client guide

Elevating the Experience Through Uncompromising Service

SILICON tc VALLEY

January 2025

NILDA MEDINA

"For me, it's about more than transactions—it's about creating trust, elevating the process, and ensuring every interaction leaves a lasting impression.

The way details are managed can shape the entire experience, turning what might feel overwhelming into something effortless.

With an unwavering commitment to excellence, I strive to ensure that agents and their clients feel confident and supported at every step."

welcome

WE LOVE WHAT WE DO!

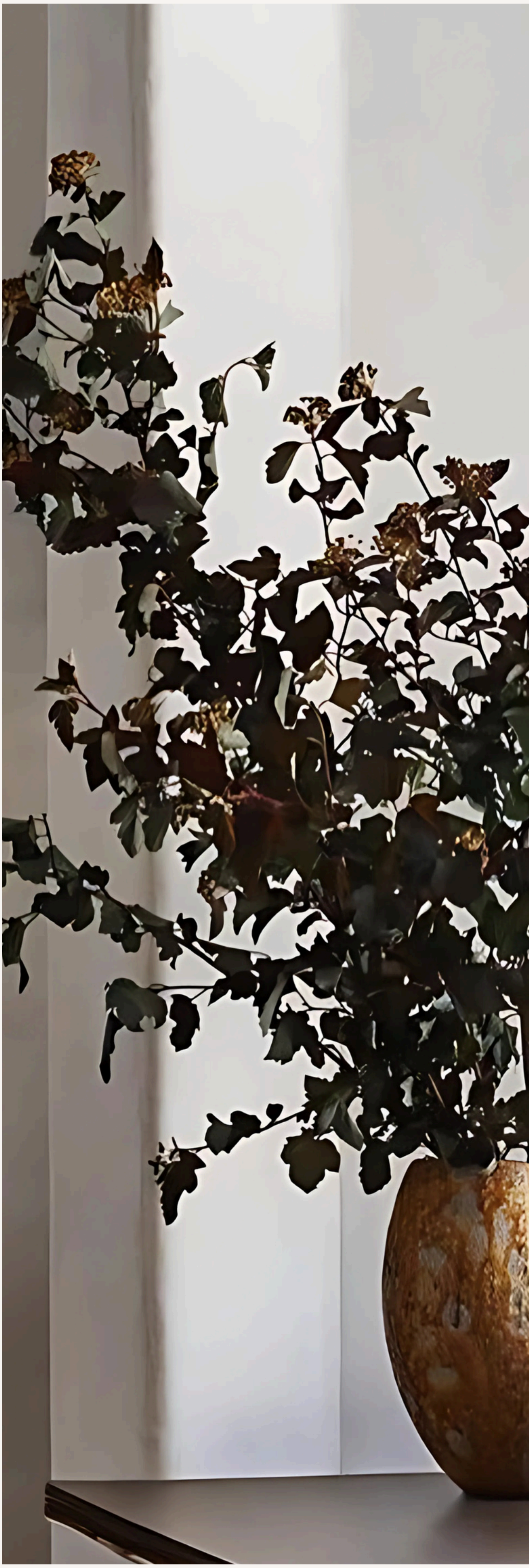
At Silicon Valley TC, we believe that every agent we work with deserves more than just support—they deserve a partner who is equally invested in their success. Our dedication to extraordinary service reflects a genuine commitment to helping agents thrive while delivering exceptional experiences to their clients.

We are truly grateful for the opportunity to connect with you. It's our mission to make your work easier, your clients happier, and your transactions smoother, all while fostering a relationship built on trust and mutual respect.

Thank you for considering Silicon Valley TC. We look forward to building a partnership that supports your success in every way.

Nilda E Medina

TABLE OF CONTENTS



THE BENEFITS OF PARTNERING WITH US

- **Unmatched Expertise Backed by Certifications:** As a ***C.A.R. Certified Transaction Coordinator, Certified Probate and Trust Specialist, and ZipForms Certified Trainer***, I bring specialized knowledge and skills to every transaction. These credentials reflect my commitment to staying ahead of industry changes and providing the highest level of expertise to support your success.

- **We Work When You Work:** Real estate doesn't follow a 9-to-5 schedule, and neither do we. Our extended hours ensure that you have the resources you need, whenever you need it, so your transactions proceed smoothly and without delays.

