

AGENT-TO-AGENT

TAILORED SERVICES



Prepared For:
Real estate agents

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Real Estate Simplified



I'm an agent, transaction coordinator, writer, systems strategist, and trusted partner for real estate professionals. Every successful closing involves hundreds of critical touch points—plus continuous communication, signatures, documentation, and the unexpected. I've crafted my expertise to help new and seasoned agents optimize their business and close deals strategically, one transaction at a time.

With two decades of experience in real estate—and counting—I continue to learn, grow, and support agents and clients through every closing.

Thank you for the opportunity to support your continued success.

Claudia Castillo

Listing & Transaction Coordination

01 What's Covered

- Listing and buyer's file setup and ongoing management.
- Contract-to-close transaction coordination.
- Marketing: flyers, postcards, brochures, and listing materials.
- Client concierge and closing administrative support.
- Seamless handling of documents, signatures, and deadlines.
- Clear, continuous communication with all parties.
- Social media updates to reflect listings and transactions milestones.
- Post-sale touches: testimonial request, closing gift order, and follow-up.



02 How It Works

- **First-time clients:** Start with onboarding to review file details, tasks, and any client-workflow customization.
- **Returning clients:** Submit new transactions via a simple online form; I'll follow up within one business day.
- **Updates:** Real-time updates for you, weekly reports for your clients, secure access to documents anytime.
- **Check-ins:** Easily book a quick call or Zoom to review files.
- **Delivery:** Everything is handled remotely.

03 The Investment

*Custom packages available for teams, offices or high volume.

*Ask about Listing Concierge support for Seattle-area listings.

Buyer TC Fee	Sales Price Range	Seller TC Fee
\$800	Up to \$499,999	\$1,000
\$1,000	\$500,000 – \$999,999	\$1,800
\$1,500	\$1,000,000 – \$1,999,999	\$2,500
\$2,000	\$2,000,000 – \$2,999,999	\$3,200
By Consultation	\$3,000,000 +	By Consultation

04 Small Print

- My fees are based on the final sales price within the specified price brackets. To protect against small fluctuations in the sales price, if the final sales price falls just below a bracket threshold by up to \$10,000, the agreed flat fee for the higher bracket will still apply. This ensures consistent service value and avoids unexpected fee reductions due to minor price changes.
- There is a one-time, non-refundable \$299 setup fee to customize your onboarding checklist and align with your office's systems and procedures.
- Agent's personal deals 10% off.
- Rates are secured once services are booked.
- Payment: Services can be paid through escrow at closing.
- If you'd like to discuss payment options, just reach out.
- Cancellation Fees: If something falls through, I totally understand—it happens. These fees simply help honor the time and work already put in:
 - For Active listings \$199 If you're planning to re-list, let's talk.
 - For Pending listings \$299 If you're planning to re-list, let's talk.
 - For Pending buyers \$149 Up to 2 offers per buyer.
 - Cancellation fees are agent-paid, not billed through escrow.

Monthly Brokerage Support

01 What's Covered

- Work collaboratively alongside your agents to help them avoid common pitfalls.
- Dedicated hours for listing prep, submitting office paperwork, and transaction coordination guidance.
- Help agents stay organized, troubleshoot files, and keep deals moving smoothly.
- I review your brokerage's forms to tailor to your agents' workflow.



02 How It Works

- **Booking:** Easily book your hours online. Once booked and paid, I arrive during your scheduled hours in the format you choose—in person, via Zoom, or a combination.
- **Scheduling:** Agents can drop in or schedule ahead within the hours you've booked; Zoom links and reminders are sent in advance.
- **Shared Hours:** Hours can be shared among different offices within the same brokerage.
- **Flexibility:** Choose a different package each month as needs change.
- **Timing:** Schedule different days and times each month.
- **Delivery:** Use your hours in person (Seattle offices only), via Zoom, or a combination—switch between formats as needed.

*Custom hourly packages available.

*This service is available only for teams and offices.

