

The background of the entire page is a repeating pattern of small, hand-drawn red hearts on a light pink background. The hearts are arranged in a grid-like fashion, with some hearts having small black dots for eyes.

# FAMILY REUNION

2025

# VISION SPEECH

2025

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# VISION SPEECH

Gary Keller, Jason Abrams, Jay Papasan

Tuesday, February 18th

## HOME SALES: ANNUAL USA

It's not getting progressively better right now  
3-4 years to come out of it  
Lowest in recorded record since 1995

YOU MIGHT BE BUYING AT  
THE TOP OF THE MOMENT,  
YOU ARE NOT BUYING AT  
THE TOP OF THE MARKET

## HOME PRICES: ANNUAL USA

4% trend line - expected appreciation rate of real estate over time  
9.9% above trend line in 2024  
Homes are trending toward affordability

DON'T WAIT FOR THE RIGHT  
TIME TO BUY REAL ESTATE,  
BUY REAL ESTATE AT THE  
RIGHT TIME

## TOTAL MARKET VOLUME USA

Third best market in recorded history  
If you didn't know you would only know it is the third best

## INVENTORY USA

Slow climb but still a climb

## MORTGAGE RATES USA

Just have a solution to the mortgage rate problem

## GDP USA

People are spending at a normal healthy level  
Unemployment is on the rise 4.0  
If DOGE succeeds then unemployment can go up to over 5.0

## ECONOMIC RISKS: 2025

USA

Unpredictable policy: trade, immigration, regulation, spending

Natural disasters

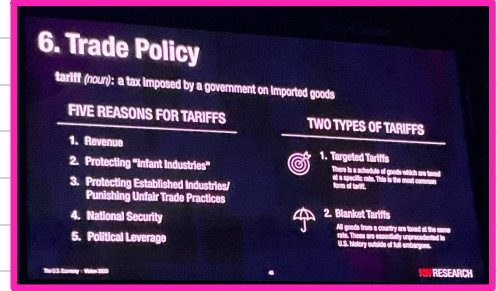
International conflict

## THINGS THAT ACTUALLY MATTER TO REAL ESTATE

Price of real estate

Cost of money

Employment



## TRADE POLICY

USA Tariff

Country A levies tariff on foreign goods from country B

Imported goods from country B become more expensive in country A

Country B retaliates with tariffs

Country A's exports become more expensive in country B

Importers, exporters, and consumers in both countries suffer

Overall trade falls

Economic downturn occurs

Calls for production



REMEMBER PEOPLE  
MOVE BECAUSE OF  
LIFE EVENTS

## U.S. GOVERNMENT REVENUE

USA

1913 - tariffs stopped funding the government

Graph on page 47 of the slide deck

These could be the economic events to reset pricing

## NEW LISTINGS

USA

Communicate with your sellers

Have the conversations around pricing

January is typically the floor

## NEW HOME STARTS

USA

2008 - 2019 all under the trend line which had a problem with the inventory  
Need 2.5 - 3 million more reasonably priced new homes to catch up to the market

## HOME INSURANCE

USA

These prices affect how much your buyers can spend on a house  
Driven by natural disasters

## GENERATIONAL WEALTH TRANSFER

USA

Boomers currently control \$85 trillion in assets almost 50% of all assets

**12. Generational Wealth Transfer**

**EXAMPLE 1** A married couple loans their single child \$500K to purchase a home following the requirements laid out by the IRS. The couple then forgives the amount equivalent to the maximum annual gift tax per parent (\$19K) on the loan, for a total of \$38K. This process can be repeated until the home is fully paid off. If the child is married, the gift amount can also be extended to their spouse, effectively doubling the annual loan.

