

Agent Interview



Name

Company Name

Address

City

State

Zip

Phone Number

Email

Assistant Name

Assistant Contact

Birthday

Preferred Escrow Officer

Which form of communication do you prefer?

- ☐ Through your assistant
- ☐ Call cell
- ☐ Call office
- ☐ E-mail
- ☐ Text

If we are unable to contact you, what do you prefer?

- ☐ Through your assistant
- ☐ Voice message
- ☐ E-mail
- ☐ Text

How often do you prefer being updated?

- ☐ Daily
- ☐ Weekly
- ☐ Only urgent matters

If you could not be reached, would it be okay to contact your client directly?

- ☐ Yes
- ☐ No

When information is needed for processing, what do you prefer?

- ☐ Always contact me first
- ☐ Contact my assistant
- ☐ Contact my clients directly
- ☐ Email to your client, copy you

Do you consistently use a particular Home Warranty Company on your listings?

- ☐ Yes.
Company: _____
- ☐ No

Who would you like to order your Home Warranty?

- ☐ You
- ☐ Your assistant
- ☐ Title

Our goal is to start all closings on time. If you are detained, is it your request to:

- ☐ Proceed with the closing
- ☐ Wait for your arrival

During peak closings, if a closing is running late, would you prefer:

- ☐ To wait for your closer
- ☐ The next available closer

Who would you like us to contact for your CDA?

- ☐ You
- ☐ Your assistant
- ☐ CDA Department
Contact: _____

Upon disbursement, how would you like your commission to be handled?

- ☐ Check
- ☐ Wire

Any other special requests or suggestions?
