



KW BAY AREA
ESTATES
KELLERWILLIAMS

Brian Schwatka, Realtor®
& Transition Specialist

362 Irving Avenue, San Jose • 1761 Klamath Drive, Salinas • 34546 Falls Terrace, #17, Fremont • 238 Coy Drive, #4, S
Vineyard Lane, Saratoga • 3695 Stevenson Blvd , #C325, Fremont • 1269 Bouret Drive, #4, San Jose • 47112 Warm Sp
Los Gatos • 477 Lomer Way, Milpitas • 1855 Palm View Place, #118, Santa Clara • 3310 Kimber Court, #135, San Jose
San Jose • 749 Center Avenue, Pacheco • 1023 Leona Court, San Jose • 517 Woodstock Way, Santa Clara • 510 Marble
San Jose • 812 N 14th Street, San Jose • 470 Navaro Way, #00112, San Jose • 1041 Leona Court, San Jose • 3730 Mir
Jose • 14281 Esther Drive, San Jose • 1676 River Birch Court, San Jose • 5038 Russo Drive, San Jose • 2182 Galveston
San Jose • 10525 Center Avenue, Gilroy • 2328 Orlando Drive, San Jose • 4746 Eagle Lake Drive, San Jose • 1021 Cum
Jose • 224 E Rincon Avenue, Campbell • 448 Barnegat Lane, Redwood City • 1434 Kiner Avenue, San Jose • 2294 Cottl
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San Jose • 260 Pine Wood Lane, Los Gatos • 2176 Willester Avenue, San Jose • 3096 Arthur Court, Santa Clara • 683 E
• 214 W Rincon Avenue, Campbell • 431 Nottingham Way, Campbell • 2177 Esperanca Avenue, Santa Clara • 1654 P
Sunnyvale • 4953 Adair Way, San Jose • 1400 Elwood Drive, Los Gatos • 13 N Peter Drive, Campbell • 600 Pennsylvan
Avenue, San Jose • 6136 Yeadon Way, San Jose • 5602 Mesa Road, Gilroy • 5967 Post Oak Circle, San Jose • 5262 W
• 301 Los Pinos Way, San Jose • 2110 Park Avenue, San Jose • 130 Smoke Tree Court, San Jose • 30722 Churchill Co
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Sweetbriar Drive, San Jose • 839 Hermiston Drive, Osborne Court, Morgan Hill • 1746
Drive, San Jose • 994 Edmonds Way, Sunnyvale

**Experience
Matters**



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TESTIMONIALS

Welcome



“Rooted in Service & Education”

Brian Schwatka has been a top-producing Realtor and Transition Specialist since 2004. His purpose is to help homeowners of all ages make the best decisions for their future, whether they are staying or going. Brian educates transitioning homeowners by way of personalized consultations, on-line videos, live webinars, in-person workshops and private events

Hello, Homeowners.

Congratulations! I know how difficult it was for you to decide whether to stay in your home or make a transition to a new home. I’ve seen first hand how paralyzing it can be and also how liberating it can feel when you finally make that tough choice.

Now it's time to get the biggest return on your largest investment. My goal is to give you clarity, certainty, and confidence while saving you time, money and frustration.

I'd like to show you how to:

- Downsize your belongings
- Get your home ready for the market
- Sell your home as-is
- Disclose everything to the buyers
- Select an attractive list price
- Calculate your adjusted cost basis
- Estimate your Capital Gains taxes
- Calculate your net return
- Retain your current property taxes
- Buy your next home before selling your current home
- Market your home to the world
- Choreograph your transitions
- Understand the contracts and how to spot red flags
- Negotiate the highest price
- Pick the best buyer
- Make a stress-free transition

Why Choose Brian as Your Listing Agent?



Longevity and Proven Track Record:

- Top producing “Senior-Centric” Realtor since 2004
- Seniors Real Estate Specialist (SRES)
- Certified Seniors Advisor (CSA)
- Certified Probate Real Estate Specialist (CPRES)
- Certified Negotiations Expert (CNE)
- Ranked top 5% of agents in the nation and top 5% Worldwide

Knowledge/Experience/Connections:

- Retirement Community Expert: Approved referral Agent
- Works closely with move managers and retirement communities
- Business contacts: Bridge loans, reverse mortgages, and HELOCs
- Knowledgeable in areas such as: taxes, trusts and real estate law
- Relocation connections: Areas, Realtors and Communities

Full-Service Realtor:

- Orchestrates the entire home preparation process.
- Covers the cost of all marketing
 - Photos, videos, ariels, floorplans, brochures, and more

Communication, Transparency and Repeatable Systems:

- Constant communication directly between Brian and homeowner
- Provides Listing Manual describing every step of the transaction with accompanying videos.
- 70-page operations manual and 200-item transaction checklist

Keller Williams Realty:

- Largest independent real estate franchise in the world
- Highest agent count, units sold and sales volume in the world
- Global reach with 940+ offices and 250,000+ agents worldwide

Dedicated Staff/Team:

- Licensed Listing Agent Assistant
- Licensed Buyer’s Agent (no double ending deals)
- Project Manager and Property Manager
- Real Estate Assistant
- Dedicated Transaction Coordinator



Meet the Team



Monnick "Nicky" de Guia *Assistant & Team Manager*

Nicky has more than 10 years of experience assisting in the field of customer service and technical support. She is keen to details, making sure to provide excellent outputs. She is one of the main points of contact throughout your transaction. She schedules the home preparation services, orchestrates the calendar and makes sure that your transaction is stress-free.



