

MEMO

To: Melody Minton-Stephens & Brenda Kiefer
From: Candice Harrell
Subject: Documents for B&M Group - Final Drafts
Date: May 2, 2024

Dear Melody and Brenda,

As we discussed in our initial meeting, I've redesigned B&M Group's logo and designed three documents: a branded folder, an informational flyer, and a branded referral form. The goal was to create documents to enhance your business's brand and help build your real estate network. You can find all the documents at the end of this memo.

All the designs were created using the RE/MAX color scheme and carefully selected typefaces. For the redesigned logo (2), the goal was a modern look that conveys experience and sophistication. It is used on all the other designs. The branded folder (3) serves as a place for clients to store documents during the home-buying process. The informational flyer (7) features B&M branding and provides contact details and area info for buyers at open house events. Because it will be used in multiple municipalities, I've included it in a reusable template format(8). The branded referral form (9) was designed to create strong branding while being easy for affiliates to use. Since this form will be used to send and receive referrals through email and mail, I've included two versions: a printable PDF and a fillable PDF.

Usability testing was done on the branded referral form because it was identified as the most important for driving new revenue. The test and post-test survey results showed that the five test participants found the form well-designed and easy to use. However, there were still areas for improvement. Final revisions included increasing the size of the fees in "Referral Agreement Details," enlarging checkboxes, aligning fillable checkboxes and text fields with the PDF design, decreasing the logo size, and increasing the phone number line in the "Sending Agent Information" section.

Thank you so much for the opportunity to work on these designs. I can't wait to hear what you think of them. I hope that they're a help to you as you continue building your real estate business.

Please reach out to me if there are any further revisions you'd like.

Sincerely,
Candice Harrell
512-507-7651
candicenharrell@gmail.com





BMGATX.COM



CONTACT US

Brenda Kiefer

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Melody Minton-Stephens

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Moving Checklist

ONE MONTH BEFORE MOVING

- Make arrangements to hire a mover or rent a truck.
- Collect packing supplies: boxes, box cutters, bubble wrap, labels, markers, newspaper, packing tape, scissors.
- Make babysitting and/or pet care arrangements for moving day.
- File a change of address form at the Post Office.
- Arrange for a transfer of all dental, medical and school records, as necessary.
- Transfer auto, home, and medical insurance.
- Keep all move related documents in one place.

TWO WEEKS BEFORE MOVING

- Cancel or transfer all utilities (cable, satellite, internet service, electric, gas, telephone, water).
- Check with your provider about cell phone service in your new location.
- Transfer prescriptions to a pharmacy near your new location.
- Transfer bank accounts.
- Pack up items in attic, garage and storage areas.
- Confirm arrangements with movers or truck rental.

ONE WEEK BEFORE MOVING

- Begin packing boxes, labeling each as you fill it.
- Empty, defrost and clean freezer and refrigerator.
- Pick up items, such as dry cleaning, prescriptions, etc.

THE DAY BEFORE MOVING

- Do a final check of cabinets, closets and drawers.
- Take out all trash.
- Fully charge all cell phones.
- Confirm arrangements with movers or truck rental.

THE DAY OF THE MOVE

- Exchange contact information with the movers in case you need to get in touch while en route.
- Keep jewelry and other valuables with you.
- Prepare a box of supplies that you'll need on move in day: bedding, chargers, clothing, cleaning supplies, disposable dishes, eyeglasses, pet food, prescriptions, toilet paper, toiletries, trash bags, etc.
- Do a final check before locking doors. Confirm you turned off the furnace/air conditioner, lawn sprinklers and lights. Make sure you have given the keys, including mail and garage door opener, as your realtor directs.



