Special needs clients make up approximately 25% of the clients we interact with every day.

All of them are unique and there is no repeatable formula or “one size fits all” when working with clients with a specific disability or special need. However, there are some best practices and mistakes to avoid.

Most importantly, Realtors should focus on Compassion, Responsibility and Service when working with special needs clients.

After attending this session:

You will have a better understanding of how to interact with special needs clients.

You will learn best practices and common mistakes to avoid when working with special needs clients.

You will understand how Compassion, Responsibility and Service should be our focus when working with special needs clients.
Top 10 ‘Best Practices/Tips’:

1. Review fair housing/disability laws and protected classes
   In addition to the 7 Federal protected classes which includes protection for Physical and Mental Disabilities, there are many state and local level protected classes which may become important to know and may overlap when working with special needs clients such as Family Responsibility or Source of Income.

2. Recognize needs vs. wants
   All clients have “wants”. A swimming pool might be on an able-bodied client’s want list. For a physically disabled client that requires physical therapy, this may be a legitimate need. It’s important to recognize this distinction and account for this when working with special needs clients.

3. Have patience & take your time
   In today’s busy market, finding a home and getting an offer in quickly can seem like running a race. Finding a home for special needs clients can take a lot more time and effort than you expect. The best approach is to take your time and work through things at as natural a pace as required and not rush.

4. Give the appearance that you are treating them like every other client...but do more
   Special needs clients want to be treated like everyone else. Most do not want to feel like they are being treated differently. It can be embarrassing and/or uncomfortable if you are drawing attention when it is unwelcome. However, the extra effort you put in when they are not around is what matters and what they will appreciate the most.

5. Consider adaptability
   Is there a half bath that can be converted easily into a full bath? A full bath that can be converted into a walk-in shower? A garage that can be converted into a rec room (or a rec room back into a garage for wheelchair bound clients)? These are all important adaptable considerations when considering homes for special needs clients.

6. Have meetings scheduled well in advance and be early to appointments
   Many clients with disabilities and/or special needs know that they require extra time to get to appointments. Subsequently, it’s not uncommon for them to be early—which means being “on time” makes you late!

7. Focus on the future
   A home might be perfect right now for your clients—but will it be just as perfect in a year?, 5 years?, 10 years? Think about life changes (aging, children, work/commute distance, etc.) and how a home might become less ‘perfect’ over time.
8. **Be knowledgeable about schools, hospitals and community resources**
   While you can’t know everything about schools, hospitals and community resources, it’s important to know *something* which can be helpful. Are there hospitals, parks, a gym, schools with specialized programs, etc. close to where your clients are looking? There are free hospital locator apps available which can be very useful when in the field looking at homes.

9. **Preview homes**
   Don’t count on showing up for the first time at a property and everything being ok. Previewing homes ahead of time will ensure you avoid access issues, hazards, limitations and potential pitfalls that could be embarrassing, dangerous or clearly not acceptable to your clients.

10. **Be flexible**
   Special needs clients have bad days—some very challenging. No matter how bad your day is going it usually can’t top what your special needs clients are dealing with on a daily basis. Stay positive and flexible. Have compassion and understanding.

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**Top 10 Mistakes to Avoid:**

1. **Assuming what your clients can and **cannot** do**
   One of the biggest issues when working with special needs clients is assuming too much about them (or even too little). It’s best to ask what limitations or requirements your clients have and take each on an individual basis.

2. **Being too much of an expert**
   Agents understandably wear many hats: handymen, house cleaners, fortune tellers, marriage counselors, etc. One thing we are not, however, are doctors. Special needs clients hire us solely for our expertise in our field. Even as “Type A” professionals with answers for every challenge, it’s not advisable to cross into the area of medical/health advice.

3. **Putting a square peg in a round hole**
   Just because a home is outfitted for disabilities or special needs does not mean it will be “perfect” for our clients. MLS systems (and the agents using them) have become better at tagging and identifying homes with disability access but it doesn’t always mean that every home will be the perfect fit.

4. **Not setting expectations**
   Searching for a home with special needs clients can be a heavy lift. It’s important to set expectations with your clients about relative scarcity, market conditions and inventory which may make their search take longer.
5. **Not asking about specific needs**
   Every special needs or disabled client has a unique set of needs—many of which may not be obvious. One that is often overlooked are needs related to caregivers. It’s also very important to consider mass transit options, “walk score” and distance to nearest relative/caregiver/medical aid.

6. **Overdoing it**
   Stay in your lane! Feeling compelled to do more is natural and should be expected when working with special needs clients. However, there is a point where too much unwanted help can backfire or be negatively perceived.

7. **Not following through in a timely manner**
   Getting answers from listing agents and property managers related to accessibility and amenities may take additional time. Ask these questions early so there isn’t a delay in providing important information back to your clients.

8. **Waiting too long to reach out to other agents/running out of ideas**
   The beginning of the home search process is the ideal time to reach out for additional help from other agents. It will likely turn up additional options and insure you don’t wind up running out of options and ideas.

9. **Not getting a family member involved when necessary**
   Some clients with a physical or mental impairment may need the assistance of a family member (parent, sibling or other closely located relative) to assist them through the process. Realizing this early in the process will ensure you don’t get too far before having to recalibrate or start over.

10. **Having clients work with the wrong lender**
    Pairing special needs clients with a knowledgeable and patient lender can have a huge impact on a transaction. Not only is it important to work with a lender that has specific options and programs, but it’s also critical to have someone that is patient, sensitive and compassionate.
John Young is a Realtor in the Maryland/DC/northern Virginia area and is the incoming MD/DC 2020 CRS President. He has helped hundreds of clients in very challenging situations by focusing on Compassion, Responsibility and Service.

Prior to real estate, John worked for the New York Times Company in advertising sales and then for Schering-Plough Pharmaceuticals as a sales rep and manager. He and his wife have a non-verbal daughter with autism.

Professional Licenses and Certifications:
- Licensed in Maryland, Washington DC and Virginia
- CRS (Certified Residential Specialist)
- RE/MAX "Hall of Fame" and "Platinum Club" member
- ABR (Accredited Buyer's Representative)
- BPOR (Broker's Price Opinion Resource)
- CLHMS (Certified Luxury Home Marketing Specialist)
- GREEN (Member of NAR Green REsource Council)
- MRP (Military Relocation Professional)
- SFR (Short Sales and Foreclosure Resource)
- Member - VAREP (Veterans Association of Real Estate Professionals)