SHANE YOUR MORTGAGE GUY · OPEN HOUSE RESOURCE CENTER

Realtor and Lender Open-House Planning Checklist

A shared timeline, role list, and compliance reminders for agents and the loan officer.



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A shared plan helps the listing agent, any buyer's agent on site, and a loan officer stay in their own lanes. These resources are free. They are not conditioned on referring any business to Shane.

When	Agent role	Loan officer role
1–2 weeks before	Confirm host schedule, print educational resources and the sign-in sheet with brokerage names filled in, review the conversation guide, and request brokerage approval for any co-branded piece.	Confirm whether attendance is requested, share current public educational links (not a custom rate quote), and review any co-branded draft for lender marketing policy.
Day before	Reprint extras, test the QR card with a phone, and reread fair-housing and consent reminders.	Reconfirm arrival time if attending. Do not send a property-specific payment flyer unless current verified terms and advertising review are in place.
Day of	Greet every visitor consistently, explain optional sign-in and separate checkboxes, keep the home the focus, and refer pricing questions to a licensed loan officer.	If present, introduce yourself, offer educational resources, and take detailed questions offline or by appointment. Do not quote a rate or payment at the door unless you are using current verified terms in a compliant way.
After	Follow up only with consent; share visitor information with the lender only when the visitor opted in for that contact; honor STOP and email unsubscribe requests.	Contact only visitors who opted in for financing information, using approved language, or wait for the visitor to call.

Compliance reminders for both roles

- **RESPA Section 8 (12 CFR 1024.14).** Do not tie educational materials, attendance, or payment of marketing costs to a referral of settlement-service business. If costs are shared, each party should pay a proportionate share of actual costs under brokerage and lender policy.
- **Fair housing.** Same greeting, same materials, same process for every visitor.
- **Consent and privacy.** Collect only what the sign-in sheet asks for. No sensitive financial data at the door. Use each opt-in separately.
- **Advertising and quotes.** No rate, APR, or payment in a handout or conversation without current verified terms and compliant advertising review. The co-branded flyer editor will not add those fields.
- **Michigan brokerage identification.** Agent advertising must include the employing broker's licensed name and the broker's telephone number or street address, with the brokerage name in equal or greater type size (MCL 339.2512e).



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