Candace Levers *Project Manager*

Candace has been a licensed Realtor since 2007. Candace is responsible for scheduling and interacting with the home preparation team to help you get the biggest return on your investment. In addition to home preparation, she is also our "feet on the street" and will take care of your home while it is on the market. Lastly, she can back up Brian in "Realtor-Mode".



Robert Musallam *Buyer's Agent*

Robert has been a licensed Realtor since 2014. Because Brian represents home sellers, it is a conflict of interest for him to write offers for unrepresented buyers. Robert can write offers on behalf of unrepresented buyers and assure that the lines of communication are always open and there are no surprises. Of course, all offers from all agents and brokers will be presented to the seller for their consideration.



Kristin Romano *Transaction Coordinator*

With years of Real Estate experience and thousands of closed escrows under her belt, Kristin is great at keeping everything on track! Not many people love doing paperwork, but Kristin does. As a transaction coordinator, she will keep timelines, paperwork, escrow, and agents organized and moving forward, with a smile.



Michelle Santiago *Escrow Officer*

Michelle has over 28 years of experience in escrow in Los Gatos. Her Background has a very strong history with resale, Trust, Probate, 1031 exchange, reverse exchange, refinance and commercial sales. Michelle and her highly experienced team are well known in the real estate industry as being very professional by her long list of loyal clients.

Website Introduction



REAL-ESTATES SERVICES

HOME QUOTE

Interested in finding your home's value and how much you would net from a sale? Request a Comparative Market Analysis

stayorgohomeowner.com/cma

HOME SELLING



On the Home Selling page, you will learn more about Brian Schwatka, his team and how they give their clients a world-class experience every time. You can also interview Brian "virtually", review Real Estate statistics and watch his watch educational videos .

stayorgohomeowner.com/sell

Our 3-Step process to help you make the best decisions for your future

STEP 1

SELF EVALUATION

Self Evaluation



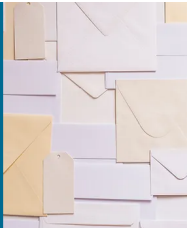
This exercise will give you a clear picture of where you stand today in your homeownership and show you what needs to be worked to obtain balance.

stayorgohomeowner.com/evaluate

STEP 2

POSTCARD FROM THE FUTURE

The postcard from the future



This exercise allows you to envision your perfect future so that you know where you are going. Live your best life!

stayorgohomeowner.com/postcard

STEP 3

HOMEOWNER ANALYSIS



Once you have completed both the self-evaluation and the postcard from the future exercises, it's time to get together with Brian for a Homeowner Analysis and put the pieces of your puzzle together.

stayorgohomeowner.com/consultation

EDUCATION

QUICK EDUCATIONAL VIDEOS

Our library of short Puzzle Piece videos will help you understand some of the most important topics to consider when selling.

www.stayorgohomeowner.com/puzzle



WEBINARS - WORKSHOPS - CONSULTATIONS

We educate transitioning homeowners by conducting free live webinars in conjunction with retirement communities. Now you can learn from the comfort of your own home.

Webinar Topics Include:

- Should I Stay or Go? - How to Decide
- Stay or Go Where?
- The Myths of Retirement Living Communities
- In-Home Care vs. Retirement Living Communities
- Breaking the Paralysis of Analysis
- Ready, Set, Go
- Real Estate "Flight Plan"

To learn more about our webinars, go to:

www.stayorgohomeowner.com/webinars

RESOURCES

RETIREMENT COMMUNITIES

Here we have a non biased retirement community directory covering 200+ communities in the 10 surrounding counties. There's nothing else like it.

www.stayorgohomeowner.com/communities

COMMUNITY MATCHER

Having trouble finding the right community? Fill out our Community Matcher Questionnaire and we will send you our suggested retirement communities based on your search criteria.

www.stayorgohomeowner.com/communitymatcher

RELOCATION SERVICES

This page has information about cities outside Silicon Valley that you may enjoy just as much..

www.stayorgohomeowner.com/relocation

RELOCATION MATCHER

Having trouble finding the right area? Fill out our Relocation Matcher Questionnaire and we will send you our suggested areas based on your search criteria.

www.stayorgohomeowner.com/relocator



The Area Specialist "Myth" and Brian's Portfolio

Many Realtors market themselves as your "Neighborhood/Area Specialist" in hopes that homeowners will see value in that. Homeowners should understand that they are hiring TWO Realtors when selling their homes:

- The **Listing Agent** is your **Marketing Department** and **represents the Seller (you)**
- The **Selling Agent** is your **Sales Department** and **represents the Buyers**

It is the Buyer's Agent who must be the "Area Specialist" because they are interacting with their buyers and educating them on statistics, prices, schools, return on investment, etc. This information is all readily available.

