

Your Real Estate Journey

A clear overview for buyers, sellers, rightsizers and clients coordinating a sale and purchase

A real estate move is easier when you can see the path ahead. This roadmap gives you the overall sequence. Your exact path may be shorter, may include extra steps or may run on two tracks when you are buying and selling at the same time.

Who this is for	Buyers, sellers, rightsizers and clients who may be buying and selling.
When it is used	At the beginning of our work together and whenever you want to see where we are in the process.
What happens next	We will first clarify representation and how we will work together. Then we will confirm your goals, the stages that apply and your immediate next steps.

THE SIMPLE RULE

We will focus on the decision in front of you, confirm what needs to happen next and bring in the right professional whenever a question falls outside real estate services.

Stages 1-3 | Getting oriented

1	Initial conversation We discuss the broad reason for your move, what you are considering and whether working together may be a good fit. Your focus: Share the broad picture. You do not need to have every answer yet.
2	Representation and services Before we move into confidential details, advice or ongoing real estate services, Rob will explain representation, his duties and any required disclosures or service agreement. Your focus: Read the official documents, ask questions and keep copies.
3	Consultation We clarify goals, timing, decision-makers, concerns, communication preferences and the type of help you may need. Your focus: Complete only the relevant Consultation Questionnaire.

Stages 4-8 | Preparing and deciding

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Planning and preparation

We build a practical plan for financing, property preparation, timing, an onward purchase or a coordinated buy-and-sell move.

Your focus: Choose priorities and identify information or professional advice still needed.

5

Search or listing preparation

Buyers refine the search and viewing plan. Sellers complete agreed preparation, documentation and listing decisions.

Your focus: Confirm the criteria, timing, access and decisions guiding the next stage.

6

Showings

Buyers view and compare properties. Sellers prepare for access, showings and feedback.

Your focus: Use each showing to learn; avoid changing strategy based on one reaction alone.

7

Offers and negotiation

An offer sets out price, dates, deposit, included or excluded items, conditions and other terms. Advice will be specific to the situation and the written contract.

Your focus: Ask questions, consider the whole offer and make decisions without being rushed.

8

Accepted offer, rescission and due diligence

An accepted offer creates a contract. It may contain subjects or other conditions. For many B.C. residential purchases, the buyer also has a separate three-business-day statutory right to rescind; exemptions and a rescission fee apply.

Your focus: Confirm every deadline and use the appropriate professionals for due diligence.

Stages 9-12 | Moving to completion

9	Subject removal and firm sale When contract conditions are dealt with in writing, the sale may be described as firm. Any applicable statutory rescission period is separate, so Rob will confirm the exact status and remaining deadlines. Your focus: Keep the signed documents and follow the confirmed completion plan.
10	Completion The legal and financial transfer is handled through the buyer's and seller's lawyer or notary, together with the parties and their other professionals. Your focus: Respond promptly and independently verify any request to transfer funds.
11	Possession and moving Keys and access are provided according to the contract. Buyers and sellers complete their move, handover and first-day priorities. Your focus: Follow the confirmed possession arrangements; do not assume early access.
12	Post-closing support Rob checks in, helps close practical loops and remains available for real estate questions and appropriate referrals. Your focus: Keep key documents and let Rob know if a follow-up item is outstanding.

What each person controls

You	Your goals, decisions, information you provide, questions you ask and instructions you give.
Rob	Real estate guidance, process coordination, communication, negotiation support and keeping agreed next steps visible.
Other professionals	Advice and work within their fields, such as legal, lending, inspection, insurance, tax or moving services.

WHAT HAPPENS NEXT We will clarify representation before discussing confidential details or moving into advice. Then we will identify the stages that apply and create a short personalized next-step summary. Clear Guidance. Confident Decisions.
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