

BUYER PRESENTATION



COMPASS

Montgomery
& Lee Team

San Francisco

GUIDING YOU HOME

Buying a home is one of the most emotionally and financially significant decisions most people will make in their lifetime. Our duty is to represent you and your best interest. With our industry knowledge, exceptional tech tools, and national network, the entire home buying process will be simple and pain-free. Rest assured that you will be in dedicated, trustworthy hands as we guide you to your new dream home.

How we support you

- Provide real-time market insights on comparable homes with the Compass CMA tool (competitive market analysis)
- Curate a group of listings based on your preferences using Compass Collections
- Use our knowledge of on and off-market listings to find homes that meet your criteria
- Tour the area and share local expertise
- Build your 'buyer team' by connecting you with financing organizations and vendors
- Negotiate the best terms of sale to get your offer accepted



Proven Success

1,000

Lifetime
Transactions*

\$1B+

Lifetime Sales
Volume*

500+

Clients
Served*

MONTGOMERY + LEE TEAM SUCCESS IN SF

#1

#1 Team by Sales in
2022*

\$158M

Total Sales
Volume in 2022*

Top 1%

Market Share Based on
Closed Sales Volume*



NOTABLE TRANSACTIONS



1223 12th Avenue

Inner Sunset

4 BD 2 BA 2020 SF \$2,080,000



255 Topaz Way

Diamond Heights

4 BD 4 BA 2625 SF \$2,275,000



3324 Washington Street

Presidio Heights

3 BD 3 BA 2375 SF \$3,050,000



1842 18th Avenue

Inner Sunset

5 BD 5 BA 3578 SF \$3,450,000



127 Manchester Street

Bernal Heights

4 BD 4 BA 3405 SF \$4,275,000



210 Frederick Street

Haight Ashbury

5 BD 6 BA 3600 SF \$4,500,000

CLIENT TESTIMONIALS

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Todd and Marcus are elite real estate agents. Without hesitation, I recommend anyone work with them when buying or selling a home.

As seasoned veterans of the SF market, they took their time to understand what we wanted, what aspects of a home were exciting to us, what our concerns were, and answered every one of our questions completely. Based on conversations and home walk-throughs, they fine tuned our search to begin surfacing homes that fit our requirements. They even helped identify unique perks and concerning nuances of different homes we viewed, many of which we would have missed on our own. Todd and Marcus are incredibly thorough, well connected and bring a structured process to the table, removing much of the stress associated with the home-buying experience.

Once it came time to put in an offer, Todd and Marcus helped us craft the best possible offer, and kept us competitive without overstretching. We would not have found our ideal home without the steady insight and guidance from Todd and Marcus.

Sam G. | San Francisco

I recently decided to get back into home ownership and Todd and Marcus expertly navigated me through the process in this dynamic economic market in the Bay Area. Todd and Marcus took the time to sit down with me and discuss my objectives and expectations, including desired cities, neighborhoods, space needs, price, commute logistics, etc. I have to admit, I was a bit all over the place at the beginning, but thanks to Todd and Marcus' years of insight of buying / selling in the Bay Area, they were able to help me narrow my focus, as well as reset expectations to align with my objectives / needs. They always remain objective, giving you practical data to consider so you can make an informed decision on a significant purchase. Given their year's of experience, they were also able to give a high level assessment of repairs, renovations, issues, etc. with each property so you can get a sense of costs to expect after a purchase. What I really appreciate about Todd and Marcus is that they don't just try to push a sale to make a buck, but operates as consultants so that you make a decision that is right for you. Communication is also key and Todd and Marcus responded quickly and frequently to all my inquiries, in addition to checking in throughout the home buying process. Buying a home is a stressful and complicated process and having Todd and Marcus by your side make it extremely pleasurable. Highly recommended!

Irvin F. | San Francisco

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CLIENT TESTIMONIALS

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This was our third transaction with Todd and Marcus - and they were phenomenal in helping us navigate the search in such a tough market. They were highly organized in their search and property search to our needs, never rushed us a bit, did complete due diligence when we found the property and took us through the entire closing process with efficiency. Our trust & confidence in their effort to watch for our needs & interest made a massive difference. They were also available to go out of the way to introduce us to lenders, inspection agents etc. to ensure everything went seamless. Thank you Todd and Marcus! Highly recommend!

