ON-MARKET
SUBTO WORKBOOK

AGENT WARM-UP + DEAL HANDOFF

Warm the agent. Confirm potential openness.
Collect the current mortgage statement.
Hand it off.

THE WIN

The agent says, 'We are potentially open to it,' and sends the current mortgage statement.

A HANDOFF TOOL FOR ANYONE BRINGING AN OPPORTUNITY

GORDON SRAN

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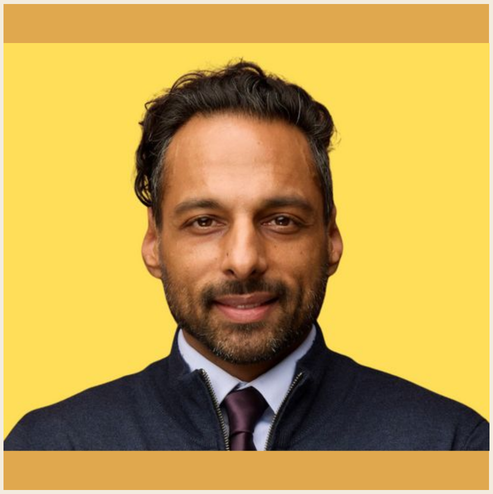
Find. Verify. Hand off.



GORDON SRAN

INVESTOR - OPERATOR - DEAL PARTNER

SCAN TO HAND OFF A DEAL

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1 THE HANDOFF OUTCOME

YOUR JOB IS SIMPLE

Anyone bringing Gordon an on-market opportunity can create a warm, documented introduction. Gordon's team evaluates and structures it after the handoff.

1 WARM THE CALL

Use the direct opener. Learn what the seller needs the sale to solve.

2 CONFIRM OPENNESS

Get a clear 'potentially open' or 'send me more information' response.

3 GET THE STATEMENT

Request the current mortgage statement. A data estimate is not the document.

4 SUBMIT THE HANDOFF

Send the required contacts, Zillow link, situation note and verified mortgage facts.

YOU DO

- Be accurate and direct.
- Write down the agent's exact words.
- Ask permission for Gordon's team to follow up.
- Upload documents securely.

GORDON'S TEAM DOES

- Verify debt, title, HOA and layout.
- Apply the acquisition rules and underwrite.
- Propose final terms and protections.
- Decide whether to pass, follow up or advance.

THE HANDOFF STANDARD

You have not negotiated or approved the deal. You have confirmed potential openness, received the statement and created permission for Gordon's team to continue.

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.

1 PREP	Write one true property observation from the listing before you call.
2 OPEN	*High energy: "[Agent name], [Your name] here. I'm calling about [address]. Is that still available?"*
3 DISCOVER	*Ask condition, occupancy, rent, and timing. THINK INTERNALLY: "What does the seller need this sale to solve?"*
4 CASH PATH	*"If we pay cash, the price has to account for repairs, holding costs and resale risk."*
5 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?”
6 PAUSE + ASK	*Stop talking. If there is interest: "I need a current mortgage statement to underwrite accurately."*
7 FOLLOW UP	Send a short SMS recap with the two paths and the exact documents requested.

THE WIN: 'POTENTIALLY OPEN' + CURRENT MORTGAGE STATEMENT

NO FABRICATED PAIN. NO PRESSURE. NO PROMISES. NO HIDDEN LENDER RISK.

REQUIRED CONTACT SNAPSHOT

Every field on this page is mandatory for a lead submission. Use complete contact information so Gordon's team can take over without tracing missing details.

SUBMITTER

YOUR NAME *		YOUR ROLE *	
YOUR EMAIL *		YOUR PHONE *	

PROPERTY

PROPERTY ADDRESS *	
ZILLOW LINK *	

LISTING AGENT

FIRST NAME *		LAST NAME *	
PHONE *		EMAIL *	

THE MINIMUM CONTACT STANDARD

Property address + Zillow link + agent first and last name + agent phone + agent email. No partial contact handoffs.

*** MANDATORY FOR LIVE SUBMISSION**

The live intake will mark missing fields, block submission and guide the user to the first incomplete item.

GIVE UNDERWRITING A USABLE START

A mortgage statement is preferred. Without it, all three manual loan fields are mandatory. Add a short situation note either way.

BRIEF SITUATION NOTES *

CHOOSE ONE COMPLETE MORTGAGE PATH

Attach the current mortgage statement OR complete remaining balance, interest rate and total monthly PITI/payment below.

☐ Current mortgage statement attached

REMAINING BALANCE *

INTEREST RATE *

MONTHLY PITI / PAYMENT *

OPTIONAL FACTS: CONDITION, OCCUPANCY, RENT, TIMING, ACCESS OR KNOWN CONSTRAINTS

OPTIONAL SUPPORTING DOCUMENTS

☐ Floor plan / room measurements

☐ Seller disclosures

☐ Photos / inspection material

☐ Known HOA / title information

5 SUBMIT THE PACKAGE

PASS THE SUBMISSION GATE

The live intake will not accept a lead until every mandatory component below is complete.

MANDATORY

- [ ] Submitter name, email, phone and role
- [ ] Property address and Zillow link
- [ ] Agent first name, last name, phone and email
- [ ] Brief situation notes
- [ ] Mortgage statement OR balance + rate + monthly PITI/payment

SECURE HANDLING

Upload statements only through the approved intake. Do not place loan numbers, statements or seller personal information in public notes, email blasts or shared chats.

GORDON'S REVIEW FILTERS - YOU DO NOT NEED TO CALCULATE THESE

No HOA. Approximately 7-10 viable rooms. All-in entry at or below 10% of list price. Generally 19-30%+ projected stabilized cash-on-cash after honest expenses.

HAND THE DEAL TO GORDON

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Scan to connect with Gordon and start the handoff process.

WARM THE RELATIONSHIP. VERIFY THE DOCUMENT. HAND OFF THE OPPORTUNITY.

Find. Verify. Hand off.