- **Immediate Responsiveness:** Timely communication is essential for a smooth transaction. Whether it's a text, call, or email, we make it our priority to respond promptly, ensuring you and your clients always feel well-informed.

- **Supporting Your Transaction Process:** From drafting counter offers and addenda to preparing essential documents, we manage the details with care while ensuring that you, as the agent, remain in control of the transaction.

- **Proactive File Management:** We oversee every aspect of your transaction, ensuring broker compliance, meeting legal requirements, and keeping all parties informed. Our meticulous approach ensures a seamless and dependable experience throughout every transaction.

- **Secure Document Retention:** We securely store your transaction files for five years, giving you peace of mind and convenient access whenever you need them.

- **No Hidden Fees:** Our pricing is straightforward and transparent, with no hidden costs or unexpected charges—even in the event of a cancellation. You can trust that our commitment to clarity extends to every aspect of our partnership.

TAILORED SOLUTIONS

We're passionate, engaged, and focused on delivering exceptional results for you and your clients. Our services offer a range of options, allowing you to tailor the level of support to your specific needs.

Standard Services

- **Listing Management**
- **Contract-to-Close Services**
    - Residential 1-4 units
    - Residential 5+ units
    - New Construction Home
    - Vacant Land

Additional Services

- **Offer & Listing Contract Draft**
- **Compliance Review**
- **Extended Hours**
- **Post-Close Package**
- **Bookkeeping Service**

Bilingual Solutions

- I ensure **Spanish-speaking** clients feel fully informed and confident throughout the process by communicating in the language they're most comfortable with, creating an inclusive experience that builds trust.

services

The following pages provide a detailed overview of the services available and pricing options designed to meet your unique needs.

PRICING OVERVIEW

Below, you will find a summary of our core services, thoughtfully designed to meet your essential needs. Each service offers flexibility, allowing agents to tailor the level of support to their unique requirements.

For a comprehensive description of each service, we invite you to review the pages that follow.

Seller Representation Services – Res. 1-4 units

Listing Preparation Services

- Document Audit and Disclosure Preparation — $ 150
- Pre-Listing Services Scheduling and Coordination — $ 125
- MLS Management — $ 100

Contract to Close Services

- Contract to Close — $ 500
- Contract to Close - Dual Agency — $ 600

Post-Contract Services

- Document Preparation — $ 100

Buyer Representation Services – Res. 1-4 units

Contract to Close Services

- Contract to Close — $ 500

Post-Contract Services

- Buyer Ordered Inspection Scheduling and Coordination — $ 125
- Document Preparation — $ 100

Exclusive Bundle Savings – Res. 1-4 units

Seller

- All Listing Prep + Contract to Close + Post-Contract Services — $ 825
- All Listing Prep + Contract to Close + Post-Contract Services-Dual — $ 900

Buyer

- Contract to Close + All Post-Contract Services — $ 650

LISTING MANAGEMENT

01

Listing Management

Initiate File & Disclosure Package Preparation $150

- Confirm the Listing Agreement and all related documents are fully executed.
- Obtain the broker compliance checklist and initiate the listing file in the brokerage's preferred software platform.
- Coordinate with the preferred Escrow/Title company to open pre-sale escrow.
- Order the Preliminary Title Report for Seller vesting confirmation and the Natural Hazard Disclosure Report, reviewing for fire hazard zone compliance.
- Request Escrow order the HOA document package from the management company, if applicable.
- Prepare a detailed timeline of pre-listing events for efficient coordination.
- Send an "Introduction and Next Steps" email to the Sellers to ensure readiness.
- Gather all state, county, and city-specific documents, along with any required brokerage advisories, into a comprehensive disclosure package.
- Ask Sellers to complete the disclosures via Glide and sign electronically via DocuSign.
- Verify all documents are fully executed before proceeding to the live listing phase.
- Add the completed disclosure package to Homelight-Disclosures.io with agent-provided offer presentation instructions.