**EXAMPLE 2** A married couple buys their child a \$500K home in cash and gifts it to them. They file the required gift tax report, falling under their lifetime gift and estate tax exclusion of \$27.98M per married couple. *Note – the lifetime gift and estate tax exclusion falls from \$13.99M to \$5M per gifter after 2025.*

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U.S. Events | Winter 2025 69

# NAR: 2024 PROFILE OF HOME BUYERS AND SELLERS

First time home buyers: 24%      Average age: 38

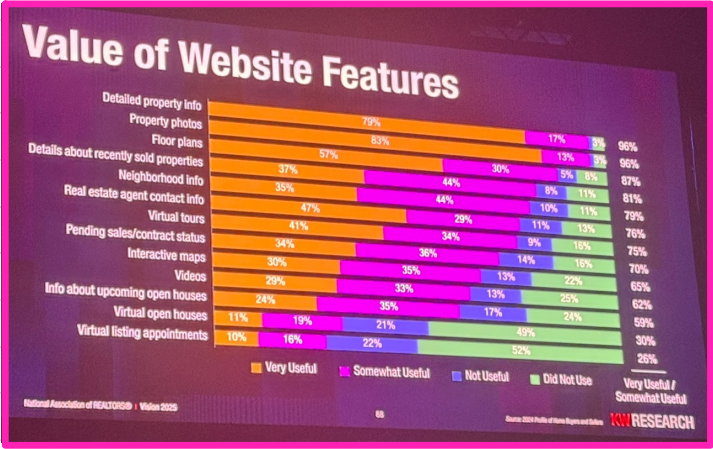
## PRIMARY REASONS FOR PURCHASING

- Desire to own a home
- Closer to family and friends

WHAT IS THE SPECIFIC PROBLEM PEOPLE ARE LOOKING FOR YOU TO SOLVE? HOW DO YOU SOLVE IT FOR THEM

## INFORMATION SOURCES BUYERS USE

Real estate agent: 86%



Method	2006	2010	2018	2019	2020	2021	2022	2023	2024
Referred by (or is) a friend, neighbor, or relative	40%	48%	41%	41%	40%	47%	36%	43%	40%
Used agent previously to buy or sell a home	13	9	12	12	13	13	12	13	17
Inquired about specific property viewed online	N/A	N/A	7	7	7	7	10	7	7
Referred by another real estate agent or broker	5	3	5	6	5	5	6	5	7
Website	7	10	6	5	6	7	9	7	6
Saw contact information on for sale/open house sign	7	6	4	3	3	5	9	5	5
Visited an open house and met agent	7	7	5	5	6	4	3	5	5
Personal contact by agent (telephone, email, etc.)	3	3	3	4	4	3	5	3	4
Referred through employer or relocation company	4	3	2	2	2	2	1	2	2
Walked into or called office and agent was on duty	4	5	1	1	1	1	2	1	1
Mobile or tablet application	N/A	N/A	1	1	1	1	1	1	1
Other	7	7	11	11	10	6	2	6	5

## Buyer Interviews

	2006	2010	2018	2019	2020	2021	2022	2023	2024
One	65%	64%	68%	75%	73%	73%	67%	71%	75%
Two	20	21	20	15	16	16	17	17	16
Three	10	10	8	7	7	7	9	7	7
Four or more	5	6	5	3	4	4	7	4	3

EXPERIENCE =  
KNOWLEDGE

Human nature isn't changing - a lot of the questions asked on the survey are all human nature questions

IF YOU'RE  
NOT FIRST  
YOU'RE LAST

## Seller Interviews

	2006	2010	2018	2019	2020	2021	2022	2023	2024
One	69%	66%	75%	75%	77%	82%	80%	81%	81%
Two	18	19	13	15	13	10	11	12	15
Three	9	10	8	8	7	5	7	6	6
Four or more	4	6	3	3	4	3	1	2	2

# DAY ONE BREAK OUTS

PARTY TIME: HOST UNFORGETTABLE EVENTS THAT  
WOW, CONNECT, AND CONVERT

FIX THE BREAK: CONSULT YOUR ADMIN TO THEIR  
BEST OPPORTUNITY

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# PARTY TIME: HOST UNFORGETTABLE EVENTS THAT WOW, CONNECT, AND CONVERT

Tuesday, February 18th

Facilitated by: Amber Rutherford

Danny Baron, Scott Malouff, and Terra Jorgesen

IT ISN'T ABOUT WHAT YOU GET IT'S ABOUT WHAT YOU GIVE

## CLIENT EVENTS FOR NEW BUSINESS AND REFERRALS

- Create a wow event that people want to attend
- Community events that are focused around their big why
  - Reasons to reach out to your database
  - Name recognition

