

EQUAL SERVICE REPORT FORMS PROSPECT EQUAL SERVICE REPORT SALES

The National Association of REALTORS® is committed to the provision of equal housing opportunities. The Prospect Equal Service Report is designed to incorporate basic prospect information, needs and wants, properties shown, and a record of service provided. This report will help you keep uniform records for all prospects. The form is not a checklist of service to be provided; the level and type of service you provide will be determined by you firm and should be consistent. The report will, however, document your consistency and provide two fair housing tools:

1. It provides you with evidence of your firm's compliance with the law, which may become an invaluable defense in the event you become involved in a housing discrimination complaint.
2. It allows you and your agents to monitor and review compliance with your fair housing policy and make corrections before you get involved in a discrimination complaint.

You should complete or update the report during or following each contact with the prospect. The report is composed of the following components:

Prospect Information (Space is provided for two adults in a household).

Recording race-Recording the race or national origin of a prospect is invaluable in your efforts to document equal professional service and to monitor your firm's compliance with the law and your equal opportunity policy.

Prospect Needs and Wants (NOTE: the Prospect Equal Service Report for Rentals is recommended for rental prospects).

Housing for older persons-If you receive a request for housing for older persons, record whether a member of the household is over age 55.

Service Provided-Complete the questions financially qualifying the prospect, attaching qualification forms, if any. Then list your contact dates with the prospect.

Property Shown-Complete the three sections on the back of the report. Use space provided to indicate prospect's comments clarifying needs and wants.

Part 1-Record the prospect's initial requests for specific properties and whether these were shown.

Part 2-List any properties or area offered for general considerations, such as a computer printout or a specific community.

Part 3-List properties offered or shown by address. Space is provided to indicate who selected the property shown.

Disposition-Indicate whether the prospect bought property or that no further service was provided. List additional materials, such as community profiles or the Home Guide, that you provided the prospect.

Finally, attach financial qualifying forms, copies of listing printouts, and notes to this report.



This is a form was created by the National Association of REALTORS®.



NATIONAL ASSOCIATION OF REALTORS®
Prospect Equal Service Report

Date: _____ Sales Associate: _____ Office: _____

PROSPECT INFORMATION

Name:			Name:		
Address:			Address:		
Home Phone:		Work Phone:		Home Phone:	
Work Phone:		Work Phone:		Work Phone:	
Owns Now	Rents Now	Must sell to purchase?	Owns Now?	Rents Now?	Must sell to purchase?
Race: *			Race: *		
*For Affirmative Marketing purposes. Information on prospect race is sought to assist in the monitoring of the firm's commitment to equal professional service. Article 10 of the NATIONAL ASSOCIATION OF REALTOR® Code of Ethics states: REALTORS® shall not deny equal professional services to any person for reasons of race, color, religion, sex, familial status, handicap, or national origin. REALTORS® shall not be parties to any plan or agreement to discriminate against a person or persons on the basis of race, color, religion, sex, familial status, handicap, or natural origin.					
Prospect came to us as a result of		Walk In	Past Customer	Sign	Other
Referral		Ad (source)	Phone solicitation	Mail Solicitation	

PROSPECT NEEDS AND WANTS

Prospect wishes to	purchase	rent	possession date
Prospect's price range preference		Purchase price range:	rental: (use from rental)
Prospect requested locations:			
Type of home:	# Bedrooms:	# Baths:	Dining Room Family
Does prospect desire information regarding Housing for Older Persons? If so, is any member of prospect's household over 55?			

SERVICE PROVIDED

Was prospect asked questions regarding his/her finances? If yes, indicate information obtained.	Income	Down Payment	Other (specify)	
Was prospect offered information on financing options? Indicate any rate information provided	Conventional /fixed rate	Adjustable rate	FHA/VA	other (specify)
Did you financially qualify the prospect? ___Yes ___No ___not applicable if yes, attach worksheets if yes, Qualified Purchase Price:	Did you refer the prospect elsewhere for financial qualification? ___Yes ___No ___not applicable if yes, attach worksheets if yes, Qualified Purchase Price:			

Contact dates and comments?



STEERING CHECKLIST

- **RETURN PHONE CALLS**
 - Return all calls
- **BROKERAGE AGREEMENTS**
 - Have a consistent policy regarding usage
 - Discuss the fair housing paragraph in the brokerage agreement which also addresses love letters
- **ASK QUESTIONS TO ESTABLISH CLIENT'S CRITERIA**
 - Don't make assumptions
 - Use objective not subjective criteria
 - No "nice" neighborhood – ask client for specifics - single family? Condo? City? Suburban? Price Point?
 - No "good" schools – direct client to third party source, client determines; good test scores do not equal good schools
- **PROVIDE LISTINGS BASED ON CLIENT'S OBJECTIVE CRITERIA**
 - Client can narrow the list, not you
- **INITIAL MEETING WITH CLIENT**
 - Have a consistent policy
 - ID Required for all, or just some?
 - Pre-Qualification letter required for all, or just some?
 - Property showings – show clients properties in neighborhoods they choose or based upon their objective criteria
- **OFFERS AND COUNTER-OFFERS**
 - Remind clients about previous discussion regarding following fair housing laws, including best practices concerning love letters
 - Trust your gut if you sense red flags in comments/actions
- **SELLER/BUYER WANTS TO DISCRIMINATE**
 - Speak to your broker
 - May need to terminate relationship with client
 - Report to MCCR (<https://mccr.maryland.gov/Pages/Intake.aspx>)
- **BEST PRACTICES**
 - Use this checklist
 - Follow broker policy
 - Call the Legal Hotline if you have questions (443.716.3502)