The Listing Agent does not need to know your exact neighborhood to get you top dollar. Brian Schwatka is a "**Silicon Valley Marketing Specialist**"



LOS GATOS



WILLOW GLEN



MORGAN HILL



SARATOGA



CAMPBELL



LOS ALTOS



ALMADEN



SILVERCREEK



SUNNYVALE



ROSE GARDEN



CUPERTINO



THE VILLAGES

Communication and Complete Transparency

Since you've decided to make a transition to a new home and since you don't sell houses everyday, I've created this proprietary step by step manual for you. This **Listing Manual** or "**Flight Plan**" spells out everything that will take place between the time you sign the listing agreement until the time that we close escrow and your funds are transferred. You will always know who is doing what at any given moment and you can use this as a reference document should you have any questions during our adventure together.

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Communication and Complete Transparency

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Pre-Listing Preparation

Selling a home can be a high-stress and time-consuming endeavor, if you chose the wrong agent. To get the best price for your home, the process includes knowing what cost-effective or no-cost improvements to make in order to get the best return, recommending and overseeing the right vendors, preparing the disclosures and other legal documents, effectively staging the home to get noticed and sold, correctly pricing the home to attract buyers, marketing the home, negotiating the offers, and smoothly going through escrow. No one person can master all of these tasks. You need a great team.

To ease your burden, Brian Schwatka orchestrates much of the work relating to home improvement, marketing, negotiation, and the escrow process. We have a team of specialists (i.e. interior designers, licensed contractors, handymen, graphic designers, copywriters, attorneys, online and social media marketing specialists) all devoted exclusively to assisting you through each step of the home-selling process.

It's unlikely that another agent, no matter how good, can match our depth of resources or combined expertise.



Pre-Listing Preparation

DESIGN COORDINATION

We will evaluate and recommend design improvements; for example, painting walls, interior touch-ups, removing carpeting, etc. Our team will ensure the improvements to your home are made beautifully, within budget, and on time. We will work directly with vendors to prepare your house, which includes scheduling start and end dates for the project, overseeing the work, and ensuring the work is appropriately performed.

VENDOR SELECTION AND MANAGEMENT

Due to our high volume of listings and long-standing relationships, we negotiate special pricing with local vendors. These vendors are familiar with the types of work necessary to bring a home to the market in the most cost-effective way. Our Project Manager can use our vetted vendors or your favorite vendors. Either way, you enjoy peace of mind knowing that the job is being handled professionally.



LISTING ACTION PLAN

Our Project Manager provides a multi-point pre-inspection checklist that focuses on issues ahead of the property inspections, so simple details can be addressed before the inspector arrives. Work involves taking care of last-minute items, such as replacing light bulbs, fixing stuck windows, strapping water heaters, and checking or installing mandated smoke and carbon monoxide detectors.

PROPERTY INSPECTION AND PREPARATION

We will oversee and manage all property inspections on your behalf. If the pre-sale inspections reveal potential issues, we will consult with you on the best course of action, all with the goal of ensuring you get top dollar for your property.

SELLER'S DISCLOSURES

There is only one way to sell a home "as-is" and that is done by disclosing the good, the bad and the ugly to the buyers before they place their offer. Brian will take the time to educate you on how to complete your seller's disclosures and keep you out of legal troubles in the future.

Your Custom Marketing Plan

WELL-RESEARCHED PRICING

Capturing the right price in any given market is one of the most critical elements in a successful real estate transaction. Correctly pricing your property means diligently studying the market to know what interested buyers are willing to pay and to price completely within that range. This is what will position your house to stand out against other listings.

CAPTIVATING STAGING

Staging is what creates a “wow” factor when a buyer walks through the door of your property. It’s what creates an emotional response and can often be an influence on whether or not an offer is made. From maximizing curb appeal to creating a clean and open interior, I will guide you on how to capture maximum buyer interest by highlighting the unique features of your house.

HIGH-QUALITY, PROFESSIONAL PHOTOGRAPHY

Crisp, clear photos will make your property pop online and maximize visual appeal. I work with highly qualified, professionally trained real estate photographers who specialize in making your house look it’s absolute best.

ENGAGING VIDEOGRAPHY

Video is at the heart of an effective digital marketing campaign and can provide a distinct advantage in a competitive market.

3D TOURS AND FLOORPLANS

3D Virtual Tours and floor plans allow potential buyers to view the property as though they are in the home itself. This allows greater access to out-of-town and international buyers in the market for a Silicon Valley home.

PROPERTY WEBSITE

Most of our listings receive a custom website featuring a gallery of photos, detailed property description, floor plan, 3D virtual tour, and personalized web URL. The web address is prominently displayed on all print and digital marketing materials so buyers can find it easily.



Your Custom Marketing Plan

BEST-IN-CLASS PRINT MARKETING

From fliers to postcards to custom lookbooks, we'll determine what professionally printed marketing pieces will move the needle to maximize the sale of your property.

LUXURY YARD SIGNAGE

Since many buyers find their next homes while driving around their desired neighborhoods, a yard sign is a great way to advertise. We will install a double legged, luxury yard sign with solar lighting which offers 24-hour visibility.

