

MARKETING CAMPAIGN

2024 CLIENT TAX RECONNECTION

Letter/Email: “2024 Client Tax Reconnection ”

Reconnect with past clients by providing their final settlement statements for tax purposes. This campaign strengthens your relationship with clients while subtly encouraging referrals and highlighting your ongoing commitment to exceptional service.

Objective: Reconnect with past clients by providing their final settlement statements for tax purposes

Method: Emailing or mailing past clients with their final settlement statements.

Follow-ups: Letter/email, email/phone call, text message, social media DM or friendly check-in

Summary and Timeline for Campaign Execution

Week	Action	Details
Late Jan - Feb	Send Initial Email or Letter	Provide closing statement with personal touch.
Week 1	Follow-Up Email or Phone Call	Confirm receipt and offer assistance.
Week 2	Follow-Up Text Message	Check in casually and provide another touchpoint.
Week 3	Social Media DM or Friendly Check-In	Maintain connection and offer ongoing support.

Initial Engagement: Email or Letter with Settlement Statement

Timing: Late January – Early February

Email Template (For Buyers)

Subject Line: Your 2024 Home Purchase Closing Statement – {{Agent_First_Name}}, Your Trusted Real Estate Advisor

Body:

Hi {{Buyer_First_Name}},

I hope you're enjoying your new home at {{Property_Address}}! As part of my commitment to serving my valued clients, I'm sharing your final settlement statement for your 2024 home purchase.

This document is essential for your records and will be useful for tax preparation. I've attached it here for your convenience.

If you have any questions or need assistance with anything—whether it's about your home, service provider recommendations, or just general advice—I'm always just a call or email away.

It was truly a pleasure to work with you and help you achieve such an important milestone. If you know anyone looking to buy or sell in 2025, I'd be honored to provide them the same exceptional service you experienced.

Wishing you all the best in your home and beyond. Let's stay in touch!

{{Agent_First_Name}} {{Agent_Last_Name}}

{{Agent_Phone}} | {{Agent_Email}}

{{Agent_Website}}

Attachment: Final Settlement Statement for {{Property_Address}}

Letter Template (For Buyers)

Dear {{Buyer_First_Name}},

I hope you're settling into your new home at {{Property_Address}}! I wanted to provide you with a copy of your final settlement statement for your 2024 home purchase.

This document is essential for your records and will be useful for tax preparation. I've enclosed it for your convenience. If you have any questions or need clarification, I'm always here to help.

Working with you was such a pleasure, and I truly value the trust you placed in me during this important time in your life. If you know of anyone considering buying or selling a home in 2025, I'd greatly appreciate it if you shared my name with them.

Thank you again for choosing me as your real estate advisor. I look forward to staying in touch and continuing to be a resource for you!

Best regards,

[Your Name]

[Your Title]

[Your Phone Number]

[Your Email Address]

[Your Website]

Enclosure: Final Settlement Statement for {{Property_Address}}

Email Template (For Sellers)

Subject Line: Your 2024 Home Sale Closing Statement – {{Agent_First_Name}}, Your Trusted Real Estate Advisor

Body:

Hi {{Seller_First_Name}},

I hope you're settling comfortably into your next chapter after selling your property at {{Property_Address}}!

As part of my ongoing commitment to serving my clients, I'm providing you with a copy of your final settlement statement for the sale of your property. This document is important for your records, particularly for tax preparation, and I've attached it here for your convenience.

If you have any questions about this statement, your property sale, or the current real estate market, don't hesitate to reach out—I'm always here to help!

It was truly an honor to guide you through the selling process, and I'm grateful for the trust you placed in me during this important time. If you know anyone considering buying or selling a home in 2025, I'd be delighted to provide them with the same exceptional service. Referrals from wonderful clients like you mean the world to me!

Thank you again for the opportunity to work with you, and I look forward to staying in touch.
Wishing you all the best!