Listing Preparation Services $125

- Coordinate Logistics: Order and manage the installation and removal of the yard sign post, sign, flyer box, and riders as the file progresses.
- Coordinate Pre-Sale Preparations: Schedule inspections (Home, Pest, Roof, Sewer Lateral, etc.), staging consultations, house cleaning services, and photography to ensure the property is market-ready.
- Prepare for Launch: Create an offline MLS listing, organize media (photos, videos, floor plans), and ensure all required documents are uploaded. Collaborate with the agent for final edits before the listing goes live.
- Engage and Inform Sellers: Provide reminders about Carbon Monoxide and Smoke Detector installation and Water Heater strapping requirements. Share updates, active listing links, and assist with modifications as needed.

MLS Management $100

- Create an offline MLS listing and ensure it's ready for activation.
- Organize and upload photos and other media into the MLS in an engaging order.
- Add a link to required documents, such as disclosures and inspections, in the MLS.
- Enter Open House information for syndication to other websites.
- Collaborate with the agent to review and approve the MLS input before going live.
- Email the seller a link to the active listing once live in the MLS.
- Obtain seller signatures for listing modifications as needed.
- Update the MLS status during the listing period and finalize at close of escrow.

Ask About Our Exclusive Bundle Savings

CONTRACT TO CLOSE

02

Contract-to-Close $500

Residential 1-4 units

Initiate File

- Audit all documents to ensure they are fully executed.
- Verify Co-Op Agent and Brokerage information with the DRE.
- Initiate transaction in Brokerage software platform and upload executed documents.
- Coordinate the opening of escrow and obtain the escrow number for the file.
- Email the agent a file audit summary, including a customized timeline.
- Send "Congratulations - You're Under Contract' email to Clients.
- Send an "Introduction" email to Co-Op Agent, Escrow/Title and the Lender including timeline and contractual documentation, to ensure clarity and alignment.

Earnest Money Deposit

- Confirm earnest money deposit has been received by Escrow and obtain signed acknowledgement page.
- Verify escrow package has been sent to Clients; confirm receipt by Escrow.

Disclosures

- Review Preliminary Title Report to confirm vesting, CC&Rs, and any exceptions.
- Review Natural Hazard Disclosure Report, reviewing for fire hazard zone compliance.
- Add any Brokerage specific disclosures to ensure full broker compliance.
- Ensure timely delivery/receipt of Disclosure Package to include Seller Disclosures, Agent Visual Inspection, Preliminary Title and Natural Hazard Disclosure Reports, any inspection reports and HOA document package to Agents and Client.
- Email disclosures and Consumer Educational Booklets to Clients and Agent for their review.
- Send disclosure package to Clients and Agent via DocuSign for signatures.
- Review completed disclosure package to ensure all items required for compliance are included and fully executed.
- Remind all Agents of contingency removal deadlines to prevent delays.
- Obtain fully executed contingency removals as specified by the Purchase Agreement.

Financing & Appraisal

- Confirm the Lender has ordered the appraisal.
- Coordinate the appraisal appointment with Seller's Agent.
- Follow-up on the appraisal and loan status.
- Confirm the Lender has received the appraisal report at "Full Value".
- If the appraisal report is below full value, obtain a price reduction or change of terms addendum and provide the executed copy to Escrow and Lender.
- Remind Agents of upcoming contingency removal deadlines to prevent delays.
- Obtain fully executed contingency removals as required by Purchase Agreement.

continued....

Contract-to-Close

Residential 1-4 units

Inspections and Other Contingencies

- Follow-up with Agent regarding inspection status and negotiations, if any.
- Confirm receipt of Agent's Visual Inspection Disclosure.
- Manage contingencies, including Seller's purchase of a replacement property or Buyer's sale of a contingent home, ensuring timely resolution.
- Remind all Agents of contingency removal deadlines to avoid unnecessary delays.
- Obtain fully executed contingency removals as required by Purchase Agreement.

