



# PROPOSAL KIT SAMPLE

## Real Estate Agency Listings Sample Proposal

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Cover Letter, Title Page, Table of Contents, Client Summary, Location Analysis, Teamwork, Community, About Us, Services Provided, Amenities, Listings, Our Clients, Back Page

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Carl and Aimee Matherson  
4922 West Side Drive  
Tacoma, WA 98402

Dear Mr. and Mrs. Matherson,

Thank you for entrusting us with the search for your new home.

We specialize in making affordable deals for first time homeowners and in matching middle income families with their dream homes.

Based on our initial consultation, we have selected three homes in the West Peninsula neighborhood as good matches for your family's wish list. Note that this is only the beginning of our working relationship—if one of these is not your dream home, we can show you many more in a variety of neighborhoods. We're here to assist you in your quest to find the right place for your active family.

We believe you'll find the enclosed proposal informative and interesting. After you've had a chance to read and consider the information, give us a call to set up your first tour. We can't wait to get started working with you!

Sincerely,

Wendy Walkner  
Owner  
Walkner Real Estate  
555-555-5555  
[wendy@WalknerRealEstate.com](mailto:wendy@WalknerRealEstate.com)  
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# Proposal

## Recommended Real Estate Listings for the Matherson Family

Prepared for: Carl and Aimee Matherson and Family

Prepared by: Wendy Walkner  
Owner





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# Client Summary

At Walkner Real Estate, we specialize in making affordable deals for first time homeowners and in matching middle income families with their dream homes. Are you ready to find your new home?

*“We specialize in matching families with their dream homes.”*

## The Objective...

The Matheson family wants to purchase a home that meets the following needs:

- ▶ Need #1: A minimum of three bedrooms, and preferably four or more
- ▶ Need #2: A minimum of 2.5 bathrooms, and preferably 3
- ▶ Need #3: Indoor and outdoor space for a large, active family

## The Opportunity...

The West Peninsula neighborhood offers many parks and recreational opportunities, as well as a diverse community and affordable housing. Purchasing a home there will help the Matheson family meet the following goals:

- ▶ Goal #1: Live in a diverse community with a variety of ethnic groups and income levels that reflects your blended family
- ▶ Goal #2: Live in a house with room to grow
- ▶ Goal #3: Have easy access to local schools and parks

## The Solution...

Walkner Real Estate will select homes in the area that match the Matheson family’s wish list and budget, starting with the three properties presented in this proposal. Then, working as a team, we should:

- ▶ Recommendation #1: Get pre-qualified for a mortgage. This will make the process of purchasing a home faster
- ▶ Recommendation #2: Tour the properties recommended by Walkner Real Estate
- ▶ Recommendation #3: Purchase the house of your dreams!





The following properties have been selected for your consideration, based on our initial consultation.

You stated a desire for an affordable home that will comfortably accommodate your family of six, with a minimum of three bedrooms and two and a half baths. You also wanted homes that were close enough to green spaces that your children could safely walk to parks and play fields.

We believe that the West Peninsula neighborhood has everything you're looking for. See the Community page for more about that. Within the West Peninsula neighborhood, we have selected the following homes for your consideration:

▶ 1405 Roaming Ridge Drive

Listing #: 80852

Description: 4 bedrooms, 3.5 baths, living room, family room, spacious kitchen, 2 car garage

Square Feet: 2570

Features: Peek-a-boo views of bay from the living room and kitchen, large fenced back yard, close to bus routes

Cost: \$388,950

▶ 1257 Aristotle Court

Listing #: 59786

Description: 3 bedrooms, 3 baths, recently remodeled kitchen, living room, basement recreation room and office

Square Feet: 3200

Features: This has room to grow because the large daylight basement area could be used as is or easily remodeled to include an additional bedroom or two.