OPEN HOUSE STRATEGY

Whether or not an open house is where your buyer comes from, they serve a strategic purpose – aggregating interested buyers in a specific geographic area. By showcasing your property with an open house, or simply leveraging the leads generated at another nearby open house, we will create and target a highly -qualified, localized group of buyers.

LIST YOUR HOME ON THE MLS

The Multiple Listing Service or MLS allows your home to be seen on the internet all over the world. Most traffic happens in the first 5 days and especially in the first 1-3 days. Any Realtor or Buyer who has set up an automated search for homes like yours will see it within the first 15 minutes.

SELLER UPDATES DAILY

Constant communication reduces stress and removes the guesswork. You will receive daily updates so you know exactly what's going on:

- Exposure statistics (Internet traffic)
- Showing feedback (Buyer comments)
- Competition alerts (Listings in your area)



Staging and Virtual Staging

EDITING

- Enhancing and supplementing your current furnishings
- Home that are occupied

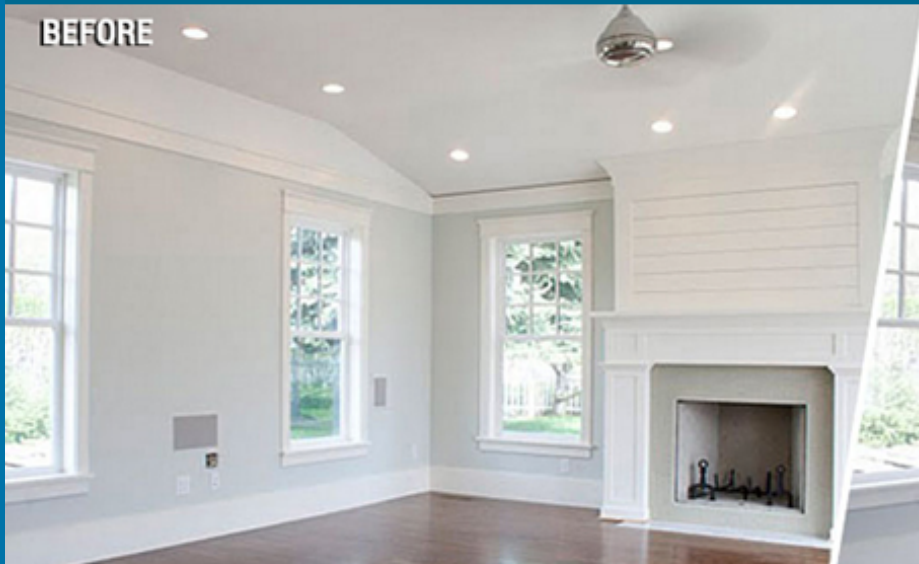
FULL STAGING

- Home that are vacant
- Living, dining, family, kitchen, baths, main bedrooms, yards

VIRTUAL STAGING

- Full staging or staging of unfurnished areas
- Homes that are either occupied or vacant

