

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 Mira 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 • 1145 Mayette Avenue, San Jose • 978 Glenridge Drive, San Jose • 1968 Geneva Street, San Jose • 1661 Claremont Dr San Jose • 2547 Marchese Way, Santa Clara • 3119 Arcola Court, San Jose • 2267 Cottle Avenue, San Jose • 1255 Kimb

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TESTIMONIALS

Welcome



Hello, Homeowners,

"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.

Congratulations! I know how difficult it can be to decide whether to stay in your current home or make the transition to a new one. I've seen firsthand how paralyzing that decision can feel—and also how liberating it is once you've made it.

Now it's time to maximize the return on your biggest investment. My goal is to provide you with clarity, certainty, and confidence—while saving you time, money, and frustration.

Topics of Conversation:

- Your past/present homeownership
- Home improvements you've made
- Current home value
- Calculate your adjusted cost basis
- Cooperative Compensation
- Estimate your Capital Gains taxes
- Your vision of the perfect future
- Relocating out of the area
- Retirement Communities
 - How it all works
- Prioritizing your wants and needs
- Downsize your belongings
- Real Estate 101 (the timeline)
- Sell your home as-is

- Home preparations Best ROI
- Inspections and Disclosures
- Retain your current property taxes
- Sell (cash-out) Rent (cash-flow)
- Buy first or sell first
- Occupy or vacate while on the MLS
- Choreograph your transitions
- Market your home to the world
- Understand the contracts
 - Listing agreement
 - Purchase agreement
- 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 1% of agents in the nation and top 1% 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: Other 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

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 1100+ offices and 250,000+ agents worldwide

Communication, Transparency and Repeatable Systems:

- Constant communication directly between Brian and homeowner
- 70-page operations manual and 300+ item transaction checklist
- Provides Listing Manual describing every step of the transaction with accompanying videos.

Dedicated Staff/Team:

- Licensed Listing Agent Assistant (2 agents for the price of one)
- Project Manager for home preparations
- Pre-Inspector/Handyman
- Independent Buyer's Agent (no double ending deals)
- Transaction Manager
- Paperwork Manager



Meet the Team



Monnick "Nicky" de Guia Transaction Manager

Nicky brings over 10 years of experience in customer service and technical support. She is detail-oriented and committed to delivering excellent results. As one of your main points of contact throughout the transaction, Nicky coordinates home preparation services, manages the calendar, and ensures that every step of the process is smooth and stress-free.



Candace Levers Project Manager and Listing Assistant

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".



Dan Anderson Pre-Inspector and Handyman

Dan is the first on-site during the home preparation stage, conducting a full walk-through before the formal inspection is scheduled. He retired in 2018 after 34 years in law enforcement and later transformed his own home from a 3Bd/2Ba to a 6Bd/5Ba. With over 25 years of hands-on experience, Dan brings the same care and quality to your home as he does to his own. Dan is the man!



Michelle Santiago Escrow Officer

Michelle brings over 28 years of escrow experience in Los Gatos. Her background includes extensive work with resale, trust and probate transactions, 1031 and reverse exchanges, refinances, and commercial sales. Michelle and her highly experienced team are well respected in the real estate industry, known for their professionalism and trusted by a long list of loyal clients.

Communication and Complete Transparency

Since you've made the decision to transition to a new home—and because selling a home isn't something you do every day—I've created this proprietary step-by-step guide just for you. **This Listing Manual**, or "**Flight Plan**," outlines everything that will happen from the moment you sign the listing agreement to the day we close escrow and your funds are transferred. You'll always know who's doing what and when. Use this as a reference throughout our journey together to stay informed and confident every step of the way.

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Communication and Complete Transparency

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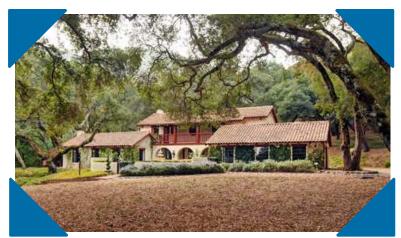
The Area Specialist "Myth" and Brian's Portfolio

Many Realtors market themselves as your "Neighborhood/Area Specialist" in hopes that homeowners will see value in that title. However, it's important to understand that there are TWO Realtors involved in a transaction—and that the Listing Agent should not interact with the buyers. Doing so creates a conflict of interest.

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

It's the **Buyer's Agen**t who truly needs to be the "Area Specialist", because they are the ones educating buyers on market statistics, pricing, schools, return on investment, and more. And today, this information is readily accessible.

