

Danilson Law Presents...

DIGITAL INNOVATIONS IN REAL ESTATE TRANSACTIONS



Meet the...

Danilson Law Team

- Jeremy Danilson - Attorney/Owner
- Sara Danilson - Operations Manager
- Ashley Johnson - Senior Paralegal
- Ashle Bray - Associate Attorney
- Candela Lopez - Jr. Paralegal
- Mark Carzano - Technology



Guided by our...

Core Values

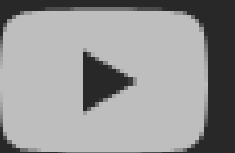
- Always be Humble and Kind
- Be Intentional with Everything You Do
- Always Tell the Truth





Video unavailable

[Watch on YouTube](#)



Welcome to...

Technology Uses in Real Estate

CRM/Law Management Tool

Videos

Client Communication

Remote Online Notary

Electronic Signatures

Document Management
Systems

Payment Platforms

Automation

Social Media

PDF ABSTRACTS

AI???

Why...

Client Satisfaction



Rachel Bradley
5 reviews



★★★★★ a year ago

Absolutely LOVED our experience with Danilson and all of the team members. I have NEVER had an easier time making an out of state real estate transaction, and I've actually done this a lot over the years. On this particular transaction, we needed extra attention to assist a senior family member in completing things on her end. The Danilson team all went out of their way to help and make it as easy as possible for her. Communications were excellent, I loved the ease to follow emails and they were always available to chat if I had questions. The virtual notary system also made closing a breeze! If we purchase anymore homes in the area, you can bet they're the first only ones I'll call!



Toccara H
Local Guide · 2 reviews



★★★★★ 2 weeks ago **NEW**

Pleasant group to work with. Great communication, timely responses. Love that everything is completed via email or virtually. Highly recommend for your real estate needs.



Local Guide · 32 reviews · 8 photos



★★★★★ Apr 23, 2023

I have used many law offices over the years for closing and this was by far the best. Very easy to close - communication, dates, drafts, etc. were set out clearly and timely by email. Extremely smooth transaction and thorough explanation. Signatures for buyer/seller were inked on different appointment dates which cut down on wasted time for both parties - smart.



4 reviews · 0 photos



★★★★★ Mar 20, 2023

I was looking for an attorney and found Danilson Law Firm From our very first conversation to the very end of signing papers .The process was very simple, easy and very stress free. There entire team is wonderful.They also have very fair prices I would 100 percent recommend them to anyone.

Why Implement ... CRM/ Law Practice Management Tools

- Boost Efficiency & Organization
 - Centralized tracking allows you to keep all client matters organized and accessible.
- Enhance Client Focus
 - Keep all calls, meetings, emails, texts, and files in one place, ensuring the entire team stays informed and aligned.
- Drive Growth
 - Manage and optimize your pipeline for increased business success

Our “Domino Tracker”... StreakCRM



Title Opinions 5938 Number Set ▾

🔄 | 📄 | 🔗 | + Share | ⋮ | +

0 Orders to be Pr... 94 Waiting for Ab... 3 Reviewing Abst... 0 Typing 178 Commitment .. 437 Need POST .. 2.6K Final Sent

← Title Opinions > 2503 Eagle Ridge Drive, Granger

+ Add comment

💬 ✓ ☎ 📋 📎

All Emails Files Comments Tasks ⋮

✉ **Eagle View Plat 1 (Granger) - Harney Industries** 3 11mo ago
Jeremy D, .Wetsch, David L - Thanks for the quick reply David! Jeremy...

📎 image003.png

📎 image004.jpg

Jeremy D changed the stage to **Closed**

✉ **2503 Eagle Ridge Dr., Granger, IA** 2 3y ago
Chad Lyman, me - Thank you! · On Thu, Jan 14, 2021 at 1:56 PM Chad...

📎 2021_01_14_13...

✉ **2503 Eagle Ridge Dr, Granger / Dreamland Homes, LLC** 2 3y ago
Laura Spire, me - Received, thank you! · On Tue, Jan 12, 2021 at 8:12 ...

Stage

Assigned To

🟡 Closed ▾

👤 Jeremy D

➤ Orders to be Processed

➤ Waiting for Abstract

➤ Missing Order

➤ Reviewing Abstract

➤ Review Coda

➤ Typing

Why Implement ...

Client Communication

- Multiple Channels:
 - Phone Calls, Texting, Emails, Chat Box & In-Person Meetings.
- Multiple Benefits:
 - Tailored Experience, Stronger Relationships & Competitive Advantage.

A True Story...

Real Life Example

Feedback & Reviews

Automated Voicemail
Reminders

Time-Sensitive Matters for
Unavailable Clients

Why Implement ... E-Signatures

(DocuSign, HelloSign, PandaDoc, Dotloop)

Simplify the Process: Sign documents from anywhere at any time.

