT authorized to receive relocation home sale program benefits.
 - These situations still require BMA's to be completed
 - For this reason, an agent should never discuss specific home sale benefits with the transferee during the BMA appointment as they may not apply.
- **Marketing Time**
 - The marketing time in which you are requested to price may vary upon each request. It is important to price accordingly.

Home Sale Programs

Referral process

- **Competitive BMA process**
 - Every BMA counts!
 - Two or three BMAs could be requested
 - Policy varies by client
- **SIRVA Standards**
 - Commission = 6%
 - Split – 50/50

Departure Services – Pre-Marketing



Transferee Appointment

- One-step appointment!
- Contact transferee to set appointment immediately
- **Purpose: Present marketing strategy and view property in order to complete BMA**
 - Do not discuss specific listing price
 - Do not “pressure” transferee to commit to agent choice
 - Never have transferee sign any paperwork at appointment!

APEX – What is it?

SIRVA's online system for associates, transferees, and vendors

Goal of standardizing processes and increasing efficiencies (both internal and external)

Broker/Agent Processes Currently Through APEX

- Broker Profiles & Agent Profiles
- Home Sale - All BMA process points
- Home Sale – Listing & Marketing
- Home Finding – Start to end process

Completing a BMA Referral in APEX

- Broker's Relocation Director assigns Agent.
- Agent receives APEX task via e-mail with EE information
- Agent calls EE and schedules appointment
- Agent enters BMA appointment date and time in APEX
- APEX provides agent with SIRVA's BMA instructions (48 Hr. return time *(includes weekends/holidays)*; market time; must take photos)



The BMA Process



Agent Task #1 - Agent Sets BMA Appointment

Dear Kay Barnes,

Congratulations – you have been selected for a BMA referral and possible listing opportunity! Here is the referral information:

Transferee name: Meridith Bickel
Spouse / partner name:
Property address: 1212 SMALLMAN ST, PITTSBURGH, Pennsylvania, 15222-4208
Contact information: 9529375208
BMA order comments: they have a big dog - agent should like animals
Estimated appt date: 08/22/2009

Please contact the transferee or spouse / partner at your earliest opportunity to set up a convenient appointment time. Once you have scheduled your appointment, please click on the link below to log into APEX – SIRVA's online system – and enter the appointment information & to view SIRVA's instructions regarding this referral. **Please note that the BMA data will need to be entered online into APEX via the internet.**

Please contact Angela Straatmeyer at 763-525-3706 or ReloSysEmailTrackerTest@sirva.com if you have further questions.

If you encounter any technical difficulties, please e-mail ReloITHelpDesk@sirva.com or call 1-800-999-5917, Option 1 & reference relocation ID #50011.

We look forward to working with you!


Courtesy of APEX Notifications.

 [Click to access BMA appt data entry / SIRVA Instructions](#)



>> Reminder: 4 hours


Agent Task #1 - Agent Sets BMA Appointment



Welcome, kaybarnes@prudentialpreferred.com!

[Update Appointment Date](#)

[Logout](#)

POWERED BY 

Should you encounter a technical problem please call the SIRVA CSC at 1-800-999-5917 and select option 1 or send an email to: sirvacsc@sirva.com

Tasks (unassigned)	
Task Name ↑	Run Task
Inbox (your tasks)	
Task Name ↑	Run Task
Enter BMA Appointment Date / Time for Meridith Bickel / STORA ENSO	Start Task ▶

Last Update: 5/10/2009 5:25:02 PM

Agent Task #1 - Agent Sets BMA Appointment



POWERED BY **SIRVA**[®]

Enter BMA Appointment Date / Time for Meredith Bickel Relo ID: 50011

Transferee name: Meredith Bickel

APEX instance ID: 149643

Spouse/partner name: N/A

Property address: 1212 SMALLMAN ST, PITTSBURGH, Pennsylvania 15222-4208

Transferee phone number: 9529375208

Should you encounter a technical problem please call the SIRVA CSC at 1-800-999-5917 and select option 1 or send an email to: sirvacsc@sirva.com

Appointment Information

Please contact SIRVA if the scheduled appointment date is 7 or more days from today.

Appointment date:



Please select the date input field by clicking on it & a pop-up calendar will appear. Use the calendar to select a date and the chosen date will auto-fill.

Appointment time:

Time zone:

Next

Agent Task #1 - BMA Appointment Instructions



Enter BMA Appointment Date / Time for Meridith Bickel Relo ID: 50011

Transferee name: Meridith Bickel

Spouse/partner name: N/A

Property address: 1212 SMALLMAN ST, PITTSBURGH, Pennsylvania 15222-4208

APEX instance ID: 149643

Should you encounter a technical problem please call the SIRVA CSC at 1-800-999-5917 and select option 1 or send an email to: sirvacsc@sirva.com

Here are SIRVA's expectations regarding this referral. Please acknowledge that you have read them and will abide by them at the bottom of the screen.

During Your Visit to the Transferee's Home

- Remember that this is your **one-time** opportunity to build rapport, view the property, & review your marketing plan / strategy, along with your brokerage's capabilities.
- Take color photographs of the interior & exterior of the property. Digital photos are preferred.
- Do not discuss specific pricing, but please provide relevant market information that you will be using to complete your BMA.** Offer a range in value **only if** the transferee / spouse / partner requests pricing information.
- Explain to the transferee / spouse / partner that after your visit, you will be completing a thorough evaluation of the market as compared to the subject property & will be submitting the report to SIRVA.
- Do not sign anything with the transferee / spouse / partner.

After Your Visit to the Transferee's Home

- You will receive another email providing a link to APEX in order to access the system and enter / upload all required data
 - Enter your BMA data (i.e. complete the ERC BMA form) & upload your digital photos (both done in APEX) within 48 calendar hours of your appointment**
 - Answer some additional questions about the property for SIRVA in APEX.
- You will receive reminders if you do not enter your data in a timely manner.
- SIRVA will notify your brokerage / relocation department if you do or do not receive the listing

If you have any questions or concerns, please contact **Angela Straatmeyer** at 763-525-3706 or ReloSysEmailTrackerTest@sirva.com

We look forward to working with you!

☐ I have read the above and agree to follow these instructions.

Submit to SIRVA

BMA Turn Time Requirement



Your BMA must be submitted within

48 hours

of your appointment with the transferee

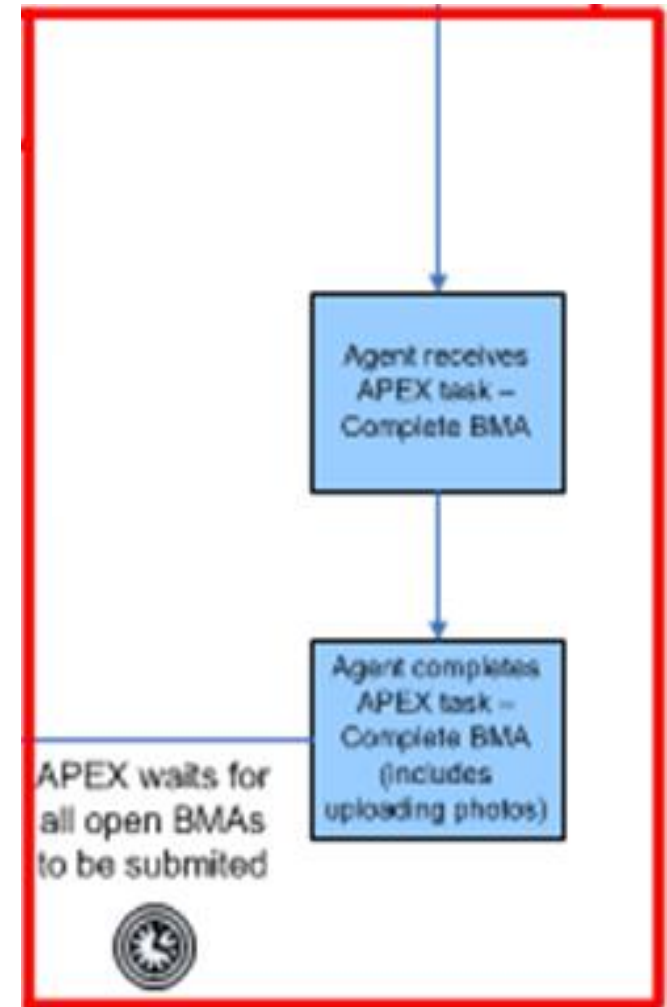
(includes weekends and holidays)

- **The clock starts 1 hour after your scheduled appointment time**
- **Once you submit your BMA you can no longer edit the Appointment date/time**

NOTE: If your appointment time changes you need to update Apex **BEFORE** completing the BMA

Agent Task #2 - Agent Completes BMA

- Agent receives an APEX task to complete the BMA after the appointment date and time has passed
 - Agent completes ERC form in APEX (identical to new ERC form)
 - Agent uploads pictures into APEX
 - Agent completes additional questions in APEX
 - Agent can complete these steps in any order, but must complete them all to finish the task



Agent Task #2 - Agent Completes BMA

- Days for BMA value is listed on the left side above “section” header.

- Sections can be completed in any order, but all must be completed prior to task being submitted.

- Must also note the market days with pricing to match each BMA assignment. APEX will stop you if entered incorrectly.

apex POWERED BY SIRVA®

Complete BMA for Instructions | 50011 | Appt. Date: 8/24/2009 3:30 PM US Central Standard Time (CST):

Transferee name: Meridith Bickel APEX instance ID: 149643
Spouse/partner name: N/A
Property address: 1212 SMALLMAN ST, PITTSBURGH, Pennsylvania 15222-4208

Should you encounter a technical problem please call the SIRVA CSC at 1-800-999-5917 and select option 1 or send an email to: sirvacsc@sirva.com

The following steps must be completed in order to submit your BMA information to SIRVA:

- Completing your ERC BMA form (by entering the data into APEX)
- Uploading digital pictures of the transferee's property - if you do not have photos, you will have the ability to indicate this and note the reason
- Answering a few additional questions about the subject property & the market

You may complete the sections in any order, but please note that **ALL SECTIONS MUST BE COMPLETE BEFORE SUBMITTING YOUR BMA**, if you have any questions, please contact Angela Straitmeyer at 763/426-3706 or ReloSysEmailTrackerTest@sirva.com.

