

EXECUTIVE AGENTTM

MAGAZINE

Kim Ward

Executive Agent of the Month


HORIZON REAL ESTATE
PROBATE AND TRUST HELP

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KIM WARD



Written by Haley Freeman - Ian Wiant Photographer

Kim Ward is the visionary broker-owner of Horizon Real Estate, an innovative San Diego real estate firm that has grown to service a unique industry niche.

With good humor, Kim remembers her humble beginnings as a mom reentering the work force. "My own mother had been a real estate broker for 30 years, so when I was ready to go to work, real estate seemed like the right choice," she said. "I went to an adult education center that had night classes, and I paid \$35 for the real estate class. They had a book they wanted us to buy, but every dollar mattered since we were a one-income family. It turned out that I found a real estate book that I could use for the class for 50 cents at a garage sale. I have to laugh about that now."

Kim started out working for Century 21 Award, where she helped clients to buy and sell homes in the traditional market. While there, she met an attorney and assisted his client with a property in probate. That one transaction was a milestone in Kim's professional life. "I really had

no idea what I was doing with that first transaction," she said. "I learned the process as I went along. This is a different business model than a regular transaction – these are people who must sell a house. They are also grieving the loss of a loved one, not just a house. I can nurture people and make things easier on them at the same time that I am helping them with their real estate needs."

In 2004, Kim opened Horizon Real Estate, where she has built a traditional real estate business while perfecting her process for helping clients with properties in probate or a trust. In her first year, Kim assisted 10 probate clients. Today, this niche accounts for approximately 80% of her business.

Along the way, Kim learned how to identify and communicate with these unique clients in a process that involves establishing trust with the executor or administrator as well as the attorney handling the estate. "I have learned how to access public records information to identify the parties, and I make contact with each of them," she said. "When I contact an executor or administrator, I start by offering them my help. I never tell people that this is something they can't do themselves. I also try to offer things that I know are of value to the attorneys and get my name in front of them. This is a delicate situation, and it is especially important to be very respectful and polite to people."

In 2008, Kim became a member of By Referral Only, which expanded her vision of what she could accomplish with her niche business model. "I have to give credit to Joe Stumpf for helping me to start looking at this on a bigger level. I had a private coaching session with him in 2009 where he called this "the big opportunity." He opened my mind to how I could present it to attorneys. The greatest growth of this model has been in the last five years."



TAPPING INTO INSPIRED MOMENTUM

Now, another entrepreneurial opportunity has arisen out of Kim's industry focus. Many of her colleagues have asked her to teach them how to do business in this exclusive market. In answer, Kim is launching a new training site called ProbateBiz.com. "This past year my business partner Sue Carter and I have been passionately working on a training program for real estate agents," she said. "I am frequently approached about how others can build a predictable and successful business through probate. I started thinking about a way that I could share what I do. This web-based training will teach people everything I have learned in the last 10 years, including how to find the clients, how to treat people and how to talk to attorneys."

As Kim has honed her craft, she has developed a systematized approach that is both teachable and easily replicated. This is the same system that she and her team

use every day to ensure that clients receive seamless, consistent service. "By helping people through this process in a systematized way, we make sure that they are comfortable and can go on with their lives. People pay a lot of money when selling a house and it is very important that they receive the best customer service. During our initial consultation we promise the client that they will hear from us every Tuesday with an update, no matter what. Our process helps to keep us on track and deliver on those promises."

Kim emphasizes that even with her system, she would not be able to handle such a high volume of clients without her team. "I can't give enough credit to the team that works beside me. Without Laura, Tammye and Valerie, I couldn't possibly help as many clients feel comfortable throughout the process."





Technology also plays a big part in Kim's service delivery. "I use a CRM that I have tweaked for my business," she said. "With the system in place, it can be run by my assistant, Laura, and other members of our team. The system has a process for each step in the customer cycle, from prospecting to follow-up to managing the transaction. This way, everyone who works with us has the same experience, because the system is in place telling each one of us what we need to do. When something comes up that is not part of the system, it is an opportunity to refine and be better prepared the next time. It is a process that we are constantly improving."

Kim is no stranger to the use of video marketing, and you can view a number of her videos on YouTube. "It's hard to learn how to do video," she said. When I go back and look at my first videos, I laugh at myself. In the beginning, my husband and I built our own teleprompter. Now we have invested in professional equipment and the people to run it. I just have to show up and be the talent and read the script."

This year, Kim and her husband Dave are looking forward to celebrating their 35th wedding anniversary. They have four adult children, one of whom recently married. Dave is a contractor, and over the years he and Kim have

purchased and renovated many properties. At one recent acquisition, a fourplex in North Park, Kim has set up her office. "Our passion for real estate and helping people to grow wealth is shown in our own portfolio," she said. "We own nine rental doors and our own home. We love to tackle the challenges of renovating houses and making the ugly beautiful."

Through ProbateBiz.com, Kim will share with other real estate professionals the processes she relies on for success. "This is a robust training," she said. "I wish I would have had something like this when I started out. The training is designed to teach information in short bursts for busy professionals. You can choose a subject and then view a video training module. It may be 5 minutes or 25 minutes, depending on the subject. We will likely be developing accompanying webinars and teleconferences in the future."

Growing her team and training others to be successful along with her has inspired incredible momentum for Kim and her career in real estate. "I wake up every day with wonder and passion, ready to embrace all the amazing opportunities out there."




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