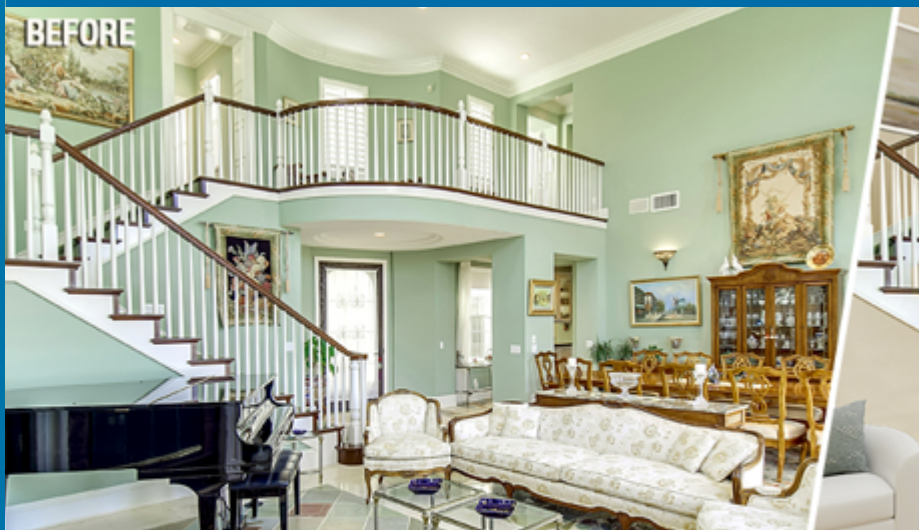
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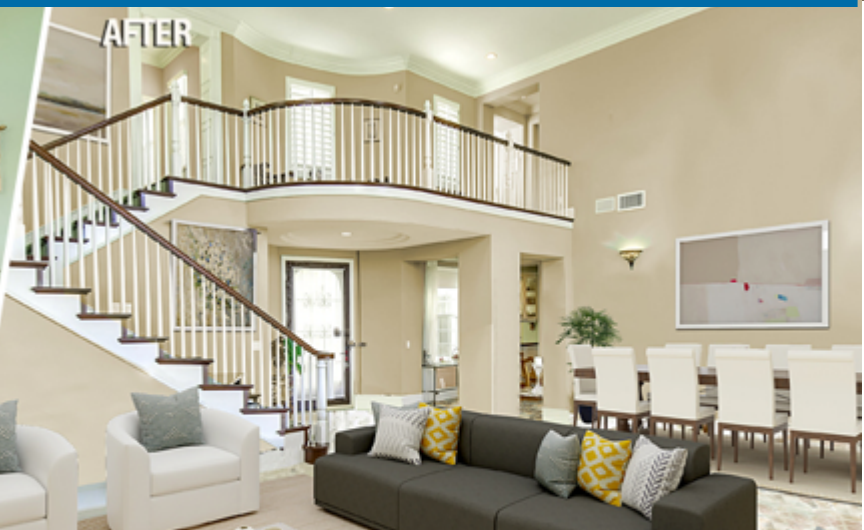
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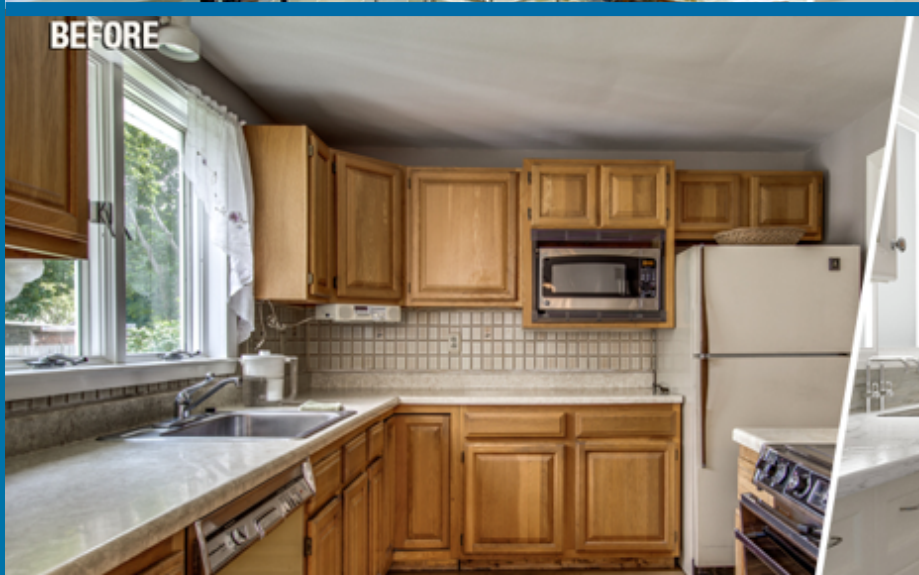
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AFTER



Pricing Strategy

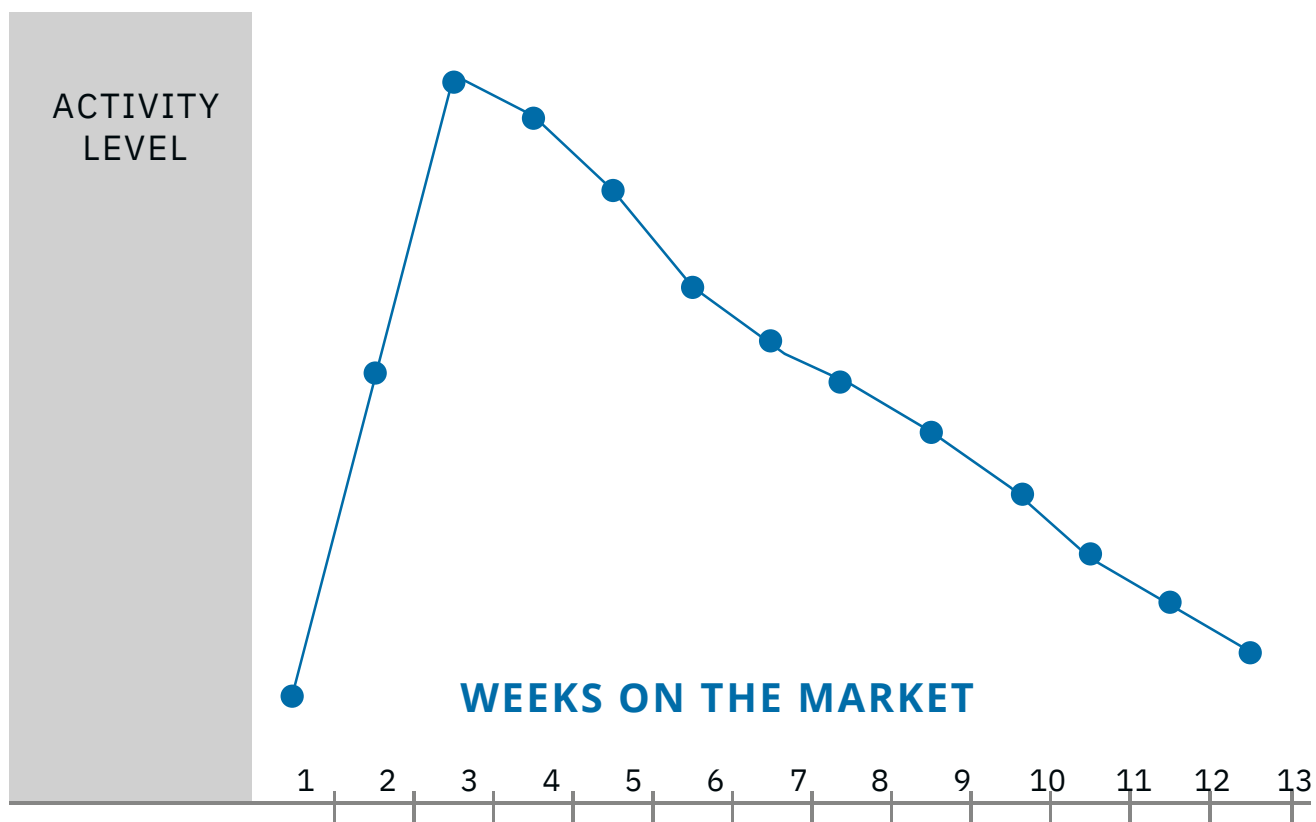
The right price for your property is not determined by any one agent or seller - it's determined by current market conditions.

