



Buyer Referral Checklist

Tibbetts Insurance Services | Louisiana Homeownership Resource Center

Use this checklist before sending a buyer to Tibbetts Insurance to make sure every referral is smooth, complete, and closes on time.

BUYER INFORMATION

- ☐ Full Name
- ☐ Best Phone Number
- ☐ Email Address

PROPERTY INFORMATION

- ☐ Property Address
- ☐ Purchase Price
- ☐ Estimated Closing Date
- ☐ Primary Residence or Investment Property

MORTGAGE INFORMATION

- ☐ Lender Name
- ☐ Loan Officer Name
- ☐ Loan Officer Contact Information

HELPFUL PROPERTY DETAILS (IF AVAILABLE)

- ☐ Roof Age
- ☐ Recent Major Updates
- ☐ Prior Claims Information (if known)
- ☐ Flood Zone Information (if known)



Buyer Referral Checklist

Tibbetts Insurance Services

REFERRAL INTRODUCTION

Introduce Buyer to Tibbetts via group text or email. Example:

"Hi Sarah, I'd like to introduce you to Matt at Tibbetts Insurance Services. Sarah is purchasing a home in Baton Rouge and is looking for homeowners insurance options. Matt, Sarah's closing is scheduled for July 15. I'll let you two connect from here."

WHAT HAPPENS NEXT?

- ☒ Buyer contacted promptly
- ☒ Insurance options reviewed
- ☒ Questions answered
- ☒ Lender requirements coordinated
- ☒ Updates provided throughout the process
- ☒ Closing documents delivered on time

Ready to send a referral?

Visit partners.tibbettsinsurance.co or call us directly.

tibbetts.ins@gmail.com · (225) 273-1165

12057 Old Hammond Highway, Baton Rouge, LA 70816-0603