Sharad A. | San Francisco

As a first time buyer, I had countless questions relating to home purchasing processes, real estate valuation, financing and so much more. Todd and Marcus were incredibly patient in bringing me up to speed on these topics.

I found their communication style perfect for streamlining this process: they provided data wherever possible (CMA reports, market trends, neighborhood statistics) and was very clear about flagging other inputs as experience-based opinion (which I found incredibly valuable). Within a few weeks, I was able to develop confidence in my understanding of the real estate purchasing process.

Working with Todd and Marcus, I quickly developed two important skills:

1. (Somewhat of) an intuition for the real-estate market (pricing, buyer behavior, etc)
2. The patience to wait for the right opportunity. This was key for me. Early in our process, they worked with me to outline goals, price range, target neighborhoods, and develop a solid understanding of what it was I was looking for.

A few months and a handful of property viewings later, we had found the right one. Todd and Marcus expertly navigated me through the negotiation process -- exploring all options and enabling me to put forth the best offer possible without exceeding budget.

In our game everybody won, and the process was both fun and exciting.

Haleigh V. | San Francisco

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COMPASS EXCLUSIVE TOOLS AT MY FINGERTIPS

In the world of real estate today, it's not enough to simply keep up with the latest technology — you deserve an agent who's always one step ahead. At Compass, I have access to AI-driven technology to deliver a modern buyer experience that is collaborative, seamless, and hassle-free.

Private Exclusives

A private exclusive listing is an off-market home that can be shared by a Compass agent directly with their colleagues and their buyers. As your agent I can provide visibility into these listings.



Compass Collections

With Compass Collections I can curate a group of listings based on your personal preferences in a visual workspace. There, you can compare multiple properties, monitor market activity in real time, stay in constant contact with me, and invite collaborators to join in on the discussion - all in one central place.

Compass CMA

Powered by AI, Compass CMA is a tool that lets me provide you with real-time market insights on comparable homes in the area. Now you can feel more confident that your next home is in the right price range and that you are making a competitive offer.

Compass Search

Compass Search lets you sort by a wide range of features and amenities to pinpoint the perfect home. Plus, you can discover exclusive Compass listings that you cannot find anywhere else and receive real-time notifications of new homes with customized Saved Searches.

GET AHEAD WITH THE COMPASS ADVANTAGE

Investing Billions in Tech to Find Your Next Home

You deserve an agent who has the world's best real estate technology keeping them one step ahead. That's why I chose Compass, a forward-thinking brokerage where the technology of the future is changing outcomes today. Not only has Compass invested almost \$1.5B dollars in tech over a 10-year period¹, but we continue to spend more than \$100M annually on research and development² to help our agents make buying easier for you.

A 28K+ Network of Top Agents Nationwide

Buying successfully isn't just about what you know, but who you know. When it comes to your next home purchase, Compass has a strong, connected network. In 2023, 11% of Compass transactions resulted directly from referrals to Compass³, demonstrating the ability of our agents to help clients navigate markets everywhere at the highest standards. Not only do I have direct access to the country's top properties and the agents who represent them, but I'm keenly attuned to the nuances that make each market so special.



#1

Ranked Brokerage
in the U.S.¹

\$230B

2022 Gross
Transaction Value²

28K+

Top real estate agents
across the country

¹ #1 2022 closed sales volume. T. Velt, "eXp Realty, Compass earn No. 1 spots in RealTrends 500 brokerage rankings." RealTrends, Online, HW Media, 3/09/2023, <https://www.realtrends.com/articles/realtrends-500-exp-realty-jumps-to-no-1-sides-compass-no-1-volume/>.

² Gross Transaction Value is the sum of all closing sale prices for homes transacted by agents on the Compass platform. We include the value of a single transaction twice when our agents serve both the home buyer and home seller in the transaction. This metric excludes rental transactions.

THE HOME BUYING PROCESS AT A GLANCE

01

Buyer
Consultation

02

Sign Buyer
Representation
Agreement

03

Get Pre-
Approved

04

Find
Properties That
Fit Your Criteria

05

Submit and
Negotiate
Offer

Prepare for Purchase

06

Sign
Contract

07

Home Inspection,
Disclosures, Reports,
and Repairs

08

Loan
Application and
Appraisal

09

Closing &
Welcome
Home!