Boost Speed: Accelerate transactions, reduce delays.

Enhance Security: Encrypted and legally binding platforms protect client information and ensure compliance.

Increase Convenience: Easy for *clients* and professionals, making transactions *smoother*.

A True Story...
Real Life Example

Hospitalized Child

Contentious Situations

Out-of-State Clients

Why Implement ... Payment Platforms

(LawPay, Xero, LexCharge, ConfidoLegal, TrustFunds)

Compliance and Trust

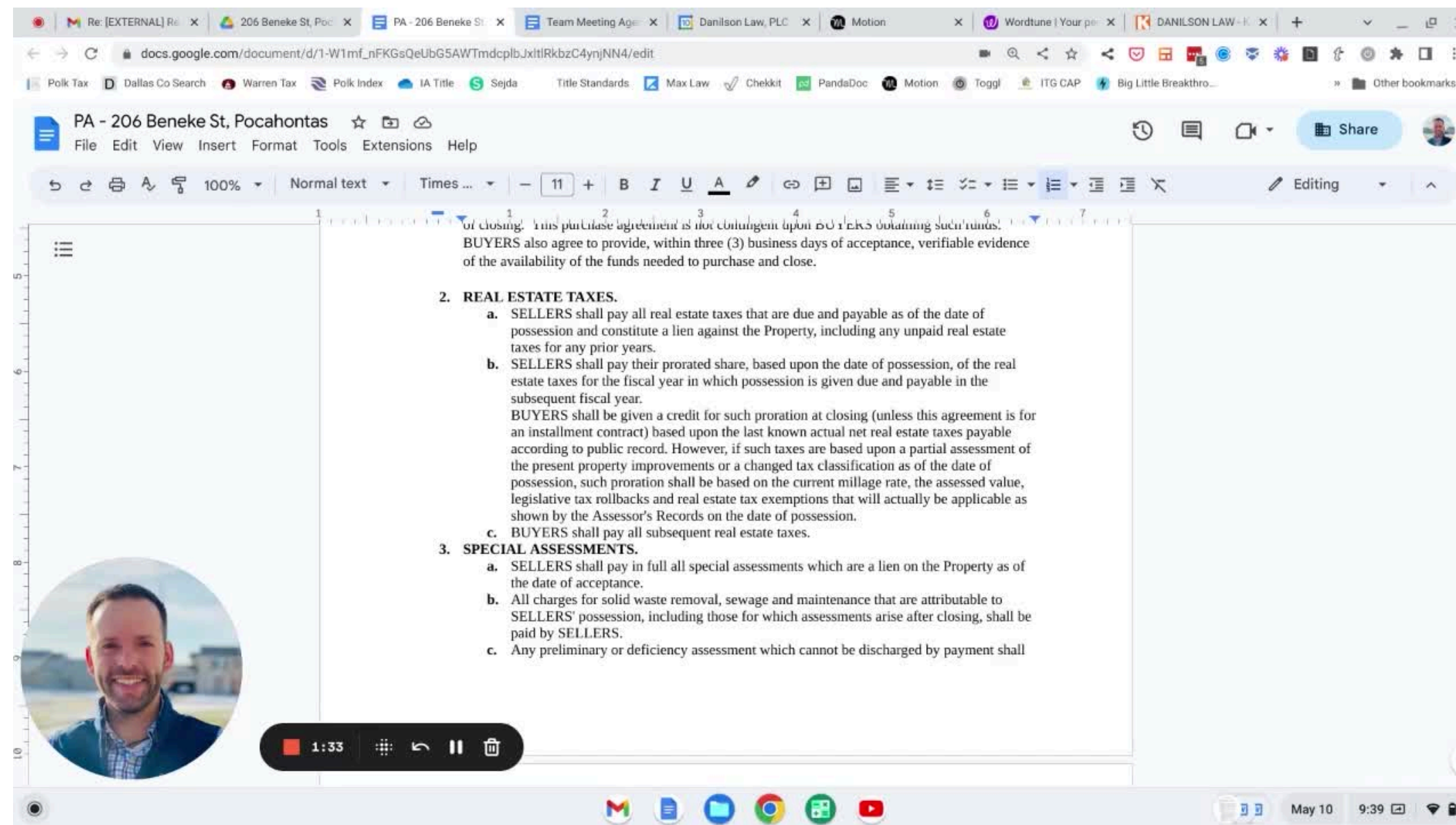
1. Ensure all transactions are meeting industry regulations.
2. *Secure and Professional* payment systems enhance client trust.

Client Convenience

1. Clients can pay *quickly and easily*, improving your cash flow.
2. Provide a *seamless* experience leading to *client satisfaction*.