NOTE: Please use 120 days marketing time when completing this BMA report.

Section	Information Required	Status	
ERC BMA - Page 1	<ul style="list-style-type: none">Assignment InformationSubject InformationSubject LocationMiscellaneous	Not Complete	Edit
ERC BMA - Page 2	<ul style="list-style-type: none">Subject ConditionInspections/Disclosures	Not Complete	Edit
ERC BMA - Page 3	<ul style="list-style-type: none">FinancingMarket Conditions	Not Complete	Edit
ERC BMA - Page 4	<ul style="list-style-type: none">Competing Listings	Not Complete	Edit
ERC BMA - Page 5	<ul style="list-style-type: none">Comparable Sales	Not Complete	Edit
ERC BMA - Page 6	<ul style="list-style-type: none">Most Likely Buyer(s)Marketing StrategyValue AnalysisSignatures	Not Complete	Edit
Upload pictures	<ul style="list-style-type: none">Upload minimum of 1 (one) digital photo or state reason why no photos are provided	Not Complete	Edit
Additional questions	<ul style="list-style-type: none">High Risk ConcernsNew Construction CompetitionREO / Foreclosure CompetitionSchool Ratings	Not Complete	Edit

Submit

BMA Pricing



SIRVA has two standards when requesting BMA pricing

- **Between 60 days and 120 days depending on client policy.**
- **Agent pricing should be adjusted to reflect the requested marketing time.**
 - Client policy may dictate a different requested time frame – please refer to referral information for actual requested market time

Example

- **Requested BMA Market Time = 60 Days**
- Market Area: Anytown, MN
- Average marketing time in Anytown = 150 days
- Agent's most probable sales price based on 150 day marketing = \$210,000
 - When considering that the property needs to sell in 60 days instead of 150 days, agent's most probable sales price needs to adjust to \$195,000
- **Most Probable Sales Price Submitted on ERC BMA Form = \$195,000**

Other SIRVA BMA “Tips”

- Be accurate and candid in your BMA and give careful consideration for requested timing and market conditions.
- Suggested list price and most probable sales prices should be based upon sales and listed comparable properties in the subject’s location.
- Be aware of the market time permitted to achieve the sale and price the home accordingly to sell within that time frame, while still achieving the highest sales price possible.
- Please do not try to “buy” the listing and then request price reductions two weeks later based on “new” market data.
- If there is a change in the market conditions that warrants a reduction in price, please make that recommendation regardless of the situation.

Agent Task #2 - Agent Completes BMA

- Transferee name and address are in header on each page
- **APEX Form will timeout after 45 minutes of inactivity**
- APEX Form is identical to the ERC form except there are no signature fields on page 6 (no signature required)
- Majority of fields are required (including 3 list & 3 sold comps) to prevent from submitting blanks

apex Complete BMA for ERC BMA - Page 1 [50011] Appl. Date: 8/24/2009 3:30 PM US Central Standard Time (CST)

Transferee name: Worldwide ERC APEX Software Inc. (50000) Should you encounter a business problem please call the SIRVA Support Center at 1-800-595-5917 and select option 1 or email us at sirva@worldwideerc.com

Transferee address: 1212 S.W. 10th Ave, Ft. Lauderdale, FL 33304-4200

Please note that you must either complete this system in its entirety (if you want your data to be stored) or "Cancel" at the bottom within 45 minutes of completing this system or you will lose all data entered.

WORLDWIDE ERC®
THE WORKFORCE MOBILITY ASSOCIATION

Worldwide ERC® Broker's Market Analysis and Strategy Report

Purpose: This report is designed to enable the real estate broker to conduct a diligent analysis of the subject property's condition, competition, and future marketability based on key factors. The broker is to estimate the subject property's Most Likely Sales Price.

This report is a home inspection. It is not an appraisal. No comparative market analysis has not been performed in accordance with the Uniform Standards of Professional Practice. It is not to be construed as an appraisal and may not be used as such for any purpose. Preparation of this form need to be aware of any state specific disclosure requirements and include them as they apply as appropriate.

Preparation of this form: For producers or contracting brokerages, preparing report, and providing advice, follow the requesting company's guidelines. The Most Likely Sales Price (MLSP) is based on "as is" condition and a marketing time not to exceed 1-2 days if a contract of sale is or directed by the client.

ASSIGNMENT INFORMATION

For # [redacted]
Property Address: [redacted]
City, State, Zip: [redacted]
Date Prepared for Client: [redacted]
Preparing Broker's Address: [redacted]
City, State, Zip: [redacted]
Broker's State License: [redacted]
Contact Name: [redacted]
Real Estate Firm Address: [redacted]
City, State, Zip: [redacted]
Agent's Signature: [redacted]
Homeowner's purchase price: \$ [redacted] Date purchased: [redacted]
Homeowner's credit by Homeowner's name: [redacted]

SUBJECT INFORMATION

Is the subject currently listed? ☐ Yes ☐ No Listing Company Agent: [redacted]
Type of Ownership: ☐ Fee Simple ☐ Leasehold ☐ Occupant: ☐ Homeowner ☐ Tenant ☐ Vacant
Use: ☐ Single ☐ Duplex ☐ Triplex ☐ Single Family ☐ Mixed Use ☐ Town House ☐ Modular ☐ Mobile Home
Indicate any personal property that remains (e.g., refrigerator, range, etc.): [redacted]

SUBJECT LOCATION

Subject's location type: ☐ Urban ☐ Suburban ☐ Exurban ☐ Rural ☐ Park ☐ Resort
Let Characteristics, positive / negative aspects: [redacted]
Subject's view: positive / negative aspects: [redacted]
List additional factors (which you are aware that may affect the desirability of the property): [redacted]

MISCELLANEOUS

Site Characteristics of which you are aware (check all that apply):
☐ Private Street Access ☐ Private Street Maintenance ☐ Flooded ☐ Other
☐ Easements / Encroachments ☐ Interests ☐ Other
☐ Open Street Surface ☐ Private Driveway Surface ☐ Other

Measurements of which you are aware (check all that apply):
☐ Distance from subject to nearest designated environmental area ☐ Distance from subject to nearest public water ☐ Distance from subject to nearest public sewer ☐ Distance from subject to nearest public road ☐ Distance from subject to nearest public utility ☐ Distance from subject to nearest public airport ☐ Distance from subject to nearest public port ☐ Distance from subject to nearest public airport ☐ Distance from subject to nearest public port

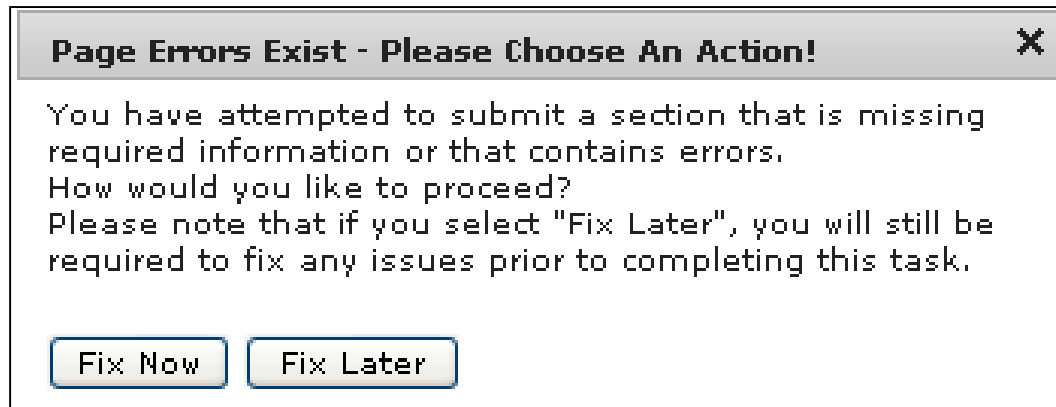
Check all other items of which you are aware that may affect the marketability or value of the subject property and comment below:
☐ Other of home not listed for the area ☐ Subject is over improved ☐ Subject is under improved ☐ Other of home not listed for the area ☐ Subject is over improved ☐ Subject is under improved ☐ Other of home not listed for the area ☐ Subject is over improved ☐ Subject is under improved

Comments: [redacted]

Copyright © 2009 by Worldwide ERC®
This form is licensed to Worldwide ERC® by Worldwide ERC®
For use only with Worldwide ERC® software

Agent Task #2 - Agent Completes BMA

If agent clicks “Save” and any required fields are blank or if there are any validation errors, this message appears:



- If user selects “Fix Later” the agent is returned to the main screen where agent can move to another section. Upon returning to that section, agent will select “edit” for this page. All data will be there with the errors identified in red.
- If user selects “Fix Now” the agent will remain on this screen and the errors will be identified in red.

Agent Task #2 - Agent Completes BMA

Errors are identified in two ways –

1. Marked in red on the screen itself (top shot)

The screenshot shows a web form with the following sections:

- Subject's location type:** Radio buttons for Urban, Suburban, Distant suburban, Rural, Farm, and Resort. The 'Urban' button is highlighted in red.
- Lot Characteristics: positive / negative (explain):** A text box containing 'great landscaping'.
- Subject's view: positive / negative (explain):** An empty text box with a red border.
- Locational issues of which you are aware that may affect the insurability of the property:** An empty text box with a red border.