- Giveaways - fill out forms with questions to collect data for future business
- What is your niche? Who is your target? How are you going to work with them?
  - Throw a launch party      How do you do it again?
- Always have a photographer and a videographer - add it into your budget
  - All the content lives on forever and is reusable

THESE ARE PROSPECTING EVENTS- NOT JUST FOR CLIENTS

## HOW DO YOU CHOOSE THE TYPES OF EVENTS

- Throw events that you like      Do things you enjoy
- Focus on your mission and vision

## HOW DO YOU ASK FOR BUSINESS AT THE EVENT OR AT ALL

- Before the event, fill out a google form to ask about realstate
- Ask at sign in- google form
- Be the people connector at the event for other people who are there

## BUDGETS AND SPONSORSHIPS

- Sponsor packages - sponsor spotlight Saturday
- Ask and leverage your partners
- Know your marketing budget and stick with it
  - Invest money in people over ad spend

## 50 FIRST DATES

50 meetings in 50 weeks

Coffee date: some one you want to get in relationship with

Lunch date: current partner or business relationship

Dinner: VIP

## FOR OTHER EVENTS IN THE COMMUNITY

Talk to the people throwing the event and say you'll send their event out to your database of 4,000. In return can they offer a discount code and give you a booth

## COMMUNITY TIE IN WITH EVENTS

The events themselves can tie into the events

The family friendly nature of the event

Tie in a reason or charity to the event

Toy drive, roof giveaway, backpack, etc

Look back at who you are/were and be the person for them

Do an event to help those people

**BUILD RELATIONSHIPS  
WITH THE PEOPLE WITH  
BILLBOARDS - THEY HAVE  
THE MONEY**

# FIX THE BREAK: CONSULT YOUR ADMIN TO THEIR BEST OPPORTUNITY

Tuesday, February 18th

Monica Keltz, Robert Lucido Jr., Mary Cheatham King

Facilitated by: Nicole Zuber

## SIGNS THAT THE ADMIN RELATIONSHIPS ARE STRAINED

Communication      Engagement      Vibes

When you can identify what it is you can look out for it

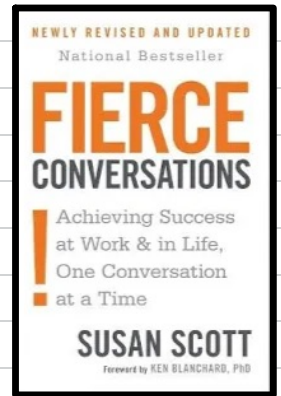
As teams scales, you need to make sure you foster collaboration

Key check in points depending on if it is a mission critical priority

What is the top priority?

How do you create check ins around it?

BEACH BALL



## HAVING DIFFICULT CONVERSATIONS

Ask questions to find out who they are so you know how they want to receive information

Think about your language patterns

Let them know what type of conversation you are preparing to have

Did they understand what it was? **CLEAR INSTRUCTIONS**

Did they understand how? **TRAINING**

Did they understand when? **TIME BLOCKING**

Did they understanding? **MOTIVATION** → This was a hiring problem

If they have clarity during hiring it is easier to have conversations

NOT ALL MANAGERS ARE GOOD LEADERS  
NOT ALL LEADERS ARE GOOD MANAGERS

## ROOT CAUSES OF TENSION: HOW DO YOU KNOW YOU ARE ADDRESSING THE RIGHT ISSUE

Identify → curiosity → identify → solution → review and revisit

Revisit the 4 quadrant conversation before you have the conversation

Discover their motivations → if you know what motivates them you can tie it back

Know what motivates them not you

## CHECK IN SYSTEMS

Off site meetings - always ask how the person is first, is there anything we can be proactive about together, is there anything you are nervous to talk to me about

One-on-one meetings: you have to make sure the "head" and the "heart" are in communication

Give ops the space to have a voice and then take action

You have to have clear expectations and let them do the thing they are hired to do

If you have to micromanage they aren't in the correct role

Let them have ownership to operate

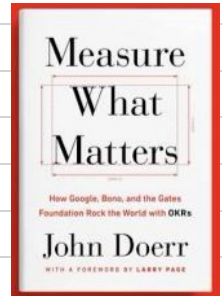
## SET EXPECTATIONS AND BOUNDARIES

Cast a clear vision, understand KPI's

Reset conversation so that you can have the expectation conversation

For everything to mean something you have to have standards

If they walked out the door today would I be upset? That answer will speak volumes



## 3 QUESTIONS YOU ASK FOR CLARITY

Do they want it?