The **Listing Agent** doesn't need to live in or know your exact neighborhood to get you top dollar. **Brian Schwatka is a "Silicon Valley Marketing Specialist."**



LOS GATOS



WILLOW GLEN



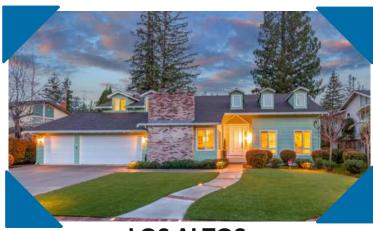
MORGAN HILL



SARATOGA



CAMPBELL



LOS ALTOS



ALMADEN



SILVERCREEK



SUNNYVALE



ROSE GARDEN



CUPERTINO



THE VILLAGES

Pre-Listing Preparation

Selling a home can be a high-stress, time-consuming endeavor—especially if you choose the wrong agent. To get the best price for your home, the process involves identifying the most cost-effective (or no-cost) improvements, selecting and managing the right vendors, preparing disclosures and legal documents, staging the home to stand out, pricing it strategically, marketing effectively, negotiating offers, and navigating escrow smoothly. No single person can master all of these tasks alone. You need a great team.

To ease your burden, Brian Schwatka oversees every phase of the process—from home improvements and marketing to negotiation and escrow. We've assembled a dedicated team of specialists—including interior designers, licensed contractors, handymen, graphic designers, copywriters, attorneys, and digital marketing experts—all focused on supporting you through every step of your home sale.

It's rare for any individual agent, no matter how talented, to match the depth of resources and combined expertise we bring to the table.



Pre-Listing Preparation

DESIGN COORDINATION

We will evaluate your home and recommend design improvements—such as painting walls, interior touch-ups, or removing carpeting—to enhance its appeal. Our team ensures that all upgrades are completed beautifully, within budget, and on schedule. We coordinate directly with trusted vendors, managing project timelines, overseeing the work, and making sure every detail is done to a high standard.

VENDOR SELECTION AND MANAGEMENT

Thanks to our high volume of listings and long-standing vendor relationships, we're able to negotiate special pricing with trusted local professionals. These vendors understand exactly what's needed to prepare a home for market in the most cost-effective way. Our Project Manager can work with our vetted vendors or coordinate with your preferred providers. Either way, you'll have peace of mind knowing the job is being handled professionally and efficiently.



LISTING ACTION PLAN

Our Project Manager, together with our preinspector/handyman, will provide a detailed multi-point pre-inspection checklist that identifies potential issues before the official property inspections. This proactive approach includes addressing common red-flag items such as replacing light bulbs, making basic repairs, strapping water heaters, and checking or installing required smoke and carbon monoxide detectors.

PROPERTY INSPECTION AND PREPARATION

We handle all property inspections on your behalf. If any issues arise during the pre-sale inspections, we'll review the findings with you and recommend the best course of action. Our goal is to help you sell your home "as-is" while still maximizing your return and achieving top dollar for your property.

SELLER'S DISCLOSURES

There's only one true way to sell a home "asis"—by fully disclosing the good, the bad, and the ugly *before* buyers submit their offers. Brian will guide you through the disclosure process step by step, using simple explanations and user-friendly online tools. This approach not only builds trust with buyers but also helps protect you from legal issues down the road.

Your Custom Marketing Plan

WELL-RESEARCHED PRICING (CMA)

Capturing the right price in any market is one of the most critical factors in a successful real estate transaction. Proper pricing requires careful analysis of market conditions to understand what buyers are willing to pay—and to price your home within that range. This strategic approach helps your home stand out among competing listings and attract serious interest.

CAPTIVATING STAGING

Staging is what creates the "wow" factor when a buyer walks through the door. It sparks an emotional response—and often plays a key role in whether or not an offer is made. From enhancing curb appeal to creating a clean, inviting interior, I'll guide you on how to showcase your home's unique features and capture maximum buyer interest.

HIGH-QUALITY, PROFESSIONAL PHOTOGRAPHY

Crisp, clear photos make your property stand out online and dramatically maximize its visual appeal to potential buyers. I work with highly qualified, professionally trained real estate photographers who specialize in expertly showcasing your home at its absolute best.

New Cutting Edge VIDEOGRAPHY

Video is at the heart of an effective marketing campaign, which is why we provide a stunning drone fly-through video tour of your home.