2. In list form at the bottom of the shot

Validation Errors:

- Real Estate Firm Phone # is a required field.
- Agent Preparer Phone # is a required field.
- Specify the location type.
- Subject's view is a required field.
- Locational issues is a required field.

Agent Task #2 - Agent Completes BMA

- User must either select they have no photos to upload (and enter a reason why) or upload at least one photo.
- System will accept many formats, like jpeg, tif, and doc.
- If photos cannot be uploaded, all photos must be e-mailed.

apex POWERED BY SIRVA®

Complete BMA for | 50011 | Appt. Date: 8/24/2009 3:30 PM US Central Standard Time (CST):
Upload pictures

Transferee name: Meridith Bickel APEX instance ID: 149643
Spouse/partner name: N/A
Property address: 1212 SMALLMAN ST, PITTSBURGH, Pennsylvania 15222-4208

Should you encounter a technical problem please call the SIRVA CSC at 1-800-999-5917 and select option 1 or send an email to: sirvacsc@sirva.com

Please note that you must either complete this screen in its entirety OR save your data (by clicking "Save" or "Submit" at the bottom) **within 30 minutes of beginning this screen** or you will lose all data entered.

If you have any questions, please contact Angela Straatmeyer at 763-525-3706. If you need technical assistance, please contact the SIRVA help desk at 1-800-999-5917.

STEP 2 – Upload your BMA pictures

☐ I do not have any BMA photos to upload

- Make sure that you have saved your pictures on your computer. Click Browse below. You will see a window like [this](#) appear.
- Locate the photo that you want to upload and click on it. The name that you gave to the photo should appear in the File name field.
- Click Open & the path and name of the file should appear in the box next to Browse.
- Click Upload. The photo will upload to SIRVA.
- **Repeat these steps for each photo that you wish to send.**
- Click Save once you have uploaded all of your photos.

Browse

Upload

Save

Agent Task #2 - Agent Completes BMA (Photos)

- Once upload is clicked, file name appears under the label “Previously uploaded file(s)” so agents can see what has already uploaded.
- The agent will get an error message if upload is not successful and may repeat the process or select another file.
- Note that “I don’t have any BMA photos to upload” is grayed out once one file has uploaded.

The screenshot shows the SIRVA APEX interface for completing a BMA. At the top, the 'apex' logo is on the left, and 'POWERED BY SIRVA' is on the right. Below the logo, it says 'Complete BMA for Upload pictures'. To the right of this, it displays '50011 | Appt. Date: 8/24/2009 3:30 PM US Central Standard Time (CST):'. Below this, there are three fields: 'Transferee name: Meridith Bickel', 'Spouse/partner name: N/A', and 'Property address: 1212 SMALLMAN ST, PITTSBURGH, Pennsylvania 15222-4208'. To the right of these fields, there is a box with contact information: 'Should you encounter a technical problem please call the SIRVA CSC at 1-800-999-5917 and select option 1 or send an email to: sirvacsc@sirva.com'. Below these fields, there is a large box with a warning: 'Please note that you must either complete this screen in its entirety OR save your data (by clicking "Save" or "Submit" at the bottom) within 30 minutes of beginning this screen or you will lose all data entered.' Below this warning, there is a line of text: 'If you have any questions, please contact Angela Straatmeyer at 763-525-3706. If you need technical assistance, please contact the SIRVA help desk at 1-800-999-5917.' Below this, there is a section titled 'STEP 2 – Upload your BMA pictures'. Under this section, there is a checkbox labeled 'I do not have any BMA photos to upload'. Below this checkbox, there is a list of instructions: '• Make sure that you have saved your pictures on your computer. Click Browse below. You will see a window like [this](#) appear. • Locate the photo that you want to upload and click on it. The name that you gave to the photo should appear in the File name field. • Click Open & the path and name of the file should appear in the box next to Browse. • Click Upload. The photo will upload to SIRVA. • Repeat these steps for each photo that you wish to send. • Click Save once you have uploaded all of your photos.' Below the instructions, there is a text input field and a 'Browse...' button. Below the 'Browse...' button, there is a button labeled 'Upload'. Below the 'Upload' button, there is a message: 'Your file (Captivate movie.doc) has been uploaded successfully.' Below this message, there is a section titled 'Previously uploaded file(s)' with a list containing 'Captivate movie.doc'. At the bottom right of the form, there is a 'Save' button.

Agent Task #2 - Agent Completes BMA (Add'l Questions)

- If users select a “Potential area of concern” then required comments field appears.
- For new construction & REO/foreclosure, Agent must mark that subject is not competing with those types of properties OR answer the 3 questions about that type (location, price range and number / condition).
- **Agent must enter 3 strongest selling features.**
- School rating description and rating for subject only displayed if agent marks that there is a rating system; those fields will then be required.

apex POWERED BY **SIRVA**

Complete BMA for additional questions | 50011 | Appt. Date: 8/24/2009 3:30 PM US Central Standard Time (CST):

Transferor name: Meredith D'Elia APEX instance ID: 140643

Spouse/partner name: N/A

Property address: 1212 SMALLMAN ST., PITTSBURGH, Pennsylvania 15222-4208

Should you encounter a technical problem please call the SIRVA/CSC at 1-800-999-5917 and select option 1 or send an email to: apex@apex.com

Please note that you must either complete this screen in its entirety OR save your data (by clicking "Save" or "Submit" at the bottom) within 30 minutes of beginning this screen or you will lose all data entered.

STEP 3 - Answer additional questions about the subject and the market:

Potential areas of concern: Select all that apply by clicking on the desired item in the left hand box and then clicking the right facing double arrows. The selected item should display in the right hand box. **Please select all that apply to the subject property.**

Property has a fire stigma

Property has a flood stigma

Property has a murder stigma

Property has a suicide stigma

Property has a pending lawsuit stigma

Property is overbuilt for area

Located near commercial property

Located near cemetery

Located near apartment complex

Comments:
apartment building at the end of the street

If new construction is a competing property type, please answer the following:

Location of new construction:

Price range of new construction: \$ to \$

Number of new construction listings:

☒ Subject is not competing with new construction

If REO / foreclosure is a competing property type, please answer the following:

Location of REOs / foreclosures:

Price range of REOs / foreclosures: \$ to \$

Condition of REOs / foreclosures listings:

☐ Subject is not competing with REOs / foreclosures

Please list the three (3) strongest selling features of the property:

-
-
-

Is there a rating system for schools in your area? ☒ Yes ☐ No

Please describe the rating system:

What is the rating for the school system that serves this property? out of 5

Save

Agent Task #2 - Agent Completes BMA (Submit Form)



Complete BMA for
Instructions

| 50011 | Appt. Date: 8/24/2009 3:30 PM US Central Standard Time (CST):

POWERED BY SIRVA®

Transferee name: Meridith Bickel APEX Instance ID: 149643
Spouse/partner name: N/A
Property address: 1212 SMALLMAN ST, PITTSBURGH, Pennsylvania 15222-4208

Should you encounter a technical problem please call the SIRVA CSC at 1-800-999-5917 and select option 1 or send an email to: sirvacsc@sirva.com

The following steps must be completed in order to submit your BMA information to SIRVA:

- Completing your ERC BMA form (by entering the data into APEX)
- Uploading digital pictures of the transferee's property - if you do not have photos, you will have the ability to indicate this and note the reason
- Answering a few additional questions about the subject property & the market

You may complete the sections in any order, but please note that **ALL SECTIONS MUST BE COMPLETE BEFORE SUBMITTING YOUR BMA**. If you have any questions, please contact Angela Straatmeyer at 763-525-3706 or ReloSysEmailTrackerTest@sirva.com.

NOTE: Please use 120 days marketing time when completing this BMA report.

Section	Information Required	Status	
ERC BMA - Page 1	<ul style="list-style-type: none">• Assignment Information• Subject Information• Subject Location• Miscellaneous	✓ Complete	Edit
ERC BMA - Page 2	<ul style="list-style-type: none">• Subject Condition• Inspections/Disclosures	✓ Complete	Edit
ERC BMA - Page 3	<ul style="list-style-type: none">• Financing• Market Conditions	✓ Complete	Edit
ERC BMA - Page 4	<ul style="list-style-type: none">• Competing Listings	✓ Complete	Edit
ERC BMA - Page 5	<ul style="list-style-type: none">• Comparable Sales	✓ Complete	Edit
ERC BMA - Page 6	<ul style="list-style-type: none">• Most Likely Buyer(s)• Marketing Strategy• Value Analysis• Signatures	✓ Complete	Edit
Upload pictures	<ul style="list-style-type: none">• Upload minimum of 1 (one) digital photo or state reason why no photos are provided	✓ Complete	Edit
Additional questions	<ul style="list-style-type: none">• High Risk Concerns• New Construction Competition• REO / Foreclosure Competition• School Ratings	✓ Complete	Edit

[Submit](#)

*****If Broker's Relocation Department must review BMAs before coming to SIRVA, they will need to work out a process within their organization*****

- Submission from Agent goes directly to SIRVA.
- PDF of BMA is automatically e-mailed to agent and "Primary Listing Contact."
- "Additional questions" replaces the SIRVA addendum.

SIRVA®

Relocate Your Thinking

SIRVA Next Steps

Once all ordered BMAs are submitted, APEX auto-calculates the variance (based on the Most Probable Sales Prices)

If in variance...

- REC(Real Estate Consultant) will contact agent to review submitted BMA
- Based on conversation, if agent review is needed, Agent Task #3 is completed
- Based on conversation, if agent review is not needed, BMA review is completed by REC, and reviewed by RC with EE
- No further APEX agent tasks are required

If out of variance...