Do they get it?

Do they have the capacity to do it?

## ADVICE IF YOU HAVE A TOUGH RELATIONSHIP

Dive into what is important to them.

Every relationship will rise and fall to the level in which you're willing to spend with them

Come from curiosity

Trust your gut and have the difficult conversations

# DAY TWO BREAK OUTS

THE PATH IS IN THE MATH

MAXIMIZE INCOME THROUGH ANCILLARY  
BUSINESS PARTNERSHIPS

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# THE PATH IS IN THE MATH

Sammi Ferguson, Peter Chabris, Heather Fisher

Facilitated by Ryan Allen

## KEY TAKEAWAYS/AHA'S FROM MAPS COACH KELLY WILEY

It always comes down to tools, systems, or people

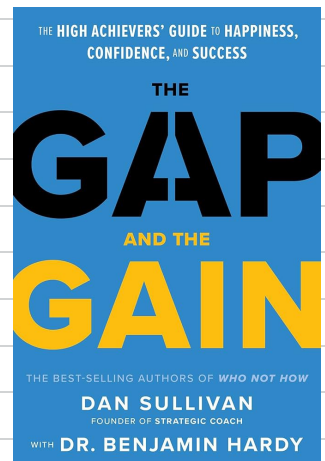
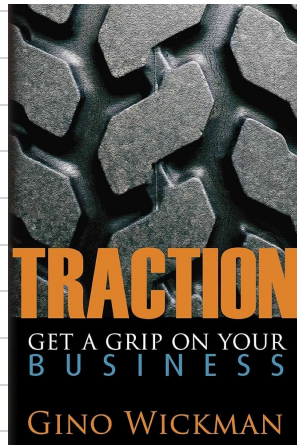
Agents: must track the big 7 - dials made, conversations had, appointments had, agreements taken, contracts written, contracts fallen through, contracts closed

Mercedes are great (sisu as a tracking software) but don't buy a Mercedes if you are going to drive it like a Toyota

One on ones - 20 minutes, focus on activity (what are you doing), productivity (how many do you have signed/ pending), pipeline | what's next - who are you working on to get signed

Data tells facts, people tell stories

Nobody knows if they are winning or losing if you don't keep score



# MAXIMIZE INCOME THROUGH ANCILLARY BUSINESS PARTNERSHIPS

Presented by KW Wealth

Gaurav Gambhir, David Huffaker, Joe Delia, Daniel Dixon, Anna Kilinski

## WHAT SHAPED YOUR DECISIONS TO CHOOSE ANCILLARY BUSINESSES

People on the team want bigger opportunities: how do you create them for them?

Create additional revenue for the team members

Retention and recruiting

Keep your clients in one eco system

Create passive income opportunities

Anything created more noise in our life we created a business around it.

YOUR A BUSINESS  
OWNER- THE HOUSE  
JUST HAPPENS TO  
BE THE WIDGET

## ANCILLARY BUSINESSES *Most fun*

Title Company

Real estate succession planning

Mortgage

Property management: monthly cash flow; long term wealth

## LOOK FOR IN A PARTNERSHIP

Find those who are motivated and it creates opportunity and therefore you have retention

Start with relationships you already have: know, like, and trust

Competency and quality of work

Empire builder and empire protector

Someone who understands the details of the deal-be patient

Don't sacrifice service for money

Core value alignment → do we view things the same way

Are we going in the same direction?

Am I taking a job back?

