SHANE YOUR MORTGAGE GUY · OPEN HOUSE RESOURCE CENTER

Open House Preparation Checklist

A professional checklist for the weeks before, the day of, and the follow-up after a Michigan open house.



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Last reviewed November 10, 2026

Use this list to prepare a Michigan open house so visitors can explore the home and leave with clear, educational financing resources. These resources are free. They are not conditioned on referring any business to Shane.

One to two weeks before

- Confirm listing details, showing instructions, and who will host.
- Decide whether a licensed loan officer will attend. If Shane attends, agree on a greeting plan and a place for resources that does not block traffic through the home.
- Print this toolkit: sign-in sheet, visitor QR card, down-payment flyer, first-time buyer FAQ, concessions sheet, and payment-planning worksheet.
- Fill in the listing-agent and brokerage names on the sign-in sheet header before you set it out.
- Review the conversation guide. Agree that no one on site will quote a rate, payment, or approval.
- If you will use a co-branded flyer, confirm brokerage approval, permission to use any logo or photo, and that Ease Mortgage marketing approval has been considered.
- Walk the property for access, lighting, and a safe place for a resource table.

The day before

- Print extra copies and test pens. Charge any tablet used only to display public pages — do not collect information in an unapproved digital form.
- Place the QR card and flyers so they are visible without crowding a doorway.
- Reread fair-housing reminders: greet every visitor consistently, offer the same materials, and do not make assumptions about who can buy.
- Confirm the sign-in disclosures are on the first page, with both consent boxes left unchecked.

Day of the open house

- Set out the sign-in sheet and explain, briefly, that signing is optional and that each checkbox is a separate choice.
- Offer the same educational resources to every visitor who wants them.
- If a visitor asks about rates, payments, or whether they will be approved, refer them to a licensed loan officer or to the visitor page via the QR card. Do not guess.
- Do not collect income, Social Security numbers, bank balances, or other sensitive financial information at the door.
- Keep the conversation about the home first. Financing is a support topic, not a condition of touring.

After the open house

- Follow up only with visitors who consented, and only on the channel they checked.
- Share a visitor's information with Shane only if that visitor opted in for financing information.
- Use the follow-up templates. Include an opt-out on texts (Reply STOP to opt out) and a physical address plus an unsubscribe path on emails.
- Note any document requests and send them promptly, or introduce the visitor to Shane if they asked for that introduction.

Compliance reminders. Treat every visitor consistently (fair housing). Do not quote rates or payments without current, verified terms. Co-marketing and shared costs must follow RESPA Section 8 and your brokerage and lender policies. Educational handouts are not conditioned on referrals.



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