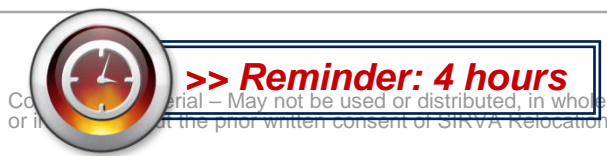
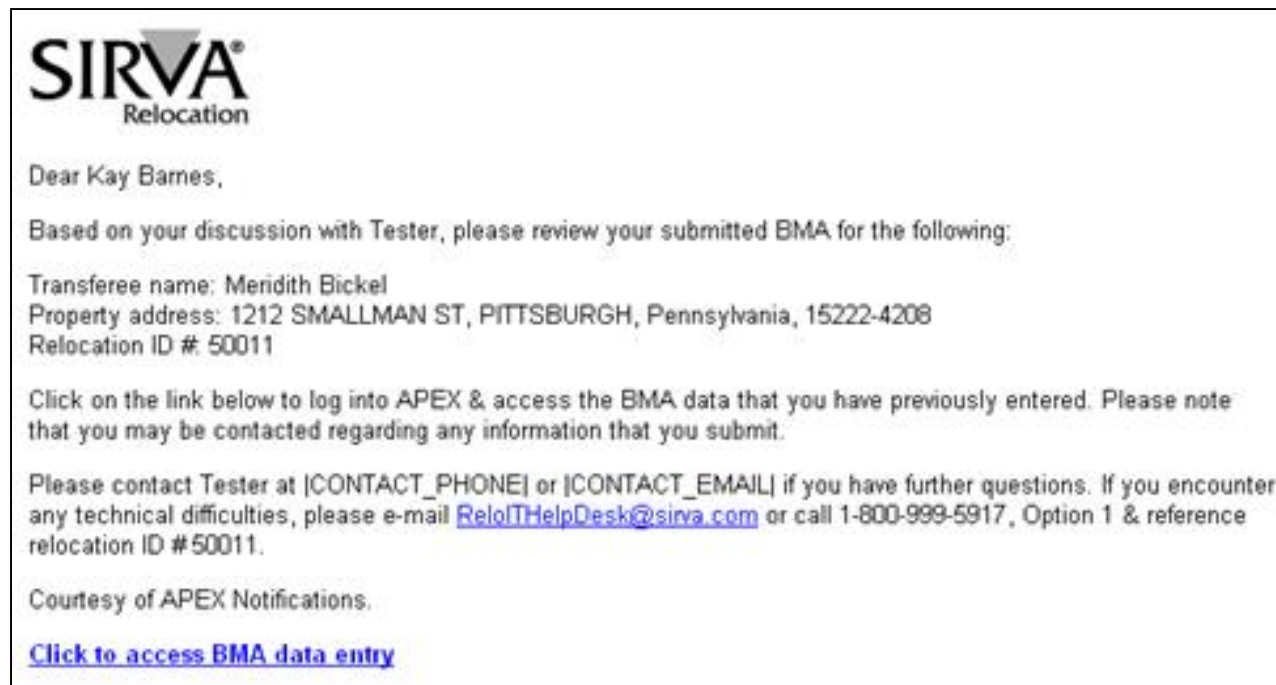
- REC will contact agent to review submitted BMA
- Based on conversation, REC has three options:
 1. Proceed with review “as is”
 2. Agent review requested for additional information or clarification (Agent Task #3)
 3. SIRVA Orders a third BMA (process starts over)

Note: APEX will track the number of times an agent makes revisions to a BMA

Confidential Material – May not be used or distributed, in whole or in part, without the prior written consent of SIRVA Relocation

Agent Task #3 – Request Agent Review (if needed)

If any review of the BMA by the agent is needed after this conversation, agent will be sent this task email to update the BMA with additional information, if applicable:



Agent Task #3 – Request Agent Review (if needed)

- Most recent data submitted by agent will auto fill

- Agent may edit any section

NOTE: Agent *MUST* select one of the buttons at the bottom to close this page and return to main screen:

- “No Revisions Required”
- OR
- “Submit Revisions”

apex
Review Submitted BMA Data for STORA ENSO | 50611: ERC BMA - Page 1

Should you encounter a technical problem please call the SIRVA CSE at 1-800-899-5917 and select option 1 or email an email to: 50611@SIRVA.com

Please note that you must either complete this screen to its entirety OR save your data by clicking "Save" or "Submit" at the bottom within 30 minutes of beginning this screen or you will lose all data entered.

WORLDWIDE ERC®
THE WORKFORCE MOBILITY ASSOCIATION

Worldwide ERC® Broker's Market Analysis and Strategy Report

Purpose: This report is designed to enable the real estate broker to conduct a diligent analysis of the subject property's condition, competition, and future marketability. Based on this analysis, the broker is to estimate the subject property's Most Likely Sales Price.

This is **not** a home inspection. Nor is this an appraisal. This comparative market analysis has not been performed in accordance with the Uniform Standards of Professional Appraisal Practice. It is not to be construed as an appraisal and may not be used as such for any purpose. Preparers of this form need to be aware of any state-specific disclosure requirements and include them in this form as appropriate.

Preparer's Information: For practitioners on contacting homeowners, inspecting property, submitting report, and providing photos, follow the requesting company's guidelines. This Most Likely Sales Price (MSLP) is based on "as is" condition and a marketing time not to exceed 120 days to a contract of sale or as directed by the client.

File #: _____

Property Address: 1212 Smallman Street
City, State, Zip: Pittsburgh PA 15222

Request Reported by (Mr. & Contact): SIRVA
Requesting Via Address: _____

City, State, Zip: _____

Real Estate Firm: Prudential Preferred
Contact name: Blake Dubois
Real Estate Firm Address: _____

City, State, Zip: _____

Agent Preparation: Mary Barnes
Homeowner's purchase price: \$ 200000
Date purchased: _____

Improvements made by homeowner (if any): _____

Is the subject currently listed? ☐ Yes ☒ No

Form of Ownership: ☐ Fee Simple ☐ Leasehold ☐ Joint Tenancy ☐ Tenants in Common

Type: ☐ Condo ☐ Coop ☐ PUD ☐ Single Family ☐ Multi Unit ☐ Town House ☐ Modular ☐ Mobile Home

Indicate any personal property that remains (e.g., refrigerator, range, etc.): _____

Subject's location type: ☐ Urban ☒ Suburban ☐ Exurban ☐ Rural ☐ Farm ☐ Recreational

Let Characteristics: positive / negative (optional)
positive: _____
negative: _____

Subject's view: positive / negative (optional)
positive: _____
negative: _____

Local characteristics of which you are aware that may affect the marketability of the property: _____

Site Characteristics of which you are aware (check all that apply):

☐ Private Street Access ☐ Private Street Maintenance ☐ Gated ☐ Aerial ☐ Street Lighting

☐ Encroachment / Easement Issues ☐ Slope ☐ Curb / Chalks

☐ Poor Street Surface ☐ Flood (Emergency Surface)

Other characteristics of which you are aware (check all that apply):

☐ Mechanical issues with neighboring properties ☐ Excessive drainage or pond ☐ Mobile homes / trailer park nearby

☐ Subject located on or near designated environmental sites ☐ Location next to agricultural area ☐ Close proximity to hospital / healthcare, etc.

☐ Neighbored has restrictive covenants ☐ Subject located near railroad tracks ☐ Audible street or highway noise present

☐ Located on or facing up to busy / main street ☐ Located in flood plain ☐ Located in earthquake zone

☐ Closest road to school or public park ☐ Properly located on corner lot ☐ Access to subject property

☐ Located near / in view of power lines / water towers / radio towers ☐ Located next to industrial area ☐ Located on airport flight path

Check all other items of which you are aware that may affect the marketability or value of the subject property and comment below:

☐ Style of home not typical for the area ☐ Subject is under improved ☐ Subject is under improved

☐ Inadequate parking ☐ Functional obsolescence ☐ Deep driveway ☐ Substantial time to sell is more than 120 days

☐ Proposed land use change ☐ Other sales activity in area or price range ☐ Property lacks first right of refusal ☐ Other

☐ Proposed or pending encroachments ☐ Property lacks first right of refusal ☐ Other

☐ Other does not allow "for sale" signs on property ☐ Other does not allow "for sale" signs on property ☐ Other

Comments: _____

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No Revisions Required **Submit Revisions**

Agent Task #3 – Request Agent Review (if needed)

Agent can edit any section in any order. Once agent finalizes all editing, agent must select 'Review Completed.'

apex POWERED BY **SIRVA**

Review Submitted BMA Data for STORA ENSO | 50011: Instructions

Transferee name: Meridith Bickel **APEX instance ID:** 149643

Spouse/partner name: N/A

Property address: 1212 SMALLMAN ST, PITTSBURGH, Pennsylvania 15222-4208

Should you encounter a technical problem please call the SIRVA CSC at 1-800-999-5917 and select option 1 or send an email to: sirvacsc@sirva.com

Please review your submitted BMA data per your discussion with SIRVA by clicking **Edit** next to the appropriate section(s). Once you have finished, please click **Review Completed**.

If you have any questions, please contact Tester at or .

Section	Information Required	
ERC BMA - Page 1	<ul style="list-style-type: none">• Assignment Information• Subject Information• Subject Location• Miscellaneous	Edit
ERC BMA - Page 2	<ul style="list-style-type: none">• Subject Condition• Inspections/Disclosures	Edit
ERC BMA - Page 3	<ul style="list-style-type: none">• Financing• Market Conditions	Edit
ERC BMA - Page 4	<ul style="list-style-type: none">• Competing Listings	Edit
ERC BMA - Page 5	<ul style="list-style-type: none">• Comparable Sales	Edit
ERC BMA - Page 6	<ul style="list-style-type: none">• Most Likely Buyer(s)• Marketing Strategy• Value Analysis• Signatures	Edit
Additional questions	<ul style="list-style-type: none">• High Risk Concerns• New Construction Competition• REO / Foreclosure Competition• School Ratings	Edit

Review Completed

The Listing & Marketing Process



Listing Agent Selection

Listing agent selection

- Transferee makes a decision on which agent they wish to work with.
- SIRVA informs both brokers of transferee's decision.