03 The Investment

Hours Per Month	Monthly Fee
8 Hours Monthly (≈2 hrs/week)	\$900
12 Hours Monthly (≈3 hrs/week)	\$1,250
16 Hours Monthly (≈4 hrs/week)	\$1,650
20 Hours Monthly (≈5 hrs/week)	\$2,000

04 Small Print

- No contract required — cancel or pause anytime.
- Hours do not roll over.
- Rates are secured once services are booked.
- Payment: Hours are brokerage-paid, not through escrow.
- If you'd like to discuss payment options, just reach out.

B.Y.O. (Build Your Own) Buyer & Seller Checklist **Workshop**

01 What's **Covered**

- **Buyer's Checklist** – Covers all stages of the buyer journey:
New Lead, Touring, Under Contract, After Closing
- **Seller's Checklist** – Covers all stages of the seller journey:
Pre-List, Active, Pending, Sold
- Build comprehensive, reusable checklists with every step, action, and milestone needed to complete listings and transactions—tailored to your processes.
- Plug-and-play items that can be easily added to your workflow or task management systems.
- **Learning & Refresher:** Each phase reinforces key steps in the buying and selling process, providing practical knowledge while building your checklists.



02 How It **Works**

- **Duration:** Buyer checklist workshop — 2 hours | Seller checklist workshop — 3 hours.
- **Wrap-Up:** Includes 30 minutes for final Q&A, share resources, and key takeaways.
- **Participants:** Individual or small group (up to 4 agents) for focused attention.
- **Tools:** Checklists are built in Word—simple, flexible, and ready to integrate into your workflow or task management systems.
- **Delivery:** Available in person at your brokerage, at co-working offices I book (no extra charge), or via Zoom.

03 The **Investment**

*Custom packages available for brokerages and/or to create or update **workflows**.

B.Y.O. Checklist	Cost
Buyer's Checklist	\$299
Seller's Checklist	\$399
Bundle: Buyer + Seller Checklists	\$599

04 Small **Print**

- Workshop is non-transferable.
- Offered only to real estate agents (Workshops for real estate assistants will be available in 2026).
- No-shows can be rescheduled; fees are non-refundable.
- Rates are secured once services are booked.
- Payment: Workshops are brokerage-paid, not through escrow.
- If you have an active or pending transaction, you can pay through escrow at closing.
- If you'd like to discuss payment options, just reach out.

The Real Estate Blueprint

01 What's Covered

A complete roadmap with tools to support every listing and transaction, designed to fit seamlessly into your workflow:

- **Tech & Systems:** Email, communication, cloud system, MLS, Showing Time, Supra.
- **Admin:** Brokerage paperwork, commissions, gifts, testimonials.
- **Calendar Hub:** Daily–yearly planning, closings deadlines/milestones.
- **Clients:** CRM, referrals, leads, follow-ups; client presentations, listing prep, showings.
- **Listings & Closings:** Checklists for listing and transaction coordination.
- **Third Parties:** Title/escrow, lenders, inspectors, vendor rolodex.
- **Social Media & Marketing:** Profiles, content, property marketing, templates, branding.



02 How It Works

- **Duration:** Varies by business complexity—typically 4–8 weeks following the initial consultation.
- **Intake:** I begin by assessing your current systems and collecting key information, then build your blueprint behind the scenes—implementing changes seamlessly with minimal disruption.
- **Implementation:** We'll hold a series of focused sessions centered on practical, actionable steps, giving agents hands-on experience to refine and apply processes directly within their workflow.
- **Final Review:** We'll evaluate your new blueprint, address questions, and ensure agents feel confident and equipped for long-term results.
- **Ongoing Support:** Includes 30 days of post-completion support—up to 30 minutes per week—for fine-tuning and continued guidance.
- **Tools & Deliverables:** All materials are designed to be used in Word, Google Docs, or Canva—simple, flexible, and easy to update. Your blueprint, checklists, and templates are fully editable and ready to integrate into your workflow or task management tools.
- **Delivery:** Implementation sessions are available via Zoom or in person (Seattle-based only).