## LESSONS IN FAILURE

There is no amount of money that is worth your reputation

Need to have very clear expectations set

Need clarity on who is in charge of what

Operating agreement: what happens if it doesn't work out → not just if it does

Documentation on who is responsible for what when

## HOW DO YOU MEASURE SUCCESS

Retention

More closings

Better Service

CONTROL THE  
DEAL, CONTROL  
THE MARKET

## LAST PIECE OF ADVICE

Return on time

Go into it with a business mindset

Take a piece of your unfair share

Check your ego

Always go back to time, money, influence

Don't hesitate to just get started

Understand your P+L

Look at return on energy not necessarily return on investment

# KEYNOTE

Jamie Kern Lima

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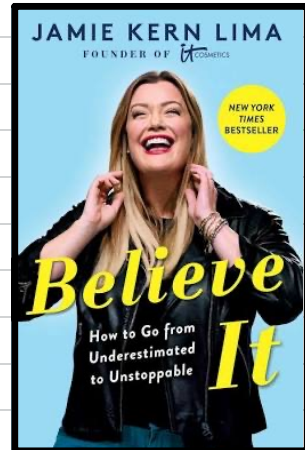
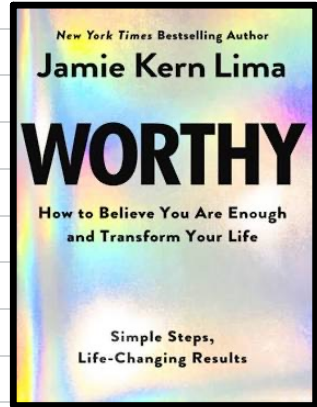
# KEYNOTE

Jamie Kern Lima

DON'T DOUBT  
YOURSELF OUT OF  
YOUR OWN DESTINY

80% of women don't  
think they are enough

73% of men don't think  
they are enough



What has self doubt already cost you?

It's not about learning new things, its about unlearning the lies

When your why is so personal, so much bigger than yourself you want to push harder and go for it

The deep why has to be so powerful and deep that you can't shake it

YOU NEED TO  
MAKE PEOPLE SEE  
YOUR VISION;  
ESPECIALLY WHEN  
YOU BELIEVE IN IT

When you had a vision and you get  
knocked down you have to push and  
keep going

KNOW YOUR  
WHY THEN  
FLY GIRL FLY

The investor may have gave her a no but God  
gave her a knowing

DO YOU LISTEN TO ALL THE NO'S OR DO YOU LISTEN TO YOUR KNOWING?

What is your knowing in your gut?

When you listen to the no's self doubt starts to cost you so much

WHAT IS ONE WAY SELF DOUBT  
HAS ALREADY COST YOU IN YOUR  
LIFE OR IN YOUR BUSINESS

SELF DOUBT LOOKS  
LIKE HIDING IN  
PLAIN SITE

YOU HAVE TO LEARN  
TO TRUST YOUR OWN  
FEELINGS AND TRUST  
YOURSELF



YOU HAVE TO BELIEVE  
THAT YOU CAN

# DAY THREE BREAK OUTS

HOW TO BUY AND SELL REAL ESTATE BUSINESSES

MASTER YOUR ROLE AS AN OPERATIONS  
PROFESSIONAL

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# HOW TO BUY AND SELL REAL ESTATE BUSINESSES

Facilitated by Wendy Papasan

Chase Delperdang, Kelsey Zwack, Matthew Wray, Bob Gifford, Matias Leiva

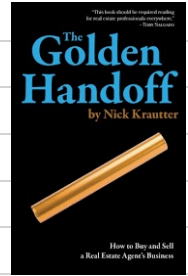
## MERGER AND ACQUIRER - WHAT TO LOOK FOR

Quality of database - not necessarily size - and closed volume from 12 months

Understand the team member contracts to see the quality of the database

Quality = communication records, completes, who owns what

What is your capacity? Can you take on someone's business?



## CULTURAL FIT

Can your culture take on someone else's business?

Open communication with your team is key when you have a merge or change

The riches are in the niches - are you buying the right business if it isn't your niche?

There is a solve for every situation

## HOW DO YOU ACTIVELY PROSPECT FOR BUYING OPPORTUNITIES

Manifesting - be open and prepared to buy so have a plan if the opportunity arrives

Be in the office to curate relationships

Ask the right questions about how they run their real estate business

Silently audition before you even know you are going for it

When you make yourself undeniable who wouldn't want to be in business with you

Talk about it everywhere and be present

## FIRST 30 DAYS

Culture - a lot of one-on-ones, lunch's team buildings

Don't change anything big

Show results of what you do

Just because it mathematically makes sense doesn't mean it won't crush your world

**YOU HAVE TO  
BELIEVE YOU NEED  
A SUCCESSION  
PLAN**

## SELLERS BE DOING IN THEIR REAL ESTATE BUSINESS BEFORE THEY SELL

Prepare your database: make sure the notes are up to date and accurate

### A BUYER WANTS A DETAILED DATABASE

You have to change the mindset to start seeing the other person - it can no longer be about you

## BRANDING

Make it a name not tied to you

Does it make sense to keep current branding?