Pricing strategy is an art, not a science. Experience matters! We assess accurate, up-to-date MLS data to select active, pending, and sold properties that are the most comparable in features and amenities to your property. Combined with our in-depth local knowledge of our marketplace, this method allows us to price your property correctly, so it sells timely and for the highest possible price.

The First 30 Days

CRITICAL TIMING

A property generates the most interest when it first hits the market. It is imperative to capture the attention of buyers and agents within the first month of listing.

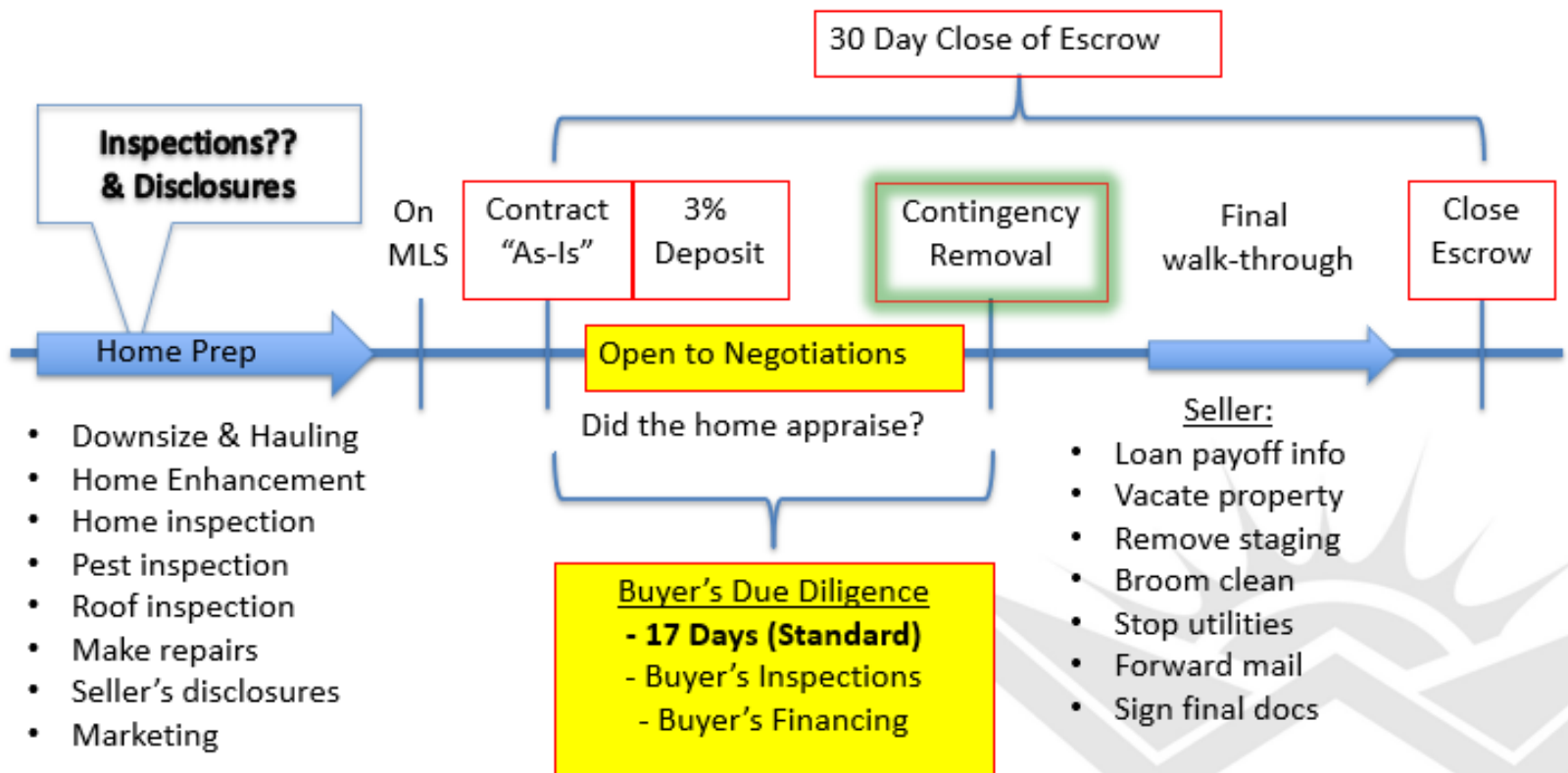


LOW ——— MEDIUM ——— HIGH

The Process

THE HOME SELLING PROCESS AND TIMELINE

- Initial meeting, walk-through, and
- Transition Planning
- Sign Listing Agreement
- Open escrow and order Preliminary Title Report
- Order Natural Hazards Disclosure Statement (NHDS)
- Downsize your belongings
- Prepare your property for sale: Inspections, repairs, seller's disclosures, staging, photos, etc.
- Establish a competitive price
- Launch marketing campaign
- Officially list your property
- Start showing your house and hold an open house (optional)
- Receive and present offers
- Negotiate contract to match the Transition Timeline
- Accept winning offer
- Work with title company and buyer's lender
- Oversee appraisal
- Negotiate any issues remove contingencies
- Coordinate packing and transition to new home or retirement community
- Buyer's Final walk-through
- Close and transfer funds



Should You Occupy or Vacate?

In this day and age, many homeowners do not want to occupy their homes while it's on the market. Unfortunately, homeowners usually need the funds from the sale of the home to purchase their next home or pay the entrance fee at the retirement community.