Closing

- Ensure we have a fully executed "Full Contingency Removal" from Clients.
- Confirm the File is "Clear to Close" with Lender.
- Obtain the commission demand from the brokerage, or prepare it and send it to Escrow if not provided.
- Order the Home Warranty as specified in the contract and send invoice to Escrow.
- Confirm Homeowners Insurance purchase and send the binder to Escrow.
- Confirm Escrow has all the necessary documentation; confirm funding and close of escrow dates.
- Request and review estimated settlement statement, forwarding it to the Agent for review.
- Audit and discuss file status with the Agent before close of escrow, and submit the file for Broker compliance review.
- Send a "Getting Ready to Close" email to Clients with a Utility Service Provider list, requesting they transfer utilities and forward mail by the possession date.
- Request Sellers leave keys, remote controls, and any manuals in agreed upon location.
- Confirm Buyer's final verification of property appointment with Listing Agent.
- Confirm Seller repairs and provide receipts for Buyer acknowledgment and signature.
- Confirm receipt of Verification of Property form from Clients.
- Confirm Client's signing appointment with Escrow.
- Confirm Loan docs have arrived at Escrow.
- Confirm the loan has funded and the deed has recorded.
- Coordinate key exchange arrangements with Agent.
- Review Broker Closing Package from Escrow and upload it to the Brokerage software platform.
- Send "Congratulations" email to Clients, including closing packet, if ordered by Agent.
- Send "Thank You" email to Co-Op Agent, Escrow/Title and Lender.

650-492-1412 | hello@siliconvalleytc.com

ADDITIONAL SERVICES

03

Additional Services

Offer & Listing Contract Draft $50

- Agents can conveniently request the preparation of purchase or listing agreements by completing a brief form.
- Agreements are prepared based on the specified terms and provided for the agent's review and approval. Once approved, the agreements are finalized for signature, ensuring a seamless process. The agent retains their direct role by presenting the finalized agreements to their clients or cooperating agent.

Post-Contract Document Preparation $100

- Prepare Addenda, Amendments, Contingency Removals, Request for Repairs, Notice to Perform, etc.
- All documents are prepared with agent-provided verbiage, ensuring that your specific requirements and language are accurately reflected.

Inspection Coordination $125

- Schedule any inspection appointments requested by Client; reschedule as necessary.
- Confirm appointment details and property access with the Seller or Listing Agent.
- Obtain and distribute reports to the Agent and Clients for their review.
- Send all reports via DocuSign for Client acknowledgement.

Compliance Review $175

For those agents who like to manage their own transactions but need assistance with the paperwork this service package includes:

- Complete review of all documents to ensure Broker and state compliance.
- Cross-reference contract with property details from the MLS to ensure accuracy.
- Provide a detailed list of missing or incomplete documents to the Agent..
- Complete a second and final review of file and notify the agent of any concerns.
- This service level does not include direct contact with your Clients.

Extended Service Hours $75/ File

To better serve you, we provide extended business hours, offering an additional **30 hours** of availability each week.:

Monday - Friday 8:00 am - 8:00 pm*
Saturday 9:00 am - 3:00 pm*
Sunday & Holidays 3:00 pm - 7:00 pm*
*Pacific Time

Additional Services

New Construction | Contract to Close

$400

- Encompasses all the foundational offerings of the **Contract to Close** package.
- Request Builder sign Broker referral agreement; verify commission amount is either a flat amount or percentage.
- Confirm the Buyer's names on the loan approval letter corresponds to the names on the sales contract.
- Confirm pricing information; including house, lot, upgrades, etc.
- Remind Buyers to purchase Homeowner's Insurance and send the binder to Escrow.
- Send "Pre-Close" letter to Buyer including utility list; confirm signing appointment.
- Send "Congratulations" email to Buyers upon close of escrow.

Vacant Land – Contract to Close

$400

- Includes all services provided in the **Contract to Close** package.
- Send "Pre-Close" letter to Buyer; confirm signing appointment.
- Send "Congratulations" email to Buyers upon close of escrow.

Residential 5+ Units

$850+

- Encompasses all the foundational offerings of the **Contract to Close** package.
- Send "Pre-Close" letter to Buyer including utility list; confirm signing appointment.
- Send "Congratulations" email to Buyers upon close of escrow.
- Assist with any Tenant-related documentation required for the transaction.

Post-Close Service Package

$75

- This package helps you leave a lasting impression with Clients.
- Order closing gift on Agent's behalf. (Gift is paid by Agent)
- Beautifully branded brochure including:
  - Home Warranty Brochure and Service Contract
  - Change of Address Checklist with hyperlinks to USPS, DMV, IRS, Voter Registration etc.
  - List of Utility Service Providers with hyperlinks
- Request Customer Satisfaction Survey and Testimonial
- Copies of all contracts, addenda, disclosures and inspections
- Settlement Statement emailed to client in January

YOUR ROLE

Negotiation

This is a critical part of the transaction process and should be managed by the licensed professional who has an agency relationship with the client. As an experienced agent, your expertise ensures the best possible results for your client.