**IF IT DOES YOU CAN BE "POWERED BY" AND THEN THE BRANDING SHIFTS SLOWLY  
(WHEN BUYING AN EXISTING BRAND)**

When you buy - we are not publicly buying we are partnering. And then there is a slow transition out.

What is the impression you are making

## SOME OF THE OTHER THINGS THAT COME ALONG WITH IT

Exchange ownership rights to everything- all passwords, all social groups, etc.

Any and all existing contracts that are established

Referral partners

## AVOID MISTAKES

Categories of who these agents are

Drop the ego      You don't always have to be right

You always have to be exactly who you are

**IF YOU WAIT UNTIL  
YOU BURN OUT ALL  
YOU HAVE IS ASHES**

## HOW LONG UNTIL THE SELLER IS DONE BEING PAID OFF?

Depends on how long you're involved after the merger usually 2 years there is the time spent in the merge, the handoff, and then the done

In a rainmaker to team member hand off the rainmaker needs to only be involved for a max of a year after the handoff. They have to have a clean break.

# MASTER YOUR ROLE AS AN OPERATIONS PROFESSIONAL

Facilitator: Pam O'Bryant

Tara Copp, Aly Flanigan, Shanna Willman

Scaling the business - people are not perfect  
Think of it as a game of whack-a-mole

## CHALLENGES IN THE MARKET

The operations role is helping to find solutions for the agents on the team  
What tools are available to help the team?

## SKILLS

Time management      Super power  
Organized and critical thinking stalls with the ability to pivot  
Learn to read the numbers: make sure the math makes sense  
You have to understand the MREA to understand the systems and models  
Color code the day to know what you can and cannot move  
Spatial visualization

## TECH

Automation is key  
Technology won't burn out  
Keep it lean and focus on the profit margins  
Maximize what you have before you try something new  
Implementation of Google chats

## KPI'S

Retention  
P+L  
Sponsors and vendors  
Conversion rates

DID THEY IMPROVE  
FROM THE PREVIOUS  
WEEK?

Your job is to raise the red flag when the data shows it isn't going to work

## IMPROVE EFFICIENCY

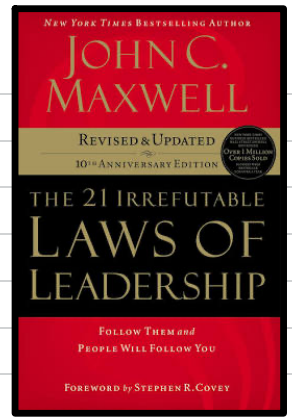
Go to the calendar: where did they spend their time

Help them to become more purposeful

It's not that you don't have time, you don't have the motivation

And the gap and create efficiency's around it

Create and ask great clarifying questions



## CREATE TEAM MEMBER RELATIONSHIPS

In person meetings

Include family members.

You have to earn the right with every person

IF IT'S MEANT TO  
BE IT'S UP TO ME

## RELATIONSHIP WITH RAINMAKER

Trust and communication

Honesty

Everyone has to be on the same page at all times

Be committed to the commitment

You both have to speak the same language and never catch each other off guard

A WELL PROTECTED S  
WILL ACT LIKE A D

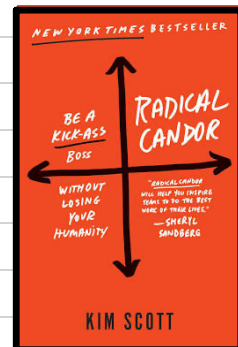
BUILD, SCALE,  
AND PROTECT  
THE EMPIRE

## HANDLE CONFLICT

Clarity is kindness

Directly and quickly as possible

Seek first to understand



## ADVICE

Find the place that Will make the biggest impact

Break the system you have so it can scale