



Your First Safety Step: Meeting a New Client

How, when and where you meet a client for the first time is a crucial turning point in ensuring your personal safety. For example, you should never, ever meet someone for the first time at a property – this leaves you vulnerable. Instead, take these 10 easy steps to help empower you:

1. Make sure you are not alone in the office when meeting someone. If you are alone, call a friend or colleague before the client is due to arrive and ask them to call and check on you 15 minutes into the visit. Then call them back when the person has left your office.
2. Ask every prospect or new client to stop by your office to complete a Prospect Identification Form (an example of this form is online at www.REALTOR.org/Safety), preferably in the presence of an associate.
3. Use a registration book for all clients and other visitors. Be careful to make sure that everyone signs in.
4. Introduce the prospect to someone in your office. A would-be assailant does not like to be noticed or receive exposure, knowing a person could pick him/her out of a police lineup.
5. Get the client's car make and license number. Check this information yourself – don't just take their word for it. You can do this discreetly by watching them drive up, glancing out at their car, or checking it when you leave the office.
6. Photocopy their driver's license and retain this information at your office. Explain that this will be shredded when it is no longer needed. Legitimate clients do not mind you copying their driver's license. We freely show our license to the clerk at the grocery store when we write a check and we show our ID to rent a movie.
7. Call references and verify their employment and current address, and retain this information at your office.
8. Check county property records to confirm the ownership of a property before you go to a listing appointment or approach a for-sale-by-owner listing. The more information you have, the easier and faster it is for police to catch a perpetrator if you become a victim.
9. Always let someone know where you are going; leave the name and phone number of the client you are meeting.
10. When talking to any client or prospect, be careful not to share any personal information – specifically, details on where you live or information that can allow the person to pinpoint your home.