NOTE: Agents are not to contact transferees about their listing choice after the decision has been made.

If you have questions, please contact SIRVA.

See 'Declination Email' that will be sent through APEX.



Dear [Agent Name],

Thank you for your time in completing a Broker's Market Analysis for [Property Address].

The decision has been made to not list the property with you at this time. The reason selected for this decision is:

Declination Reason

Should you have any additional questions or concerns, please contact [Associate that ordered BMA Name] at [Associate that ordered BMA Phone] or [Associate that ordered BMA Email] directly.

Courtesy of SIRVA Relocation Notifications.

Important Notes about Listing Agent Selection



- **Any agent completing a BMA has a chance to win the listing opportunity**
- **There are occasions where it may appear a transferee has an agent in mind when you arrive to complete the BMA...**
 - You always have a chance to win their business by developing a strong rapport, impressing them with your marketing strategy, and proving your knowledge and experience selling homes in the area.
 - SIRVA reviews all the BMA information with the Transferee after all the reports are submitted to review the data, discuss the meetings with the agents, and get a sense of the presented marketing strategies.
 - During this conversation the SIRVA Consultant will ask them which agent they would like to work with.

Listing Process



Listing process

- After broker is notified of transferee decision, listing paperwork will be emailed to Broker.
- **Please read all instructions provided with listing paperwork**
 - **There are certain Relocation Programs** in which you will only receive a SIRVA Listing Agreement and all offer paperwork needed.
 - **While other Relocation Programs** will include only a Local Broker Listing Agreement and all offer paperwork needed until an acceptable offer is presented, at which point the Broker Agreement shall be terminated, and the SIRVA Listing Agreement must then be executed.
 - For Home Marketing Assistance only files, SIRVA will not be signing any listing agreements or offers; the responsibility for this will rest with the relocating Employee.

(Please discuss any questions with your SIRVA Relocation Consultant)

You got the listing...now what?



- You suggested a Most Probable Sales Price in your BMA. Continue to work toward achieving the best price possible in the shortest amount of time.
- The lower your variance between the MPSP and the Actual Sales Price, the more likely you are to sell the property instead of losing the sale.

Focus should be on SELLING the property for the best price possible, in the shortest amount of time to a qualified buyer.

The Marketing Strategy of the SIRVA-Team Agent should be “Best-in-Class”, to help sell the property quickly, and to stand out in the marketplace.

Marketing the property to sell!

Photos

- Professional grade.
- Use multiple photos.
- Photos of empty rooms are not useful unless they show some kind of desirable architectural feature or tell a positive story about the house.
- Change out seasonal photos

MLS Comments

- Utilize the comment section on MLS/Realtor.com/etc to use creative verbiage that pinpoints the specific *buyer-pool* for the house and include any seller incentives.
- Write a good narrative about the house; don't just give the minimum "fill in the blank" information.

Open Houses

- Use of broker/agent open houses should be with the intent of getting feedback about the house and pricing.
- If open houses are not effective in selling properties in your area, this may not be an effective marketing tool.

Broker/Agent & General

- Be sure property is clean and presentable.
- Please contact your Relocation Consultant before any professional staging is agreed to. All staging contracts must be authorized by **SIRVA Risk/Legal.**

Marketing the property to sell!

Internet Tools and Advertising of Property

- Strong internet presence on multiple, popular real estate websites, complete with narrative about the property.
- Enhanced Version of Realtor.com
- Use of YouTube for Virtual Tours, iPhones, iPads for home finding Agents.
- Facebook postings
- Brochure boxes in yards a must.
- Door knocking to neighbors letting them know home has been listed.
- Direct Mailings, 24-Hour Phone Number with Pre-Recording about the home.
- Email Campaigns
- High quality feature brochures for high-end or luxury properties.

Marketing the property to sell!

- **Communication with SIRVA and the transferee is #1 priority**
 - Maintain pro-active communication with SIRVA and provide accurate, complete bi-weekly Marketing Activity Reports to SIRVA on time.
- Check on the subject at least once a week, in person, especially if vacant, and report anything that affects condition or marketability.
- ***Advertise SIRVA Mortgage incentives***
- Provide information to SIRVA on incentives that may help sell property.
- Update SIRVA on any repair or updates that may be needed.
- Update pricing as needed, suggest price reductions.
 - Communicate any price reduction suggestions to both SIRVA and transferee.
 - Understand the market conditions at all times, including unemployment rate, supply and demand, average marketing times, price trends, etc. and relay changes to SIRVA and the Transferee.
 - If a house has not sold in 30 days it is definitely time for a price reduction.

Market Activity Report



Market Activity Report Process



The Market Activity Report (MAR) is the most important document in the marketing process for SIRVA. This “Living BMA” informs SIRVA of what is changing, what is needed next, and what will it take to get a property sold.

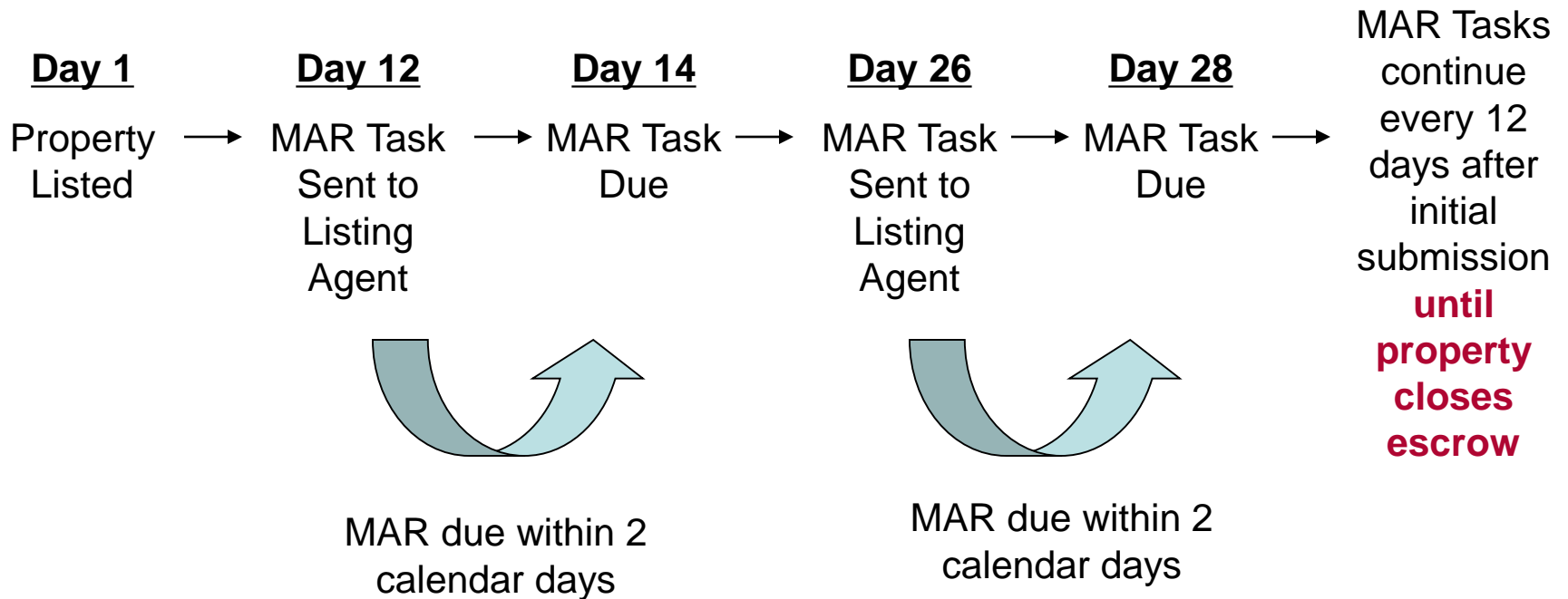
Why are Bi-Weekly Marketing Update Reports required?

- If a buyout is accepted it provides a smooth transition to the SIRVA Inventory team .
- SIRVA can better partner with the Agent to discuss challenges and actions needed with the transferee.
- Corporate clients expect to receive these updates.
- It is a requirement in the contract between SIRVA Relocation and your brokerage.

How Does It Work?


- The task to complete a SIRVA MAR has been automated.
- Listing agents have the ability to complete MARs within the APEX system (similar to the BMA process).
- APEX will pull data provided in the original BMA completed by the agent into the MAR and then pull data from MAR to subsequent MAR to allow agents to make updates instead of re-entering information every two weeks into the later MAR.

Sample MAR Time Line



Notification of MAR Due

When a Market Activity Report task is sent, the Listing Agent will receive this email (click link to access MAR task):




Dear [Agent Name],

SIRVA Relocation requests that you complete a Marketing Activity Report (MAR) for the following property:

Property Address: [Property Address]

Please click on the link below to log on to the relocation portal to enter your MAR data and upload your supporting documents. Step-by-step uploading instructions will be provided in the task. In an effort to ensure a continued joint effort in marketing this property effectively, SIRVA requests that this task be completed in the next 48 calendar hours.

If you have any questions or concerns, please contact [RC Name] at [RC Phone Number]. If you encounter any technical difficulties, please e-mail ITHelpDesk@sirva.com or call 1-800-999-5917, Option 1 & reference relocation ID # [Relo ID]

 [Click to access Marketing Activity Report task](#)

Courtesy of SIRVA Relocation Notifications.

