



**Phone: 561-469-2759**

**Text: 561-602-2323**

**Email: [chadhanna@reacheestateproperties.com](mailto:chadhanna@reacheestateproperties.com)**

**Website: <https://www.reacheestateteam.com/>**



Yearly Realtor Touch Plan-Sample

Month 1

1. Welcome Email
2. Phone Call Introduction
3. Direct Mail: Market Update
4. SMS: Follow-up on Welcome and Market Update

Month 2

5. Email: Home Buying/Selling Tips
6. Phone Call: Checking In
7. SMS: Reminder of Availability for Questions/Help
8. Monthly Newsletter via Email

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Month 3

9. Market Update Email

10. SMS: Highlight from Market Update

11. Phone Call: Discuss Market Update

12. Direct Mail: Local Community Events

Month 4

13. Email: Home Maintenance Tips for Spring

14. Phone Call: Checking In

15. Personal Meeting/Coffee: Relationship Building

16. SMS: Follow-up on Meeting

Month 5

17. Monthly Newsletter via Email

18. Phone Call: Discuss Newsletter Highlights

19. SMS: Event Invitation Reminder

20. Attend a Local Event Together

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Month 6

21. Market Update Email

22. Phone Call: Checking In

23. SMS: Personal Note/Check-in

24. Direct Mail: Half-Year Review/Thank You Note

Month 7

25. Email: Home Maintenance Tips for Summer

26. Phone Call: Checking In

27. SMS: Home Maintenance Reminder

28. Personal Meeting/Lunch: Relationship Building

Month 8

29. Monthly Newsletter via Email

30. Phone Call: Discuss Newsletter Highlights

31. SMS: Market Update Reminder

32. Direct Mail: Invitation to a Client Appreciation Event

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Month 9

33. Client Appreciation Event
34. Email: Follow-up on Event
35. Phone Call: Post-Event Check-In

Month 10

36. Monthly Newsletter via Email
37. Phone Call: Checking In
38. SMS: Reminder of Availability for Questions/Help

Month 11

39. Email: Home Maintenance Tips for Winter
40. Phone Call: Checking In
41. Personal Meeting/Coffee: Relationship Building
42. SMS: Follow-up on Meeting

Month 12

43. Monthly Newsletter via Email
44. Phone Call: End of Year Check-In
45. SMS: Happy New Year Greeting
46. Direct Mail: Year-End Review and New Year Wishes

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