Cost: \$372,950



▶ 900 Castle Lane

Listing #: 43215

Description: 5 bedrooms, 4 baths, large kitchen, dining room, living room, recreation room, and large workshop in 3-car garage

Square Feet: 3500

Features: This property is a wonderful opportunity for the right family—like yours! It is a huge home that needs some tender loving care to bring it back to its original luxurious state. It is structurally sound and in an ideal location next to a park, and includes many high-end finishing touches such as fine kitchen cabinets and valuable light fixtures.

Cost: \$315,000

## Notes

These are the three properties currently on the market that we believe best suit your needs as you described them in our initial meeting. But there are many more properties to choose from, and we're just getting to know each other. Let's set up a tour of these three as soon as possible so you can share your thoughts and expectations with us. We know we can match you with the perfect house!





# Amenities

The West Peninsula neighborhood offers the following amenities that match your “wish list.” All are within easy walking or biking distance of the houses we recommended on the Listings page.

## ▶ Westside Park

This huge park has a public swimming pool (open June-September), two baseball fields, a big picnic area, and hiking trails along the beach.

## ▶ North Point Park

This is a beach park with nearly three miles of sand to play in and a paved walkway to walk, skate, or bike along.

## ▶ Smith, Firwood, and Wildside Parks

These small parks all have green space for games and modest playground and picnic areas.

## ▶ Peninsula Junction

The Junction is the heart of the West Peninsula area. It features a large grocery store, a hardware store, and many specialty shops such as bakeries, gift shops, and florists. There are also four restaurants to choose from, and a small movie theatre.

## ▶ Peninsula Sports Arena

This is a popular neighborhood hang-out, with ice skating in the winter and roller skating in the summer. It features plenty of seating for spectators and a track and inner field area used for local school track meets and soccer games.

## ▶ West Peninsula Schools

The West Peninsula schools include: Bartlett Elementary, Corbison Elementary, Forest Middle School, Prentice High School, and the Nevison Academy (private). All West Peninsula schools have established credentials of academic excellence.

## Summary

The West Peninsula neighborhood is ready to welcome your family. See the Community page for more information about the friendly folks that live in the neighborhood.







# Location Analysis

Why did we recommend the West Peninsula neighborhood and the three homes for you? We chose the West Peninsula neighborhood for its proximity to the downtown area and your new job. It's an easy bus or (in summer) ferry ride from West Peninsula to downtown Seattle. In addition, West Peninsula has excellent schools and a large selection of parks, which makes it a perfect place for an active family. Our recommendations of homes are based not only the physical characteristics of each house, but also on the following location analysis of each property.

## ▶ 1405 Roaming Ridge Drive

**Location:** This home is on a ridge, offering partial views of the bay. In addition, it has a large fenced back yard, as do neighboring properties. It's only a couple of blocks to bus routes, which makes it convenient for Carl and Aimee to get to work and for any member of the family to get to the shopping center or recreation area.

**Security:** Roaming Ridge Drive is well lighted and all properties have adequate off-street parking, thus lessening the opportunities for car prowls and traffic incidents.

**Infrastructure:** Less than half a mile away is the Peninsula Junction area, with all the shopping and services you might need.

## ▶ 1257 Aristotle Court

**Location:** This home is on a hillside and offers a spacious, partially finished daylight basement that could easily be remodeled to accommodate the needs of an active family. Bus stops are less than a half mile away in any direction. The property is situated between Smith Park, which has good playground equipment, and Westside Park, which has play fields and hiking trails and beach access. It's a great area for adults and kids alike.

**Security:** The streets in this area are well lit and regularly patrolled after dark by the local police.

**Infrastructure:** Peninsula Junction is only three-quarters of a mile away.

## ▶ 900 Castle Lane

**Location:** This large property is adjacent to North Point Park, so it's a short walk to the beach for playing in the sand or skating or riding along the paved walk there.

**Security:** The streets in this area and the pathway along the beach are well lit and regularly patrolled by the local police. Because the beach can be a big draw for partiers during the warm months, the local police maintain a mobile station at the beach from May through September. This police presence ensures quiet and safety in this popular area.

**Infrastructure:** Peninsula Junction is less than a mile away.



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