Notification if MAR is overdue

If the MAR is not completed within 48 hours of receiving the MAR Task Notification, the following email will go to the Listing Agent and be copied to the '*Primary Listing Referral Contact*':



Dear [Agent Name],

The task to complete a Marketing Activity Report (MAR) for the following property is overdue:

Property Address: [Property Address]

SIRVA requested that you complete this task within 48 calendar hours of receipt. You received this task on [Task Receipt Date] and it is incomplete at this time.

In an effort to ensure a continued joint effort in marketing this property effectively, SIRVA now requests that this task be completed immediately.

Note: You will continue to receive email reminders until this task is completed.

If you have any questions or concerns, please contact [RC Name] at [RC Phone Number]. If you encounter any technical difficulties, please e-mail ITHelpDesk@sirva.com or call 1-800-999-5917, Option 1 & reference relocation ID # [Relo ID].

Courtesy of SIRVA Relocation Notifications.

Market Activity Report Main Screen

This screen looks very similar to the screen you would have seen when completing a BMA in the APEX system.

The MAR screen has the form broken down into sections, just as it would be if it were on a piece of paper:

- Subject Property Information
- Listing Activity
- Broker Market Analysis Data Review
- Comparable Properties
- Market Data
- Strategy Information
- Upload Documents


All sections must be entered to complete report – see following pages for instructions on completing each section.

POWERED BY **SIRVA®**
Complete Marketing Activity Report (MAR) for 3300 FERNBROOK LN N PLYMOUTH, MN, 55447-5338 / 37505








[Instructions](#)

Transferee name: Beth Test #35 Spouse/partner name: N/A Origin property address: 3300 FERNBROOK LN N, PLYMOUTH, Minnesota 55447-5338	APEX Relocation ID: 37505 APEX instance ID: 101455	Technical Problems: Should you encounter a technical problem please call the SIRVA CSC at 1-800-999-5917 and select option 1 or send an email to: sirvacsc@sirva.com Questions: If you have any questions or concerns, please contact Beth Ballard at 216-606-7839 or email at ReloSysEmailTrackerDev@sirva.com .
--	---	--

Instructions for submitting your Marketing Activity Report (MAR) information to SIRVA:

- You will receive this task 12 calendar days from the date you last submitted a Marketing Activity Report (MAR). We ask that each MAR task you receive be completed within 48 calendar hours of receipt. Please use the most current and applicable data each time you complete this task.
- Various data for this report will populate from your BMA and/or from past MARs you have submitted (as applicable). **It is important that you review this data and update/edit anything necessary each time you complete this.**
- Once each section is completed (status column notes ) you must click the **SUBMIT** button in the bottom corner of this screen in order to complete this task.

You may complete the sections in any order, but please note that ALL SECTIONS MUST BE COMPLETE BEFORE SUBMITTING YOUR MAR.

Section	Information Required	Status	
Subject Property Information	<ul style="list-style-type: none">• List Price Information• Property Vacancy Information	 Not complete	Edit
Listing Activity	<ul style="list-style-type: none">• Number of Showings• Showing Feedback• Agent/Buyer Open House Information	 Not complete	Edit
Broker Market Analysis Data Review	<ul style="list-style-type: none">• BMA Comparable Listing Updates	 Not complete	Edit
Comparable Properties	<ul style="list-style-type: none">• Comparable/Competing Properties:<ul style="list-style-type: none">◦ Active Listings◦ Pending Sales◦ Sold Properties◦ Closed Properties◦ Expired Listings	 Not complete	Edit
Market Data	<ul style="list-style-type: none">• Subject Neighborhood• Absorption Rate Information• Property Values• Type of Competing Listings• New Construction / REO / Foreclosure	 Not complete	Edit
Strategy Information	<ul style="list-style-type: none">• Most Likely Sales price• Suggested List price• Challenges• Suggested Incentive and Improvements• Communication Plan	 Not complete	Edit
Upload Documents	<ul style="list-style-type: none">• Upload supplemental documents to support MAR:<ul style="list-style-type: none">◦ MLS One-Liners (5% above/below current list price)◦ New Marketing Materials◦ Updated MLS Sheets for Subject Property and any other Comparables◦ Additional Data Deemed Important	 Not complete	Edit

[Submit](#)

[Logout](#) Logged In As: MSP1006

Subject Property Information

Review and update any information in this section as needed:


Transferee name: Deepa L&M6	APEX Relocation ID: 37433	Technical Problems: Should you encounter a technical problem please call the SIRVA CSC at 1-800-999-5917 and select option 1 or send an email to: sirvacsc@sirva.com
Spouse/partner name: N/A	APEX instance ID: 180107	
Origin property address: 1212 SMALLMAN ST, PITTSBURGH, Pennsylvania 15222-4208		

Please note that you must either complete this screen in its entirety OR save your data (by clicking "Save" or "Submit" at the bottom) **within 30 minutes of beginning this screen** or you will lose all data entered.

Questions:
If you have any questions or concerns, please contact Sandy Allen at 216-606-7846 or email at ReloSysEmailTrackerDev@sirva.com.

NOTE:
*Various data on this page will populate from your BMA and/or from past Marketing Activity Reports you have submitted (as applicable).
It is important you review this data and update/edit anything necessary each time you complete this task.*

Please provide SIRVA with updated Subject Property information

Current List Price:	\$	249900.00
Last List Price Change Date:	10/1/2010	
MLS #:	52263-b	
Is the Property Vacant?	<input type="radio"/> Yes <input checked="" type="radio"/> No	

Comparable Properties

- This section will allow you to add comparable properties that have either been listed or sold since the property has been listed.
- These properties should be different than those used originally in your BMA.
- You are required to provide 6 additional properties. Comps must be 3 Active and 3 Closed properties. Cannot use properties submitted with the BMA.
- You may add or delete properties at any time as well.

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Complete Marketing Activity Report (MAR) for 1212 SMALLMAN ST PITTSBURGH, PA, 15222-4208 / 37433

Comparable Properties

Transferee name: Deepa L&M6 APEX Relocation ID: 37433
 Spouse/partner name: N/A APEX instance ID: 180107
 Origin property address: 1212 SMALLMAN ST, PITTSBURGH, Pennsylvania 15222-4208

Technical Problems:
 Should you encounter a technical problem please call the SIRVA CSC at 1-800-999-5917 and select option 1 or send an email to: sirvacsc@sirva.com

Questions:
 If you have any questions or concerns, please contact Sandy Allen at 216-606-7846 or email at ReloSysEmailTrackerDev@sirva.com

Please note that you must either complete this screen in its entirety OR save your data (by clicking "Save" or "Submit" at the bottom) within 30 minutes of beginning this screen or you will lose all data entered.

- Please provide data on **at least 3** properties that you feel are comparable to the subject property.
- Comparable properties provided can be Active, Pending, Sold, Closed or Expired.
- The comparable properties entered will pull to your next Marketing Activity Report for ease in update.
- You can add and delete comparable property data during each Marketing Activity Report.

NOTE:
 Various data on this page will populate from your BMA and/or from past Marketing Activity Reports you have submitted (as applicable).
It is important you review this data and update/edit anything necessary each time you complete this task.

Please provide SIRVA with Comparable Property Information

****These should be different comparable than those used in your BMA (if applicable)****

Comparable Property #1: Closed	Comparable Property #2: Expired	Comparable Property #3: Active
Address: 990 Brown Circle Drive	Address: 8994 Ranch View Lane	Address: 15543 Main Street
MLS#: 99938	MLS#: 744542	MLS#: 49959
Overall rating: Superior (as compared to subject)	Overall rating: Inferior (as compared to subject)	Overall rating: Similar (as compared to subject)
Original List Price: \$ 269900.00	Original List Price: \$ 254900.00	Original List Price: \$ 255000.00
Current List Price: \$ 259900.00	Current List Price: \$ 249900.00	Current List Price: \$ 250000.00
Last List Price Change Date: 10/5/2010	Last List Price Change Date: 9/15/2010	Last List Price Change Date: 10/1/2010
Total Days on Market: 74	Total Days on Market: 126	Total Days on Market: 92
Age of Property: 4	Age of Property: 6	Age of Property: 6
Room Count: Total 10 Bdrms 5 Bath 4.00	Room Count: Total 9 Bdrms 4 Bath 3.00	Room Count: Total 9 Bdrms 4 Bath 3.00
Square Footage: 4553	Square Footage: 3962	Square Footage: Not available
Comments: Recently remodeled baths	Comments: Needs updating.	Comments: Very comparable!
Sale Price: \$ 252500.00	Sale Price: \$	Sale Price: \$
Close Date: 10/19/2010	Close Date:	Close Date:
Clear All Fields	Clear All Fields	Clear All Fields

Strategy Information

- This is one of the most important sections of the MAR
- This section needs to be completed in full for each MAR
- There are four subsections of the 'Strategy Information' section
 - Most Likely Sales Price Update
 - Updated Reasons why property has not sold
 - Suggested Incentives and Improvements
 - Communication Plan

Transferee name: Deepa L&M APEX Relocation ID: 37433
Spouse/partner name: N/A APEX instance ID: 180107
Origin property address: 1212 SMALLMAN ST, PITTSBURGH, Pennsylvania 15222-4208

Technical Problems:
Should you encounter a technical problem please call the SIRVA CSC at 1-800-999-6917 and select option 1 or send an email to: apexcsc@sirva.com

Questions:
If you have any questions or concerns, please contact Sandy Allen at 216-606-7846 or email at ReloSysCmsTrackerDev@sirva.com

Please note that you must either complete this screen in its entirety OR save your data (by clicking "Save" or "Submit" at the bottom) within 30 minutes of beginning this screen or you will lose all data entered.

