

<b>Reference No.</b>																	
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## SELF-ASSESSMENT GUIDE

Qualification Title:	<b>REAL ESTATE SERVICES NC II</b>		
Units of Competency Covered	<ul style="list-style-type: none"> <li>• <b>Perform Sales/Marketing Function</b></li> <li>• <b>Perform Sales Documentation Function</b></li> <li>• <b>Perform Loan Processing Function</b></li> <li>• <b>Perform Basic Property/Management Function</b></li> </ul>		
Instruction: Read each question and check the appropriate box to indicate your answer.			
<b>Can I?</b>	<b>YES</b>	<b>NO</b>	
<b>Perform Sales/Marketing Function</b>			
<ul style="list-style-type: none"> <li>• Participate in project orientation and accreditation*               <ul style="list-style-type: none"> <li>- Determine and apply legal laws and regulations for documentation procedures</li> <li>- Determine and apply documents process and procedures</li> </ul> </li> </ul>			
<ul style="list-style-type: none"> <li>• Conduct prospecting activities (saturation activities)*               <ul style="list-style-type: none"> <li>- Organize schedules of prospecting/saturation activities (manning, tripping)</li> </ul> </li> </ul>			
<ul style="list-style-type: none"> <li>• Prepare marketing tools*               <ul style="list-style-type: none"> <li>- Prepare/Utilize presentation/personalized materials/tools for the kind of prospect</li> </ul> </li> </ul>			
<ul style="list-style-type: none"> <li>• Qualify the buyers' financial capability, authority and need* (based on buyers checklist requirements, interest to purchase the property and capability to pay)</li> </ul>			
<ul style="list-style-type: none"> <li>• Conduct tripping/ocular or site inspection*               <ul style="list-style-type: none"> <li>- Determine property details, availability chart inventory and tripping schedules/arrangements</li> </ul> </li> </ul>			
<ul style="list-style-type: none"> <li>• Facilitate transaction deal*               <ul style="list-style-type: none"> <li>- Evaluate requirements submitted</li> </ul> </li> </ul>			
<ul style="list-style-type: none"> <li>• Perform after sales service*               <ul style="list-style-type: none"> <li>- Ensure completeness of necessary documents in accordance to standard procedure/guidelines</li> <li>- Provide computation for fees/charges and appropriate taxes in accordance with the existing standards</li> </ul> </li> </ul>			
<b>Perform Sales Documentation Function</b>			
<ul style="list-style-type: none"> <li>• Organize data sourced from prospecting activity*</li> </ul>			
<ul style="list-style-type: none"> <li>• Sort the prospects in accordance with client's needs and financial capability*</li> </ul>			
<ul style="list-style-type: none"> <li>• Book sale documentation*               <ul style="list-style-type: none"> <li>- Determine and meet required documents in accordance with the mode of payment and established standards</li> </ul> </li> </ul>			

<ul style="list-style-type: none"> <li>• Assist buyers regarding chosen financing options* <ul style="list-style-type: none"> <li>- Collect checklist of requirements</li> <li>- Determine/Evaluate buyer's capacity to purchase the property</li> <li>- Facilitate collection/submission of signed requirements to financial institutions</li> </ul> </li> </ul>		
<ul style="list-style-type: none"> <li>• Collect loan requirements* <ul style="list-style-type: none"> <li>- Facilitate coordination, collection and submission of borrower's requirements in accordance to established standards</li> <li>- Evaluate requirements for completeness as per requirements</li> </ul> </li> </ul>		
<b>Perform Loan Processing Function</b>		
<ul style="list-style-type: none"> <li>• Coordinate with broker and borrower regarding financing options* <ul style="list-style-type: none"> <li>- Check/Evaluate documents as submitted in accordance with pre-qualification requirements/checklists</li> </ul> </li> </ul>		
<ul style="list-style-type: none"> <li>• Advise for payment of appropriate fees* <ul style="list-style-type: none"> <li>- Identify/Determine fees/mode of payment/charges and financing options appropriately for coordination</li> </ul> </li> </ul>		
<ul style="list-style-type: none"> <li>• Submit loan application to financing institutions* <ul style="list-style-type: none"> <li>- Identify/Determine loan application requirements (forms/documents) for submission</li> </ul> </li> </ul>		
<b>Perform Property/Management Function</b>		
<ul style="list-style-type: none"> <li>• Coordinate the turn-over activities* <ul style="list-style-type: none"> <li>- Process requirements and arrangements for turn-over activities (punch listing arrangements/coordination)</li> </ul> </li> </ul>		
<ul style="list-style-type: none"> <li>• Assist the broker as to the well-being and conditions of the property* <ul style="list-style-type: none"> <li>- Facilitate negotiations/coordination on issues/concerns as to well-being of properties, restrictions, construction development between buyer and investor</li> <li>- Ensure legality of ownership/documents in accordance with section 29 of RA 9646</li> <li>- Assist broker in accepting inquiries, presenting, scheduled tripping and closing</li> </ul> </li> </ul>		
<ul style="list-style-type: none"> <li>• Coordinate refurbishment or renovation, retrofitting of property/ies* <ul style="list-style-type: none"> <li>- Facilitate permits and bond requirements, documentation for refurbishment/renovation and coordination with the unit owner and broker</li> </ul> </li> </ul>		
<p>I agree to undertake assessment in the knowledge that information gathered will only be used for professional development purposes and can only be accessed by concerned assessment personnel and my manager/supervisor.</p>		
<b>Candidate's signature:</b>	<b>Date:</b>	

*NOTE: \* Critical Aspects of Competency*

**Note to the Candidate:**

Please comply with the following requirements:

1. Wear business/corporate attire
2. Bring calculator and ballpen
3. Avoid using cell phone/smart phone with or w/out camera during the assessment activities.