Moreover, when purchasing a new home or transitioning to a retirement community, your funds are expected by the receiving party on an "exact date".

Options for Sellers who want to vacate early

- Stay with family/friends for a couple of months during the sale
- Move to an extended stay hotel, vacation home or rental home
- Move to a month-to-month retirement community
- Sell an investment/rental property and use those funds
- Sell stocks (and pay capital gains taxes?)..
- Use a HELOC to pay for for a hotel or part of the entrance fee
- Obtain a personal loan for part or all of the entrance fee
- Secure a modified bridge loan and then pay it off after the sale
- Or any combination of the above



Think Ahead - Start Early!

How You Can Help

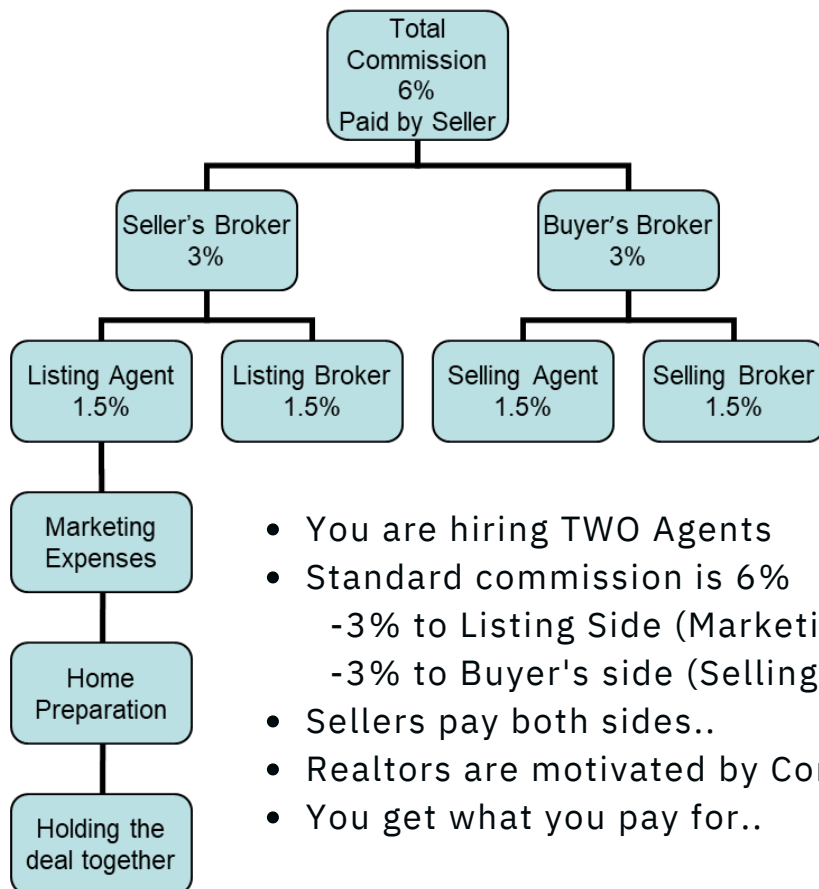
- Downsize and reduce clutter
- Depersonalize by putting away family photos
- Make 2 extra copies of the house keys
- Gather manuals and warranties for furnace, appliances, and items remaining with the house
- Prepare the crawlspace and attic access for the inspections
- Keep all city services going until the close of escrow
- Keep your mow and blow service going
- Think about pets and showing instructions
- Lock up your valuables, jewelry, medications, firearms, money, etc.
- Contact Brian if you have any questions, comments, concerns, or requests. I'm always here for you.



Let's talk about the elephant in the room..



Commissions..



Free Resources

Contact Brian Schwatka: <https://www.stayorgohomeowner.com/appointment>

Transition Specialist, Certified Seniors Advisor (CSA)

Keller Williams Bay Area Estates

Agent DRE# 01426785

Broker BRE# 01526679

16780-A Lark Ave.

