



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)