NOTE:
Various data on this page will populate from your BMA and/or from past Marketing Activity Reports you have submitted (as applicable). It is important you review this data and update/edit anything necessary each time you complete this task.
Please provide SIRVA with updated Suggested List Price and Most Likely Sales Price data

Last Reported Most Likely Sales Price:
Has your Most Likely Sales Price changed?: ☒ Yes ☐ No
New Most Likely Sales Price: \$ 245000
Would you recommend reducing to a different list price at this time?: ☐ Yes ☒ No

Please provide SIRVA with current challenges

Please provide the top 3 reasons why this home has not sold:

1. Freeway noise.
2. School district concerns.
3. General economy and difficulty in obtaining a mortgage.

Please provide SIRVA with suggested Incentives and Improvements

Sirva has made the following incentives available for this property:
(Note: These incentives have been approved by SIRVA and should be actively marketed for this property until the end date shown or until you hear otherwise from SIRVA)

Incentive Description	Incentive Availability End Date
Do you have any suggestions for incentives that may help get this property sold? (Note: These incentives are only good suggestions at this time. You are not authorized to offer these suggested incentives until you have obtained approval from SIRVA)	
Suggested Incentives:	Estimated Costs:
Mortgage Incentives - Assistance in qualifying	\$ 1500
Landscaping allowance to put dense bushes, etc... at far end of yard to h-	\$ 2000
Add Another Suggested Incentive	
Do you have any suggestions for improvements that may help get this property sold? (Note: These improvements are only good suggestions at this time. You are not authorized to complete these suggested improvements until you have obtained approval from SIRVA)	
Suggested Improvements:	Estimated Costs:
Neutralize the downstairs bath walls	\$ 750
Add Another Suggested Improvement	

Please provide SIRVA with your communication plan

Have you communicated all marketing updates and price reduction suggestions to the transferee?:
☒ Yes ☐ No ☐ N/A (Inventory Property)

Date Communicated: 10/4/2010

Discussion Feedback:
Deepa was very responsive to the feedback. I think she herself has many of the same concerns as our

[Cancel](#) [Save](#)

Strategy Information – Suggested Incentives and Improvements

You can make recommendations in this section for what incentives or improvements you think would help sell the property

(If any incentives have been previously approved by SIRVA, you will see it listed and when it is available until)

Please provide SIRVA with suggested Incentives and Improvements

Sirva has made the following incentives available for this property:

(Note: These incentives have been approved by SIRVA and should be actively marketed for this property until the end date shown or until you hear otherwise from SIRVA)

Incentive Description

Incentive Availability End Date

Do you have any suggestions for incentives that may help get this property sold?

(Note: These incentives are only good suggestions at this time. You are not authorized to offer these suggested incentives until you have obtained approval from SIRVA)

Suggested Incentives:

Estimated Costs:

Mortgage Incentives - Assistance in qualifying

\$ 1500

Landscaping allowance to put dense bushes, etc.... at far end of yard to h

\$ 2000

Add Another Suggested Incentive

Do you have any suggestions for improvements that may help get this property sold?

(Note: These improvements are only good suggestions at this time. You are not authorized to complete these suggested improvements until you have obtained approval from SIRVA)

Suggested Improvements:

Estimated Costs:


Neutralize the downstairs bath walls

\$ 750

Add Another Suggested Improvement


NOTE: If an incentive or improvement is approved by SIRVA, you will receive notification from SIRVA. Do not offer an incentive or complete an improvement without written notification from SIRVA. Please market these incentives on all appropriate sites.

Submitting your MAR








- All sections of the MAR must be marked complete ().
- Once all sections are marked complete, you must click the 'Submit' button at the bottom of the page.
- Upon submission, the listing agent and the 'Primary Listing Referral Contact' will receive an email with a PDF copy of the MAR attached.

Transferee name: Beth Test #35 Spouse/partner name: N/A Origin property address: 3300 FERNBROOK LN N, PLYMOUTH, Minnesota 55447-5338	APEX Relocation ID: 37505 APEX instance ID: 181455	Technical Problems: Should you encounter a technical problem please call the SIRVA CSC at 1-800-999-5917 and select option 1 or send an email to: sirvacsc@sirva.com
		Questions: If you have any questions or concerns, please contact Beth Ballard at 216-606-7839 or email at RetoSysEmailTrackerDev@sirva.com

Instructions for submitting your Marketing Activity Report (MAR) information to SIRVA:

- You will receive this task 12 calendar days from the date you last submitted a Marketing Activity Report (MAR). We ask that each MAR task you receive be completed within 48 calendar hours of receipt. Please use the most current and applicable data each time you complete this task.
- Various data for this report will populate from your BMA and/or from past MARs you have submitted (as applicable). It is important that you review this data and update/edit anything necessary each time you complete this.
- Once each section is completed (status column notes ), you must click the **SUBMIT** button in the bottom corner of this screen in order to complete this task.

You may complete the sections in any order, but please note that ALL SECTIONS MUST BE COMPLETE BEFORE SUBMITTING YOUR MAR.

Section	Information Required	Status	
Subject Property Information	<ul style="list-style-type: none"> List Price Information Property Vacancy Information 	 Complete	Edit
Listing Activity	<ul style="list-style-type: none"> Number of Showings Showing Feedback Agent/Buyer Open House Information 	 Complete	Edit
Broker Market Analysis Data Review	<ul style="list-style-type: none"> BMA Comparable Listing Updates 	 Complete	Edit
Comparable Properties	<ul style="list-style-type: none"> Comparable/Competing Properties: <ul style="list-style-type: none"> Active Listings Pending Sales Sold Properties Closed Properties Expired Listings 	 Complete	Edit
Market Data	<ul style="list-style-type: none"> Subject Neighborhood Absorption Rate Information Property Values Type of Competing Listings New Construction / REO / Foreclosure 	 Complete	Edit
Strategy Information	<ul style="list-style-type: none"> Most Likely Sales price Suggested List price Challenges Suggested Incentive and Improvements Communication Plan 	 Complete	Edit
Upload Documents	<ul style="list-style-type: none"> Upload supplemental documents to support MAR: <ul style="list-style-type: none"> MLS One-Liners (5% above/below current list price) New Marketing Materials Updated MLS Sheets for Subject Property and any other Comparables Additional Data Deemed Important 	 Complete	Edit

[Submit](#)

Next MAR Task...

The next MAR task
will now be sent
12 days from this
submission day.
(Refer to Slide 44)



Please Remember - This task is automated and can not be turned off when an offer is made. Updates should continue to be made unless otherwise instructed by the SIRVA Relocation Consultant.

The Offer Process



Amended (Outside Buyer) Offer Presented




- Present **ALL** offers, verbal and written, from an outside buyer to SIRVA and Transferee as soon as possible.
- All of SIRVA's relocation paperwork (see next slide) should be provided to the buyer's agent to ensure we receive all documents in full to be able to execute on the offer.
- Transferee **only verbally** negotiates price and which offer to select.
- With the assistance of SIRVA and agent's expert advice terms and conditions will be negotiated with the Transferee.
- Offer should **NEVER** be signed by Transferee. The contract should be sent over to SIRVA to be signed when **fully negotiated**.
- Provide SIRVA Relocation offer paperwork to buyer's agent to complete. Please submit along with the fully negotiated offer.

Offer Paperwork

- ✓ **SIRVA named as “Seller”**
(Transferee’s name or referring to the “Record Owner” must not appear ANYWHERE in the contract).
- ✓ **SIRVA’s two Contingency Statements must be included in every Purchase Agreement (PA).**
- ✓ **SIRVA Rider**
 - ✓ Page #2-3 must be initialed at the time of the offer.
 - ✓ Must be signed by Buyer.
- ✓ **Notice of Completion and Acceptance of Repairs**
 - ✓ Executed following walk-through and before closing can occur.
- ✓ **SIRVA stamped copy of any local disclosure forms**
- ✓ **Copy of any local disclosure forms signed by the purchaser**
- ✓ **Notice of Affiliated Business Arrangements signed by the purchaser**
- ✓ **SIRVA Property Disclosure, Lead paint, Indoor Air Quality Disclosure, and any other disclosures.**
 - ✓ Signed and dated.
 - ✓ Initialed on each page.
- ✓ **Closing Agent Selection Addendum (CASA) remains negotiable.**
- ✓ **Buyer needs to be qualified to purchase by SIRVA.**
 - ✓ SIRVA must have approval before signing in the form of the Lender letter stating “**Income, assets and credit have been verified.**”
 - ✓ If Lender letter is acceptable, the SIRVA Buyer Financial Qualification Form may not be required.
 - ✓ Cash Only Sales – Proof of funds required upfront.
- ✓ **Earnest Money Deposit check must be Escrowed within 24 Hours of contract execution. Agent must provide evidence to Relocation Consultant of Earnest Money Deposit.**

SIRVA Paperwork Example

SIRVA Rider



Transferee ID:
Authorization ID:

RIDER TO SALES AGREEMENT

Notwithstanding anything contained in the foregoing Sales Agreement of certain improved real Property commonly known as:

**1234 Main Street
Anytown, MN 12345**

(referenced herein as the "Agreement") the parties agree to modify and amend said Agreement in the following respects. In the event of any disagreements between the terms of this Rider and the Agreement, this Rider shall conclusively govern.

1. Financing Contingency

Buyers Down Payment Amount: \$ _____

Buyers Loan Program: Conventional ___; FHA ___; Other ___ (Explain: _____)

A.1(i) This contract is contingent upon the Buyer's ability to obtain written financing approval, substantially in the form of the Buyer Pre-Qualification Form previously provided by SIRVA Relocation LLC ("SIRVA") to Buyer, in the amount as identified in the purchase contract to which this Rider is attached.