2D FLOORPLANS

2D floor plans give potential buyers the ability to visualize the layout as if they were inside the home. This added perspective is especially valuable for out-of-town and international buyers searching for a home in Silicon Valley.

PROPERTY WEBSITE

All of our listings receive a personalized website featuring a photo gallery, detailed property description, 2D floor plan, virtual tour, seller disclosures, and offer instructions. Your home's unique web address is included in all print and digital marketing materials, making it easy for buyers to find and explore.



Your Custom Marketing Plan

BEST-IN-CLASS PRINT MARKETING

From flyers and postcards to custom brochures, we'll determine which professionally printed marketing materials will make the greatest impact and help maximize the sale of your property. Each piece is thoughtfully designed to highlight your home's best features and attract serious buyers.

LUXURY YARD SIGNAGE

Since many buyers discover their next home simply by driving through their desired neighborhoods, a yard sign remains a powerful marketing tool. We install a double-legged, luxury yard sign with solar lighting, ensuring your property has 24-hour visibility and leaves a lasting impression—day or night.

OPEN HOUSE STRATEGY

Whether or not your buyer comes directly from an open house, these events serve a strategic purpose—gathering interested buyers within a specific geographic area. By showcasing your home through an open house, or by leveraging leads from nearby open houses, we create and target a highly qualified, localized pool of potential buyers.

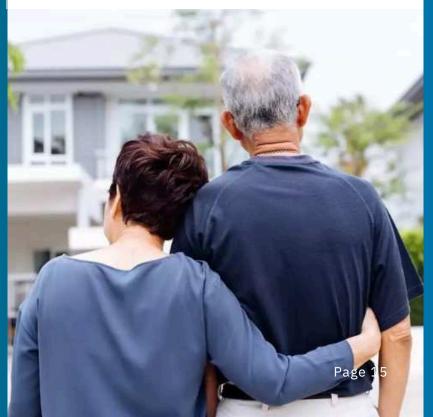
LIST YOUR HOME ON THE MLS

The Multiple Listing Service (MLS) gives your home global exposure by making it visible across hundreds of real estate websites. Most online traffic occurs within the first five days—especially in the first 1 to 3 days. Any Realtor or buyer with an automated search for homes like yours will typically see your listing within the first 15 minutes of it going live.

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







Pricing Strategy

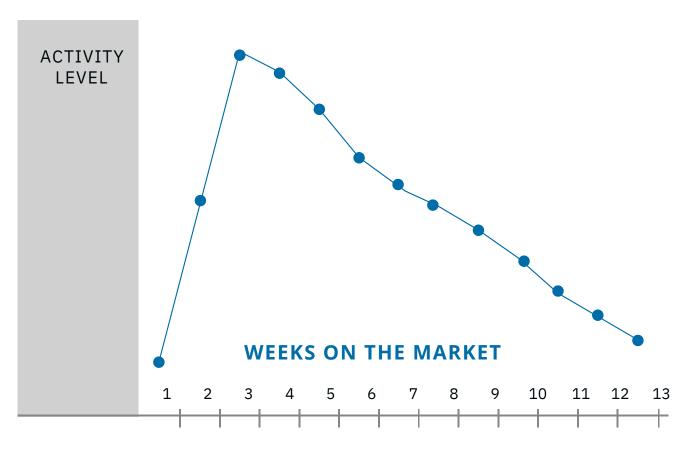
The right price for your property isn't determined by any one agent or seller—it's determined by current market conditions.

Pricing strategy is an art, not a science—and experience matters. We carefully analyze up-to-date MLS data to identify active, pending, and recently sold properties that closely match yours in features and amenities. Combined with our deep local market knowledge, this approach allows us to price your home accurately—so it sells efficiently and for the highest possible price.

The First 30 Days

CRITICAL TIMING

A property generates the most interest when it first hits the market. That's why it's crucial to capture the attention of buyers and agents within the first 30 days—when your listing is freshest and buyer urgency is highest.