Contract to Close

STEPS TO HOMEOWNERSHIP

01

Buyer Consultation

First, we will connect for an initial consultation to discuss what you are looking for in your next home so I can help guide your search.

02

Buyer Representation Agreement

We will establish a mutual business agreement. This document is designed to increase transparency by laying out my obligations to you, in addition to details on term length, compensation, termination, exclusivity, representation, and property criteria. Once we are both aligned with the terms of the agreement, you will be asked to sign before I can show you or send you any properties.



03

Get Pre-Approved

If you are obtaining financing, getting a pre-approval letter from a lender before submitting an offer is important because it shows you are more likely to meet the proposed settlement date. A pre-approval letter and a good faith estimate from a lender will also give you insight into the projected down payment, closing costs, and expected monthly payment.

STEPS TO HOMEOWNERSHIP

04

Find Properties That Meet Your Criteria

Using the Compass CMA tool, I will run market analyses on comparable properties in the area to give you a clear understanding of current market value. Together, we will identify your ideal home's location and amenities, and attend open houses in a range of areas. I will listen to your continued feedback and activate a 'collection,' or specialized search for properties as they hit the market until we find a home you love.

05

Submit and Negotiate Offer

Once we find the right home, we will collaborate on a competitive offer. The offer is an agreement to pay a certain price for the home if accepted and may include other terms, such as whether you are waiving any contingencies or in how many days you are willing to close. It is my job to guide you through the decision-making process to ensure you are confident with our offer.



06

Sign Contract

Your contract is the agreement between you and the seller to purchase the property for a specific price. Also defined in the contract of sale is the settlement company, date of settlement, and earnest money deposit amount.

If required, an Escrow Deposit is the amount of money that the buyer will put in an escrow in good faith to demonstrate to the Seller that they are serious about purchasing the property. The money will only be deposited if the contract is signed and agreed by both parties.

STEPS TO HOMEOWNERSHIP

07

Home Inspection, Disclosures, Reports, and Repairs

It is my responsibility to coordinate all desired home inspections within the agreed timeline and contractual contingencies. We will also review and discuss the disclosures and preliminary title report. You may approve or negotiate credits and/or repairs. Prior to closing, remember to schedule a final walk-through of the property to verify property is still in acceptable condition and any negotiated repairs were done.

08

Loan Application and Appraisal

If you are obtaining financing, your lender will let you know the list of financial documents necessary to provide to the lender, including a couple months of bank statements, tax records, pay stubs etc. Typically, you will have a mortgage contingency of the agreed upon length to obtain a mortgage commitment. Once your lender has all of your documents, they will review them and issue a Clear-to-Close, which means your loan is complete and the file will be sent to the title company for closing. Your lender will have an appraisal done on the property.



09

Closing

Congratulations! You are now a homeowner. Welcome home!



OriginPoint

A Mortgage Made for You

Today's market is changing quickly. In order to get the best possible rate and total peace of mind, buyers are relying on OriginPoint. OriginPoint directly connects me with the top loan officers in the industry, which means you will have a cohesive team driving transparency and efficiency throughout every step of the mortgage process. The result? A seamless, stress-free home-buying experience for everyone involved.

Personalized solutions make all the difference.

With OriginPoint, buyers have a dedicated mortgage advisor that is always available through the entire transaction and beyond. They have answers to their questions before they even ask, and solutions that are totally customized for them.

What does the best possible rate look like?

It all depends on your personal needs and goals. In today's market, mortgage rates are fluctuating at a record pace, which means buyers need one-on-one expert guidance more than ever. Your OriginPoint mortgage advisor will provide deep insights into the market and their implications on your unique home purchase.

Let's get started

Getting a mortgage is just the beginning of the home buying journey, but it's something you want to get right. Reach out to me today to learn more about getting started with OriginPoint.

WE LOOK FORWARD TO WORKING WITH YOU

We go above and beyond to support our clients search for their perfect home, providing guidance and advice through every step of the process to make it seamless and hassle-free. Together, we will collaborate to find a home that meets your needs, your budget, and your lifestyle - so that you can confidently make your dream home yours when you find it.



Todd Montgomery

DRE#:01875716

REALTOR®

M: 415.203.6022

todd.montgomery@compass.com

Marcus Lee

DRE #: 01354869

REALTOR®

M: 415.999.2022

marcus.lee@compass.com