03 The Investment

*Custom packages available for brokerages to create or update workflows.

The Real Estate Blueprint	Cost
Existing Workflow Optimization	Starting at \$800 per Agent
Full Build-Out	Starting at \$1,300 per Agent

04 Small Print

- Rates are secured once services are booked.
- Payment: The RE Blueprint is brokerage-paid, not through escrow.
- If you have an active or pending transaction, you can pay through escrow at closing.
- If you'd like to discuss payment options, just reach out.

Onboarding & Training

01 What's Covered

Comprehensive training and onboarding for your team, designed to streamline processes, and strengthen support for your business:



- **Systems & Tools:** Training on tech, communications, and workflow.
- **Admin:** Calendar Management, day-to-day operations and organizational processes.
- **Client & Transaction Support:** Best practices for client management, listing, and transaction coordination.
- **Vendor & Third-Party Coordination:** Strategies for effective collaboration with external partners.
- **Marketing & Brand Management:** Overview of property marketing, social media, and branding workflows.

02 How It Works

- **Duration:** Varies by team size, learning styles, and workflow complexity—typically 2–4 weeks from initial consultation.
- **Intake:** I begin by assessing your team's current skills, workflows, and business priorities to identify focus areas for training.
- **Implementation:** Sessions are tailored and interactive, giving your team hands-on experience to learn and apply processes confidently.
- **Final Review:** We evaluate progress, address questions, and ensure your team feels equipped to perform efficiently and independently.
- **Ongoing Support:** Includes 30 days of post-training guidance—up to 30 minutes per week—for follow-up, clarification, and fine-tuning.
- **Tools & Deliverables:** All materials are designed to be used in Word, Google Docs, or Canva—simple, flexible, easy to update, and ready to integrate into your workflow or task management tools.
- **Delivery:** Onboarding and training is available via Zoom or in person (Seattle-based only).

03 The Investment

*Custom packages for multiple hires and training.

Onboarding + Training	Cost
For Existing Hires	Starting at \$900 per person
For New Hires	Starting at \$1,500 per person

04 Small Print

- For new hires: Agents handle hiring at their own cost; I assist by drafting job ads, supporting the hiring process, and providing training.
- Rates are secured once services are booked.
- Payment: Onboarding + training is brokerage-paid, not through escrow.
- If you have an active or pending transaction, you can pay through escrow at closing.
- If you'd like to discuss payment options, just reach out.

WHAT YOU CAN COUNT ON

Business Hours

My standard business hours are aligned with banking and escrow schedules. I strive to manage all services within this timeframe.

Availability & Flexibility

Real estate requires flexibility. I'll always be happy to do my best to support you and your client after hours—including evenings, weekends, or holidays—but extended availability is not guaranteed.

Independent Contractor

I operate as an independent contractor, working alongside you—not as an employee, assistant, partner, or representative of the agent or their clients.

Meetings & Calls

All meetings are cell phone-free to keep us focused. There's a 15-minute grace period to honor other commitments—just let me know if you need to reschedule.

Agent Collaboration & Follow-Up

Your timely, professional communication helps keep things moving. I handle the coordination, but the agent remains responsible for the client and file. If a client or party goes unresponsive, I'll make up to 3 follow-up attempts before looping you in.

Confidentiality

All client and transaction information is treated as strictly confidential and shared only with the parties directly involved.

Design & Marketing Add-On

For services related to marketing and social media, I use my own Canva templates and can integrate your branding. You'll be able to choose from three core designs. If you prefer, I can work with your templates or platform instead. Custom template creation—on your platform or mine—is available at \$45/hour (2-hour minimum). Agent-paid, not billed through escrow.

THANK YOU! LET'S CONNECT.



I prioritize quality by working with a limited number of clients at a time. Let's connect to discuss your goals and answer any questions—so we can both feel confident we're the right fit to move forward together.



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