Draft Documents

To ensure all documentation accurately reflects the parties' intentions and agreements, the responsibility for finalizing and approving all documents, rests with you, the Real Estate Agent. We are here to assist in the drafting process, while you retain control over the transaction.

Explain Documents to Clients

Discussing the content, relevance, importance or significance of the documents, disclosure forms, advisories, etc., with a client should be handled by the Agent.

Section 10131 -California Business and Professions Code

SILICON VALLEY

SYSTEMS & TOOLS

01 ZipForms

02 DocuSign

03 Glide

04 Homelight

05 Skyslope

06 Google Suite

07 tcDocs

08 KW Command

09 Business Tracker

10 QuickBooks Online

Client Feedback

Robert Rickert

★★★★★

Nilda was an absolute pleasure to work with! She made sure that all deadlines were met, both by reminding people on our side of the transaction but also staying on top of the other side. A true professional, she has vast knowledge of contracts and is extremely helpful where it is appropriate. Nilda saved the day for me when I was in a pinch and I would recommend her to anyone in the industry!

Temple Callahan

★★★★★

Nilda is absolutely indispensable! She is conscientious, diligent, and exceptionally organized, with a level of commitment that is truly unmatched. I confidently told my colleague he wouldn't regret working with her because she's so much more than a transaction coordinator—she's an invaluable partner. Her dedication and expertise elevate every transaction, making the entire process smoother and more efficient.

Sarah Bergen

★★★★★

Nilda has strong command of the real estate transaction knows what needs to be done, excellent communication with her agents, the clients, and all parties to the transaction, as well as the ability to collaborate and create systems that free up her agents to spend more time gaining more business. Nilda is an asset to any agent, and the transaction making them run and most importantly close efficiently.

Lionel Madamba

★★★★★

Nilda goes above and beyond to ensure that every transaction runs smoothly. Her ability to manage the complexities of the process with professionalism and efficiency gives me and my clients peace of mind throughout what can sometimes be a stressful journey.

WHAT TO EXPECT

Responsive Communication

Responsiveness is essential for building strong relationships, trust, and rapport. It reflects how clearly and directly we respond to you and your clients.

Customer Service Excellence

We are committed to creating memorable client experiences that make a difference and help you stand out. Our desire is to make each client feel valued and appreciated throughout their transaction journey.

Dedication & Integrity

Whether it's launching a new listing, managing a contract or refining established contract processes, we do it all. We are dedicated to your success and committed to delivery exceptional service.

HOW TO GET STARTED

We ensure our Transaction Management Service aligns perfectly with your needs, respecting your valuable time and resources.

Our Process

To get started, follow these simple steps...

1. If you have yet to **schedule a discovery call,** we invite you to do so to discuss your unique transaction management needs.
2. Review and sign the Engagement Agreement, offering flexibility to cancel anytime without fees, ensuring transparency and peace of mind.
3. Complete the **New Client Onboarding process** to streamline our services to meet your specific needs.

HOW TO CONTACT US

Email & Phone

We respond to calls and emails on weekdays during standard business hours.

650-492-1412 | hello@siliconvalleytc.com
www.siliconvalleytc.com

Business Hours

Standard
Monday - Friday 9:00 am - 5:00 pm PST
Closed Saturday, Sunday & Banking Holidays

Extended*
Monday - Friday 8:00 am - 8:00 pm PST
Saturday 9:00 am - 3:00 pm PST
Sunday & Holidays 3:00 pm - 7:00 pm PST
*Available for an additional fee

Response Time

We will acknowledge all service requests within two hours of receipt. Your file will be onboarded the same day you submit it if received prior to 2:00 PM and is updated as information is received from clients, partners and vendors.

great customer experiences don't happen by accident, they happen by design.

SILICON VALLEY

Photo Credit: AI generated - @reverse.orientalism, @houseliftdesign & @vinh.qp
Photo Credit Designers - @reschio, @alpine.manpr, @a-gaut & @vivir.design