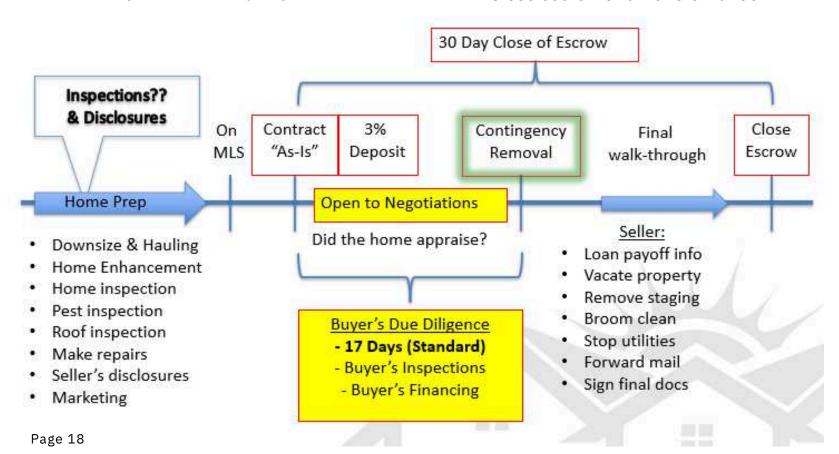


The Process

THE HOME SELLING PROCESS AND TIMELINE

- Initial Meeting, Walk-Through, and Transition Planning
- Sign Listing Agreement
- Open Escrow & Order Preliminary Title Report
- Order Natural Hazards Disclosure Statement
- Downsize Your Belongings
- Prepare Your Property for Sale
 - Inspections
 - Repairs
 - Seller's Disclosures
 - Staging
 - Photography
- Establish a Competitive Price
- Launch Marketing Campaign
- Officially List Your Property

- Start showing your home and hold an open house (optional)
- Receive and present offers
- Negotiate contract to align with your Transition Timeline
- · Accept the winning offer
- Work with the title company and the buyer's lender
- Oversee the appraisal
- Negotiate any issues and remove contingencies
- Coordinate packing and transition to your new home or retirement community
- Buyer's final walk-through
- Close escrow and transfer funds



Should You Occupy or Vacate?

In today's market, many homeowners prefer not to occupy their homes while they're listed for sale. However, most sellers need the proceeds from their current home to purchase their next home or pay the entrance fee for a retirement community.

Complicating matters, when buying a new home or transitioning to a retirement community, the receiving party typically expects your funds on an exact date—leaving little room for delays or uncertainty.

Options for Sellers who want to vacate early

- Stay with family or friends for a few months during the sale
- Move to an extended-stay hotel, vacation home, or rental property
- Relocate temporarily to a month-to-month retirement community
- Sell an investment or rental property to access available funds
- Sell stocks (keeping in mind potential capital gains taxes)
- Use a HELOC to cover hotel expenses or part of the entrance fee
- Obtain a personal loan to cover part or all of the entrance fee
- Secure a modified bridge loan, to be repaid after the sale
- Or use any combination of the above strategies



Think Ahead - Start Early!

How You Can Help

- Downsize and reduce clutter
- Depersonalize by putting away family photos
- Make two extra copies of your house keys
- Gather manuals and warranties for appliances, furnace, and items staying with the home
- Ensure crawlspace and attic access are clear for inspections
- Keep all city services active until escrow closes
- Continue regular yard maintenance (mow and blow service)
- Plan ahead for pets and showing instructions
- Secure valuables, jewelry, medications, firearms, and cash

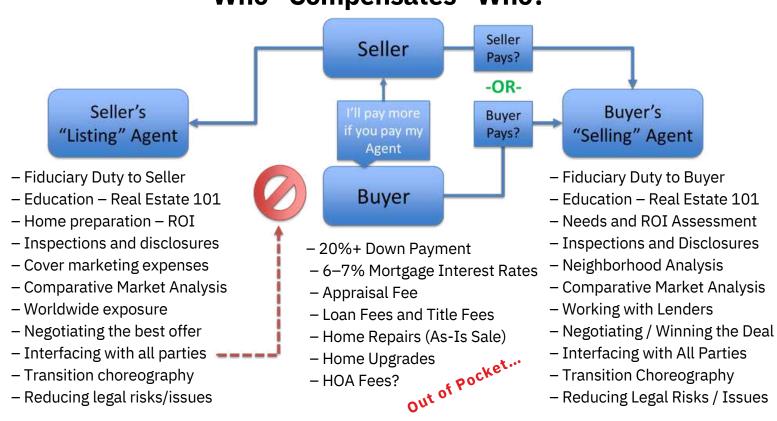
If you have any questions, comments, concerns, or requests—contact Brian. I'm always here for you.



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



Cooperative Compensation Who "Compensates" Who?



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: Staging, photos, videography, areal shots, floorplans, brochures, luxury signage, custom property website, social media marketing to the entire world			

Why Keller Williams?

Keller Williams is not your traditional real estate company.

