



The Modern Agent Checklist — Score Yourself

Check each box that accurately reflects your current skill set. This is a diagnostic, not a judgment.

Mindset

- I don't rely solely on buyers or sellers to generate income
- I understand real estate is about structure, not just sales
- I create value before a transaction exists

Opportunity Awareness

- I recognize opportunity even when the market slows
- I can identify investor opportunities vs. retail deals
- I understand how deals begin — not just how they close

Creative Finance Awareness

- I understand alternatives to traditional financing
- I know flexibility can keep deals alive
- I recognize when creative structures solve problems

Project & Execution Intelligence

- I understand fix, flip, and rental deals are projects
- I can follow timelines, risks, and responsibilities
- I add value without overstepping my role

Investor & Capital Literacy

- I understand how money moves real estate deals
- I know the difference between hard, private, and strategic capital
- I recognize when financing affects deal viability

Income Stability

- My income is not dependent on one transaction type
- I remain useful in slow or uncertain markets
- I am building a career — not chasing closings

Your Score: _____ / 18

0–6	Transactional focus — income remains unpredictable
7–12	Developing awareness — skills gaps limit growth
13–18	Modern agent thinking — ready for advanced execution

Next Step: Close the gap. Explore the full Modern Agent Suite and individual course series.



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Creative Finance Series
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