A.1(ii) If Buyer is unable, despite best efforts, to obtain such financing approval within _____ days (if blank, (10) days) of the date of this agreement, then he/she shall give written notice thereof to SIRVA. If such notice is not delivered on or before that date, this Rider and the Agreement shall be deemed unconditional with regard to any financing contingency.

A.1(iii) If such notice of Buyer's inability to obtain financing is delivered by said date, then SIRVA shall reserve the right to attempt financing substantially comparable to current market rates or with the terms originally provided by the Buyer within the pre-Qualification form noted above, and with no obligation to the Buyer to accept such terms. Should SIRVA attempt said financing the Buyer shall fully cooperate with SIRVA or with SIRVA's designated Lender to apply for such mortgage. In the event that SIRVA is unable to obtain such mortgage for the Buyer within (10) days from the Buyer's written notice then this contract shall be terminated and all monies there before deposited shall be returned to the Buyer.

B. If Buyer owns a home and this contract is not subject to closing of said home, The Buyer's commitment must indicate that Buyer is qualified without selling said home. If contract is subject to Buyer's home closing, Buyer shall provide SIRVA within **10 days** of acceptance of this contract a copy of a contract on Buyer's home and evidence from Buyer's purchaser(s) satisfactory to SIRVA that said purchasers are qualified to consummate the purchase of Buyer's home. If Buyer fails to provide satisfactory evidence within the specified time or if the evidence is not satisfactory to SIRVA, SIRVA shall have the option of canceling the contract and this Rider by notifying Buyer within five (5) calendar days after expiration of evidence delivery date.

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SIRVA CASA



Transferee ID:
Authorization ID:

**Addendum to Purchase Agreement
Closing Agent Selection Agreement**

The parties agree that the closing, escrow, and title agent shall be SIRVA Settlement, Inc. or its assignee. The parties, because of SIRVA Title's experience in administering relocation home sale transactions, jointly selected SIRVA Title Agency, Inc.

Buyer acknowledges that (s)he has been advised that SIRVA Settlement, Inc. is an affiliated entity to Seller and Buyer has received and read an Affiliated Business Disclosure Form.

A title exam and commitment have been or will be obtained by the Seller through SIRVA Settlement, Inc. or its assignee; the Seller will provide such to the Buyer. SIRVA Settlement, Inc. or its assignee will issue the title insurance policy and manage and direct the escrow and closing process. The closing will take place at a location mutually agreed upon by the Seller and the Buyer. Stewart Title of Tampa has the authority to select a location on behalf of Seller.

The parties commit to provide SIRVA Settlement, Inc. or its assignee with lender information and any other pertinent information needed to facilitate a timely closing.

Any additional title exams including those required by Buyer's lender (other than an update of the Seller's title exam prior to closing) shall be paid for by the Buyer.

Title insurance, closing and escrow charges will be paid by the parties in accordance with the normal and customary split of charges for the area, or as specified in the Purchase Agreement for the Property referenced below.

In the event of any disagreements or conflicts between the terms of this Agreement and the Purchase Agreement or other Riders or Addenda, this Agreement shall conclusively govern.

Property Address: **123 Main St.
Anytown, MN 12345**

BUYERS INITIALS ☐ ☐

Important: By initialing this paragraph and signing this form, the buyer understands that Stewart Title of Anytown has completed the title exam and will issue the title policies. Buyer agrees to inform buyer's mortgage company of this agreement and provide mortgage company a copy of this agreement.

SELLER	BUYER(S)
SIRVA RELOCATION LLC	_____
By: _____	_____
Date: _____	Date: _____

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Offer Checklist for Brokers/Agents

- Included in the SIRVA Listing Paperwork.
- **PLEASE FOLLOW** your 2 page Broker Offer Checklist to ensure your offer is complete BEFORE sending the offer to SIRVA (**NOTE:** Otherwise this will slow down the offer process).
 - **Reminders**
 - All items/paperwork that must be completed and included with the offer.
 - Two (2) Relocation Contingency Clauses **MUST** be included/written into every Purchase Agreement.
 - List of SIRVA Addenda/Disclosures to be provided to SIRVA before an offer will be considered.
 - Items to be collected from buyer (earnest money, home warranty, copy of the purchase agreement on the sale of buyer's home if a contingency is in place).
 - **Using this Checklist at the time of the offer will save time and hassle and escalation to SIRVA's clients.**

Amended Offer

Best Practices

SIRVA only signs one copy

- **The Contract is not considered executed without SIRVA's signature!**
- Do not allow buyers to do inspections before contract execution by all parties unless otherwise agreed by SIRVA.
- **SIRVA needs to sign Contract of Sale with transferee before signing Purchase Agreement with Buyer.**
- **TRANSFEREE SIGNS NO PAPERWORK WITH BUYER!!**
- All paperwork required to be signed by Buyers **before** being submitted to SIRVA
- If Buyer wants to change any language in paperwork – may need SIRVA Legal review.
- “Quick close” is best - No more than 60 day close from contract execution.
- **Cash buyers need to “prove funds are available.”**
- SIRVA discloses all inspections.
- **Closings at a SIRVA preferred location can be negotiated with the Buyer.**
- Dual agency
 - **Not accepted, but may be approved by SIRVA in limited circumstances and with written SIRVA authorization.**
 - **SIRVA must be individually represented by a single agent.**

Amended Offer – Stage 1

Buyer Inspections

- All Inspections and Reports must be disclosed to Buyer.
- Buyer has right to do Inspections within 10 days of contract execution (see SIRVA Rider Section 2).
- Inspections can be extended should Buyer require secondary inspections.
- All timelines must be strictly adhered to in a relocation transaction.
- Seller has “Right To Cure” OR
- **Should Buyer and Seller not come to a final repair agreement, the sale shall then be terminated.**
- Repairs may be resolved by repair or credit.
- **NOTE:** In a relocation transaction, a Buyer cannot terminate without first providing a repair demand for good faith negotiation.

Buyer Financing

- Approval of the Buyer may **NOT** be contingent upon the Buyer’s **SALE** of his/her home.
- Approval of the Buyer **MAY BE** contingent upon the Buyer’s **CLOSING** of his/her home.
- All TRID (Tila Respa Integrated Disclosure Rule) Seller’s Disclosure Rules must be followed.
- SIRVA will offer to provide financing through SIRVA Mortgage.
- Buyer is under no obligation to accept any SIRVA offered financing.
- Again, Earnest Money would be returned if financing approval is either not accepted by the Buyer or not available to the Buyer.

Amended Sale – Stage 2

Closing

- SIRVA closes the first contract transaction (SIRVA – Transferee) three days before the close date with Buyer under the second contract (SIRVA – Buyer). This is applicable for most home sale programs. Please contact your SIRVA Relocation Consultant with any questions.
- Should any issue arise to delay the first contract closing, the second contract closing may be delayed.
- Transferee does not attend either closing.
- SIRVA does not take Record Title when closing the first contract transaction with the transferee.
- When closing the second Contract, nothing survives closing and Buyer will release and sign SIRVA's Notice of Completion and Acceptance of Repairs.

General FYI's...

- Only SIRVA Legal can authorize Early Occupancy Agreements which are very limited and rarely granted.
- Tenancy Agreements are not permitted through SIRVA Contracts unless authorized through SIRVA Legal or Management.
- The Relocation transaction requires two separate contracts which must remain apart and may not reference each other.
- All Relocation Sales remain fully contingent upon clear and marketable title. Should any Title, Lot or Deed issue arise causing Title transfer to fail, SIRVA is not liable for any failure to close.
- SIRVA will make all good faith attempts to cure the reason for the title defect if possible.
- Agent to complete and submit Property Vacate Report to SIRVA upon Transferee vacate.

The Buyout Process (If Applicable to the specific home sale program)



When an outside buyer does not present an offer within a certain time frame, the 'Buyout' process begins (only for program with a buyout option)

The Guaranteed Purchase Offer Process

- Determines a “guaranteed purchase offer” (GPO) that is based on client policy
 - **Most common – Average of two independent appraisals**
- This is transferee’s “safety net”
- Transferee does not need to share with agent
 - **SIRVA will not share value with agent**
- Time frame for accepting is based on client policy
- Once transferee accepts and closes with SIRVA, property goes into “inventory”
- **SIRVA reserves the right to change the listing broker or agent**

Departure Services – Inventory Management

Inventory Management Basics

Goal: To sell the property in the shortest amount of time for the best price

- “Quick” listing switch. BMA to be completed if requested.
- Perform weekly visits to ensure property is in good condition.
- Utility maintenance
 - Be timely with bill or estimated bill submission
 - NOTE: There are NO reimbursements or payments after closing
- Property maintenance
 - Repairs and Improvements, Recommendation on Winterization timeline, Snow Removal, Lawn Cutting,
 - Notification to SIRVA contact of any catastrophic event with the property. (If after hours, you may need to provide mitigation through your appropriate vendors).
 - Subsequent repairs need to be approved by SIRVA before work is started.
- Marketing (including Bi-Weekly Marketing Updates)
- Contract/Closing Management

Inventory Management Wish List



Taking an Inventory Listing

- If requested, complete a BMA within 48 hours of receiving the listing

Marketing

- Be our “Eyes and Ears” in the field
- Be timely with market updates and provide on a bi-weekly basis.
- Provide relevant market data pertaining to the local market
- Make suggestions for repairs/improvements – what is necessary to market home
- Have homework done and supply to support recommendation for suggested list price reductions. This includes sold and listed comparable properties to support the new suggested listed price.

Contracts/Offers

- Review required paperwork needed for offers before sending to SIRVA
- Be the Seller’s advocate – negotiate strongly on our behalf
- Assist with a value when countering
- Make suggestions for what is necessary for buyer inspection repairs

Please continue with Module 3 – Destination Services – Home Finding