That's why it's no surprise that this is the fastest-growing real estate company in North America—and ranked #1 globally. But our phenomenal growth is only part of the story:

- Largest independent real estate franchise
- A network of over 250,000 agents with projected growth to 300,000
- 1,100+ offices worldwide
- Excellence in cutting-edge training, coaching, and real estate education
- Named Most Innovative Real Estate Company by Inman News

GLOBAL REACH

Offering comprehensive services to investors, property owners, tenants, and developers worldwide, 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. This commitment to excellence ensures our clients receive unparalleled service and results, no matter where they are in the world.

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



Free Resources

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

Transition Specialist, Certified Seniors Advisor (CSA)

Keller Williams Bay Area Estates

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

Brian's Real Estate Webpage: <u>www.stayorgohomeowner.com/real-estate</u>

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

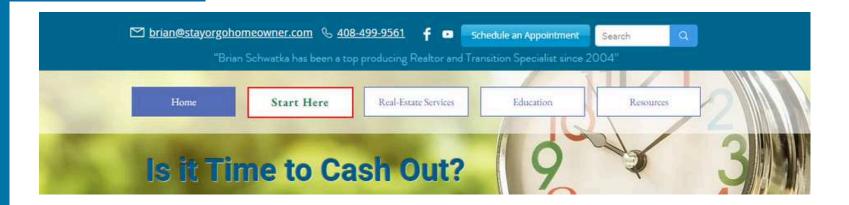
Relocation Matcher: <u>www.stayorgohomeowner.com/relomatcher</u>

FaceBook Page: www.facebook.com/StayOrGoHomeowner

YouTube Channel: www.youtube.com/@StayOrGoHomeowner



Website Introduction



Start Here

START HERE

5 steps to give you the CLARITY that you've been searching for:

ENVISION

Your Ideal Future

EDUCATE

Yourself & Seek Counsel

EXPLORE

Your "Where"
Options

Your Plans

stayorgohomeowner.com/start

EXECUTE

Real - Estate Services

HOME QUOTE

Interested in discovering your home's value and estimating your net proceeds from a sale? Request a Comparative Market Analysis (CMA) today!

stayorgohomeowner.com/cma

HOME BUYING

Let Brian Schwatka personally assist you in finding your ideal home—visit the Buyer's Consultation page to get started today.

stayorgohomeowner.com/buy

HOME SELLING

On the Home Selling page, you'll learn more about Brian Schwatka, his team, and how they deliver a world-class experience to their clients every time. You can also interview Brian virtually, review real estate statistics, and watch his educational videos.

stayorgohomeowner.com/sell

www.StayOrGoHomeowner.com

Education

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EDUCATION

QUICK EDUCATIONAL VIDEOS

Our library of short Puzzle Piece videos offers clear insights into some of the most important topics to consider when selling your home.

www.stayorgohomeowner.com/puzzle





WEBINARS - WORKSHOPS - CONSULTATIONS

Webinar Topics Include:

- Should I Stay or Should I Go? How to Decide
- Retirement Communities 101 (formerly The Myths of Retirement Living Communities)
- Breaking the Paralysis of Analysis
- How it All Works From Decision to Transition
- Your Real Estate "Flight Plan" The Stress-Free home selling process

To learn more about our webinars, go to:

www.stayorgohomeowner.com/webinars

Resources



RESOURCES

RETIREMENT COMMUNITIES

Here, you'll find an unbiased retirement community directory covering over 200 communities across the 10 surrounding counties—truly one of a kind.

www.stayorgohomeowner.com/communities

COMMUNITY MATCHER

Having trouble finding the right community? Fill out our Community Matcher Questionnaire, and we'll send you personalized retirement community recommendations based on your unique search criteria.

<u>www.stayorgohomeowner.com/</u> <u>communitymatcher</u>

RELOCATION SERVICES

This page features information about cities outside Silicon Valley that you might enjoy just as much.

www.stayorgohomeowner.com/relocation

RELOCATION MATCHER

Having trouble finding the right area?

Fill out our Relocation Matcher Questionnaire, and we'll send you personalized area recommendations based on your search criteria.

www.stayorgohomeowner.com/relomatcher

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

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. ...

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.

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."

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.

Thank You.





Brian Schwatka | REALTOR® | Transition Specialist | DRE# 01426785 408.499.9561 | Brian@StayOrGoHomeowner.com | StayOrGoHomeowner.com 16780 Lark Ave, Los Gatos, CA 95032