FREE PARTICIPANT EDITION

ON-MARKET AGENT CALL PLAYBOOK

THE CONVERSATION + HANDOFF SCRIPT

THE OBJECTIVE

Open direct. Learn the facts. Confirm potential openness. Get the current mortgage statement. Hand it off.

SCAN TO CONNECT

BUILT FOR

Anyone bringing Gordon an on-market opportunity—not just experienced acquisition reps.

GORDON SRAN

Investor • Operator • Deal Partner

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1 PREP THE CALL

TEN MINUTES. FIVE SIGNALS. ONE OBJECTIVE.

Prepare enough to ask informed questions. Do not confuse a data estimate with a verified mortgage statement.

01	**PROPERTY**	Write one true observation from the listing—condition, layout, occupancy clue, or price history.
02	**RENT**	Note a conservative long-term rent range and the source you used.
03	**DEBT**	Review any preliminary loan estimate only to shape questions. It is not proof of balance, rate, or payment.
04	**EXIT**	Know why the property might fit a cash path, a buy-and-hold path, or neither.
05	**OBJECTIVE**	Your win is potential openness plus the current mortgage statement—not final terms on the first call.

CALL STANDARD

High energy means warm, confident, and unhurried—not loud. Have the listing open, a place for exact notes, and the follow-up link ready.

OPEN DIRECT. GET THE NEXT YES.

You are not closing the deal on this call. You are earning permission for the next conversation and document.

01	PREP	Write one true property observation from the listing before you call.
02	OPEN	*High energy: "[Agent name], [Your name] here. I'm calling about [address]. Is that still available?"*
03	DISCOVER	*Ask condition, occupancy, rent, and timing. THINK INTERNALLY: "What does the seller need this sale to solve?"*
04	CASH PATH	*"If we pay cash, the price has to account for repairs, holding costs and resale risk."*
05	CREATIVE PIVOT	*“If cash forces the price too low… what if we could offer something closer to list price—would the sellers consider letting us take their existing payments over?”*
06	PAUSE + ASK	*Stop talking. If there is interest: "I need a current mortgage statement to underwrite accurately."*
07	FOLLOW UP	Send a short SMS recap with the two paths and the exact documents requested.

THE WIN

POTENTIALLY OPEN + CURRENT MORTGAGE STATEMENT

NO PRESSURE. NO PROMISES.

3 DISCOVER THE FACTS

ASK FOUR THINGS. LISTEN FOR ONE.

The questions gather facts. Internally, listen for the seller priority or constraint that the sale needs to solve.

01 **CONDITION**

"Beyond what I can see in the listing, is there anything material I should account for—roof, HVAC, plumbing, electrical, foundation, or disclosures?"

02 **OCCUPANCY + TIMING**

"Is it vacant, seller-occupied, or tenant-occupied? What timing matters to the seller?"

03 **RENT**

"Do you know the current rent or what it could reasonably rent for long term? Are there HOA or rental restrictions?"

04 **SELLER PRIORITY**

"What are the sellers hoping happens with this listing in the next 30–60 days? If it does not sell on the current terms, what would they likely do next?"

DO NOT GUESS AT DIVORCE, RETIREMENT, RELOCATION, OR OTHER PRIVATE DETAILS.

EXPLAIN THE TRADEOFF. THEN PAUSE.

The purpose is clarity—not a promise, a final offer, or a complete negotiation.

01 / CASH PATH

"If we pay cash, the price has to account for repairs, holding costs and resale risk."

02 / CREATIVE PIVOT

“If cash forces the price too low… what if we could offer something closer to list price—would the sellers consider letting us take their existing payments over?”

IF THEY ASK FOR A NUMBER

"Totally fair. I do not want to throw out a number before Gordon's team accounts for condition and debt. Let me finish gathering the facts."

IF THEY SAY YES OR MAYBE

Stop talking. Then ask: "I need a current mortgage statement to underwrite accurately. Would it be okay for Gordon's team to follow up after we review it?"

IF THEY SAY NO

"Understood. What part does not fit for the seller right now? If circumstances change, may I check back?"

BOUNDARY

Do not promise that everyone wins, that commissions or closing costs are covered, or that final terms are approved before underwriting.

5 FOLLOW UP

SEND THE RECAP WHILE CONTEXT IS FRESH.

Keep it short, name both paths, request the exact document, and set a clear next touch.

SMS / YES OR MAYBE

Hi [Agent], [Your name] here. Thanks for the call on [Address]. We discussed (1) cash that accounts for repairs, holding and resale risk, or (2) something closer to list price if the seller is open to letting us take their existing payments over. Please send the current mortgage statement through Gordon's approved secure channel so his team can underwrite accurately.

SMS / SOFT FOLLOW-UP

Hi [Agent]—quick check-in on [Address]. Has the seller shared any feedback on the two paths we discussed? If they are potentially open, the next step is the current mortgage statement.

EMAIL / DOCUMENT REQUEST

Subject: [Address] — current statement for underwriting

Hi [Agent], thank you for the information on [Address]. Please send the current mortgage statement through the approved secure intake so Gordon's team can verify the loan and determine whether the buy-and-hold path is viable. We will follow up after review.

SEND SENSITIVE LOAN DOCUMENTS ONLY THROUGH GORDON'S APPROVED SECURE CHANNEL.

SUBMIT THE FACTS.
GORDON'S TEAM TAKES IT FROM THERE.

A clean handoff prevents the agent from repeating the conversation and gives underwriting a reliable starting point.

REQUIRED FOR A CLEAN HANDOFF

01 Submitter name, email, phone, and role

02 Property address and Zillow link

03 Agent first name, last name, phone, and email

04 Brief notes explaining the situation

05 Mortgage statement OR balance, rate, and monthly PITI/payment

HELPFUL IF AVAILABLE

01 List price, days on market, and price changes

02 HOA or rental restrictions

03 Disclosures, photos, floor plan, or access notes

04 Known loan arrears or seller constraints—only if volunteered

HAND THE DEAL TO GORDON

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Warm the relationship. Verify the document. Hand off the opportunity.