COMMUNITY INFORMATION

Community Features

HIKING TRAILS
COMMUNITY CENTER
PARKS
COMMUNITY POOL
SPORTS FACILITIES

LEANDER ISD

Tarvin Elementary School
1280 Logan Del Way
512-570-8200

Danielson Middle School
1061 Collaborative Way
512-570-3900

Glenn High School
1320 Collaborative Way
512-570-2000

Utilities

PHONE | CABLE | INTERNET

AT&T.....866-636-8883

ELECTRICITY

Pedernales Electric.....888-554-4732

NATURAL GAS

Atmos Energy.....888-286-6700

WATER

City of Leander.....512-259-1142

WASTE

City of Leander.....512-259-1142

YOUR REALTORS

Brenda Kiefer

Phone: 504-441-8171

Email: Brenda@bmgatx.com

Melody Minton-Stephens

Phone: 512-507-6820

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COMMUNITY INFORMATION

Community Features

HIKING TRAILS
COMMUNITY CENTER
PARKS
COMMUNITY POOL
SPORTS FACILITIES

ISD

Elementary School

INSERT ADDRESS
XXX-XXX-XXXX

Middle School

INSERT ADDRESS
XXX-XXX-XXXX

High School

INSERT ADDRESS
XXX-XXX-XXXX

Utilities

PHONE | CABLE | INTERNET

INSERT.....XXX-XXX-XXXX

ELECTRICITY

INSERT.....XXX-XXX-XXXX

NATURAL GAS

INSERT.....XXX-XXX-XXXX

WATER

INSERT.....XXX-XXX-XXXX

WASTE

INSERT.....XXX-XXX-XXXX

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Brenda Kiefer

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Melody Minton-Stephens

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Email: Melody@bmgatx.com





AFFILIATE REFERRAL FORM

RECEIVING AGENT INFORMATION

Office Name: _____
Group: _____
Address: _____
City: _____ State: _____
Zip Code: _____ Country: _____
Email: _____

SENDING AGENT INFORMATION

Agent Name: _____
Office: _____ Tax ID: _____
Address: _____
City: _____ State: _____
Zip Code: _____ Country: _____
Email: _____
Phone: (Office) _____ (Cell) _____

CLIENT INFORMATION

Name: _____ Email: _____
Address: _____ City: _____ State: _____ Zip Code: _____
Phone: (Cell) _____ (Home) _____ (Work) _____
of Adults in Move: _____ Additional Info: _____
of Children in Move: _____

CURRENT PROPERTY INFORMATION

Current Homeowner? ☐ Y ☐ N ☐ ?
First Time Home Buyer? ☐ Y ☐ N ☐ ?
Client Pre-qualified? ☐ Y ☐ N ☐ ?

Lender Name (if yes): _____
Reason for Move: _____

DESIRED PROPERTY INFORMATION

Price range: _____ to _____
Est. Down Payment: _____
Wants: Monthly Payment: _____ Square Footage: _____
Bedrooms: _____ Baths: _____
Property type: ☐ Single-family ☐ Condo/Townhome ☐ Other: _____
Schools: ☐ Elementary ☐ Middle School ☐ High School ☐ College

Preferred Area(s): _____

REFERRAL AGREEMENT DETAILS

Referral fee is based on sales price + % of the fee collected at closing.

- 25% - \$300,000 to \$499,999
- 30% - \$500,000 to \$999,999
- 35% - \$1,000,000 & up

Sending Agent Signature: _____ Date: _____
Receiving Agent Signature: _____ Date: _____
Additional Info: _____



AFFILIATE REFERRAL FORM

RECEIVING AGENT INFORMATION

Office Name: _____
Group: _____
Address: _____
City: _____ State: _____
Zip Code: _____ Country: _____
Email: _____

SENDING AGENT INFORMATION

Agent Name: _____
Office: _____ Tax ID: _____
Address: _____
City: _____ State: _____
Zip Code: _____ Country: _____
Email: _____
Phone: (Office) _____ (Cell) _____

CLIENT INFORMATION

Name: _____ Email: _____
Address: _____ City: _____ State: _____ Zip Code: _____
Phone: (Cell) _____ (Home) _____ (Work) _____
of Adults in Move: _____ Additional Info: _____
of Children in Move: _____

CURRENT PROPERTY INFORMATION

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First Time Home Buyer? ☐ Y ☐ N ☐ ?
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Receiving Agent Signature: _____ Date: _____
Additional Info: _____