Los Gatos, CA. 95032

Cell/Text: 408-499-9561

Email: brian@StayOrGoHomeowner.com

The Stay Or Go Homeowner **Website:** www.StayOrGoHomeowner.com

Brian's **Real Estate Webpage:** www.stayorgohomeowner.com/real-estate

Stay Or Go **Homeowner Analysis:** www.stayorgohomeowner.com/consultation

Request a **Free Home-Quote or CMA:** www.stayorgohomeowner.com/cma

Interview Brian "virtually": www.stayorgohomeowner.com/sell

Listing of **ALL Retirement Communities:** www.stayorgohomeowner.com/communities

Retirement Community Matcher: www.stayorgohomeowner.com/communitymatcher

Relocation Services: www.stayorgohomeowner.com/relocation

Relocation Matcher: www.stayorgohomeowner.com/relomatcher

FaceBook Page: www.facebook.com/StayOrGoHomeowner

YouTube Channel: www.youtube.com/@StayOrGoHomeowner



Why Keller Williams?

Keller Williams is not your traditional real estate company.

That is why it is not surprising that it is the fastest-growing real estate company in North America and is #1 globally. Our phenomenal growth is only part of the story:

- Largest independent real estate franchise
- A network of over 250,000+ real estate agents with a projected growth of 300,000
- 940+ offices worldwide
- Excellence in cutting-edge real estate training, real estate coaching and real estate education
- Most Innovative Real Estate Company – Inman News


GLOBAL REACH

Offering comprehensive services to investors, property owners, tenants, and developers around the world, Keller Williams Realty has an established network and a proven model that sets a framework for profitability in any market across the globe. We know that the strongest enterprises are driven by top talent, and our growth strategy is completely centered on getting in business with the very best people in the real estate industry across the globe.

With more than 180,000 real estate agents worldwide, operating in more than 940 market centers across the globe, Keller Williams is currently the largest real estate franchise by agent count in the world.



Realtor Interview Questionnaire

QUESTION		Agent 2	Agent 3
How long have you been a Realtor?	Since 2004		
Retirement Community Expert	✓		
Certified Seniors Advisor (CSA)	✓		
Estimates your capital gains taxes	✓		
Provides a step-by-step Listing Manual™	✓		
Provides step-by-step videos	✓		
Financial options for you to vacate early	✓		
Would NEVER represent the buyer	✓		
Dedicated Staff			
Home Preparation Manager	✓		
Licensed Listing Agent Assistant	✓		
Real Estate Assistant	✓		
Paperwork Manager	✓		
Marketing			
Covers the costs of ALL marketing: photos, videography, areal shots, floorplans, brochures, luxury signage, custom property website, social media marketing to the entire world	✓		

Testimonials



I would highly recommend Brian for your real estate and transition needs. I have known Brian for about 8 years. For me, as a Sales Director at a retirement community in Los Gatos, he has helped many of my clients both sell and relocate to my community. Brian is the ultimate professional, educates clients on their options, is never pushy, and get results in record time. He will definitely help take the stress off his clients in coordinating everything through the entire process. You can trust Brian to be honest in doing what's best for you with only your best interest at heart.

Brian has listed and sold 3 homes for me. He made the transactions low-stress, quick and with amazing results. He is extremely bright, knowledgeable, helpful, friendly and kind. I will be purchasing a home soon and he has already helped me with his knowledge of the market and his upbeat and encouraging guidance. He is the BEST. 10 stars!

For more reviews, go to www.stayorgohomeowner.com/sell

As the owner of a move management company, we have had the good fortune to work together with Brian for the last 10 years helping people with their downsizing and relocations. We have worked with many realtors, but have always been impressed with Brian's knowledge and understanding of the market to help educate and guide his clients through the process of selling a home. He is kind, compassionate and always has his clients best interests at heart. I refer clients to Brian knowing they will be well taken care of.

I met Brian several years ago when I took his class at the Campbell Community Center about selling a home and moving into a senior community. I thought at the time that he might be a good person to work with my parents when they were ready to move and I was right. ...

Testimonials



“Once again, Brian worked miracles for us. God knows that most realtors out there would not put as much work and detail into every transaction as Brian does. We never have to worry when Brian is involved. We let him know what our goal is and what our limitations are and he makes it happen. He truly is a great realtor and trusted friend!”

“Brian, thanks for your pro-active efforts in selling our home after it had expired on the MLS. After interviewing multiple Realtors, we came to the conclusion that you had the most complete marketing campaign and that you would work the hardest to sell our home as fast as possible. You did what you said you were going to do and sold our home, even in a terrible market. Thanks again.”

I have known Brian for over 25 years and he was my realtor on my two most recent transactions. Brian's excellent customer service, quick response, and knowledge of the market made him the clear choice when interviewing realtors to sell my last home and purchase my current home. His integrity and professionalism set him apart from the rest.

Brian Schwatka is a knowledgeable and helpful real estate professional. He is well prepared to answer the many questions which arise during the sale of a home, and is more than willing to step in and help guide the seller through the maze of paperwork that is involved. He is very responsive in helping to resolve unexpected issues that come up. It has been my pleasure to have had his assistance during this process.

For more reviews, go to www.stayorgohomeowner.com/sell

Thank You.



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