Warm regards,

{{Agent_First_Name}} {{Agent_Last_Name}}

{{Agent_Phone}} | {{Agent_Email}}

{{Agent_Website}}

Attachment: Final Settlement Statement for {{Property_Address}}

Letter Template (For Sellers)

[Your Name/Logo]

[Your Address]

[Your Phone Number]

[Date]

Dear {{Seller_First_Name}},

I hope you're settling comfortably into your next chapter after selling your property at {{Property_Address}}!

I wanted to provide you with a copy of your final settlement statement for the sale of your property. This document is essential for your records and especially helpful during tax season, so I've enclosed it for your convenience.

If you have any questions about the statement, the sale, or even the current real estate market, please don't hesitate to reach out. I'm always here to assist you with anything you might need.

Working with you was such a privilege, and I'm incredibly grateful for the trust you placed in me throughout the selling process. If you know anyone considering buying or selling a home in 2025, I'd greatly appreciate it if you'd share my name with them. Referrals from amazing clients like you are the heart of my business!

Thank you again for choosing me as your real estate advisor. I look forward to staying in touch and continuing to be a resource for you.

Best regards,

[Your Name]

[Your Title]

[Your Phone Number]

[Your Email Address]

[Your Website]

Enclosure: Final Settlement Statement for {{Property_Address}}

Follow-Up #1: Email or Phone Call Confirmation

Timing: 1 week after sending the initial email or letter

Email Script:

Subject Line: Just Checking In – Did You Receive Your Closing Statement?

Hi {{Client}},

I just wanted to follow up and make sure you received the closing statement I sent over for {{Property_Address}}. It's an important document for your tax preparation, and I want to be sure you have everything you need.

If you have any questions or need assistance with anything, please don't hesitate to reach out. I'm here to help!

Looking forward to staying in touch. Let me know how I can assist you.

Warm regards,

{{Agent_First_Name}}

Phone Call Script:

Hi {{Client}}, this is {{Agent_First_Name}}. I'm just checking in to make sure you received the closing statement I sent over for your {{home purchase/property sale}} at {{Property_Address}}. I wanted to make sure you have it handy for tax season—it's a document you'll definitely want to keep.

Buyers- How's everything going with the house? Are you enjoying the neighborhood?

Sellers- How are things going since the sale? Are you settling into your next chapter

comfortably?

If you have any questions about the statement or anything else, I'm always here as a resource for you.

Follow-Up #2: Text Message

Timing: 2 weeks after sending the initial email or letter (If no response to previous follow ups)

Message (For Buyers):

Hi {{Buyer_First_Name}}, it's {{Agent_First_Name}}! Just checking in to make sure you received your closing statement for {{Property_Address}} that I sent over recently. Let me know if you have any questions about it!

I hope everything is going well with your home. If there's ever anything I can assist you with, I'm just a text or call away! 😊

Message (For Sellers):

Hi {{Seller_First_Name}}, it's {{Agent_First_Name}}! Just checking in to make sure you received your closing statement for the sale of your property at {{Property_Address}}. Let me know if you have any questions or need clarification—I'm happy to help!

How's everything going in your new chapter? If you ever need anything, feel free to reach out. 😊

Follow-Up #3: Social Media Post

Timing: 3 weeks after sending the initial email or letter

Social Media Post Caption

🏡 A friendly reminder for my amazing clients from 2024! 🏡

Whether you bought your dream home or sold a beloved property last year, your closing statement is an important document to keep handy—especially with tax season approaching.

You should have already received your closing statement from me **via email or mail**, but if you haven't seen it or need another copy, please don't hesitate to reach out—I'm here to help!

It was such an honor to guide you through your real estate journey in 2024. If you or someone you know is looking to buy or sell in 2025, I'd love the opportunity to assist them with the same care and dedication. Referrals from incredible clients like you mean the world to me!

✉️ Send me a message or give me a call if there's anything I can do for you.

#RealEstate #BuyerTips #SellerTips #ClosingStatement #TaxSeasonReady #RealtorLife
#ClientLove