Why Implement ... Videos

Client Education & Updates



PA - 206 Beneke St, Pocahontas

File Edit View Insert Format Tools Extensions Help

Normal text Times ... 100% + - 11 B I U A

of closing. This purchase agreement is not contingent upon BUYERS obtaining such funds. BUYERS also agree to provide, within three (3) business days of acceptance, verifiable evidence of the availability of the funds needed to purchase and close.

2. REAL ESTATE TAXES.

- a. SELLERS shall pay all real estate taxes that are due and payable as of the date of possession and constitute a lien against the Property, including any unpaid real estate taxes for any prior years.
- b. SELLERS shall pay their prorated share, based upon the date of possession, of the real estate taxes for the fiscal year in which possession is given due and payable in the subsequent fiscal year. BUYERS shall be given a credit for such proration at closing (unless this agreement is for an installment contract) based upon the last known actual net real estate taxes payable according to public record. However, if such taxes are based upon a partial assessment of the present property improvements or a changed tax classification as of the date of possession, such proration shall be based on the current millage rate, the assessed value, legislative tax rollbacks and real estate tax exemptions that will actually be applicable as shown by the Assessor's Records on the date of possession.
- c. BUYERS shall pay all subsequent real estate taxes.

3. SPECIAL ASSESSMENTS.

- a. SELLERS shall pay in full all special assessments which are a lien on the Property as of the date of acceptance.
- b. All charges for solid waste removal, sewage and maintenance that are attributable to SELLERS' possession, including those for which assessments arise after closing, shall be paid by SELLERS.
- c. Any preliminary or deficiency assessment which cannot be discharged by payment shall

1:33

May 10 9:39

Why Implement ... Videos Team Training

Danilson Law Team Hub
My docs

Search

My bookmarks

- Job Scorecard
- Services & Pricing
- Attorney Referrals
- OPERATIONS
 - SOP
 - Workflows
 - Pipeline Overview
 - Commitments & Fi...
 - Helpful Firm Tools
- EDUCATION
- TEAM CALENDAR
- TEAM MEETINGS
- WORKSPACE
- Flow Charts

Search

For closings we settlement age

contains any of

Search

- ☐ #TRANSACTIONS
- ☐ #TITLE OPINIONS
- ☐ #INTAKE
- ☐ #OPERATIONS
- ☐ #OTHERS
- ☐ #TITLE ORDERS
- ☐ #TITLE EXAMINATION
- ☐ Blank

Select all

- Sending a Preliminary Title Opinion
- Sending Final Certificates
- Final Title Refinance Abstract Update
- Typing a Final Title Opinion
- Purchase Final
- How to Send a Title Commitment
- Final Certificate - Refinance - No 901
- How to Amend / Update a Title Commitment

Step-by-Step Process

Sending a Preliminary Title Opinion

2 min 23 views

NE 55th St.

Tools Add-ons Help Last edit was seconds ago

100% Normal text Times New... 11 B I U A

1 2 3 4 5 6 7

DANILSON
—LAW, PLC—

6165 NORTHWEST 86TH ST
JOHNSTON, IA 50131
PHONE 1 515 512 5500
FAX 1 515 493 4242

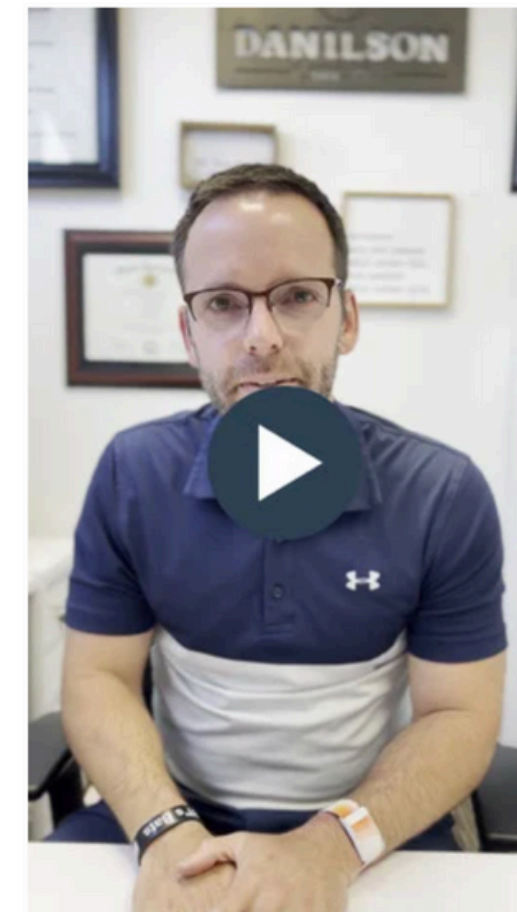
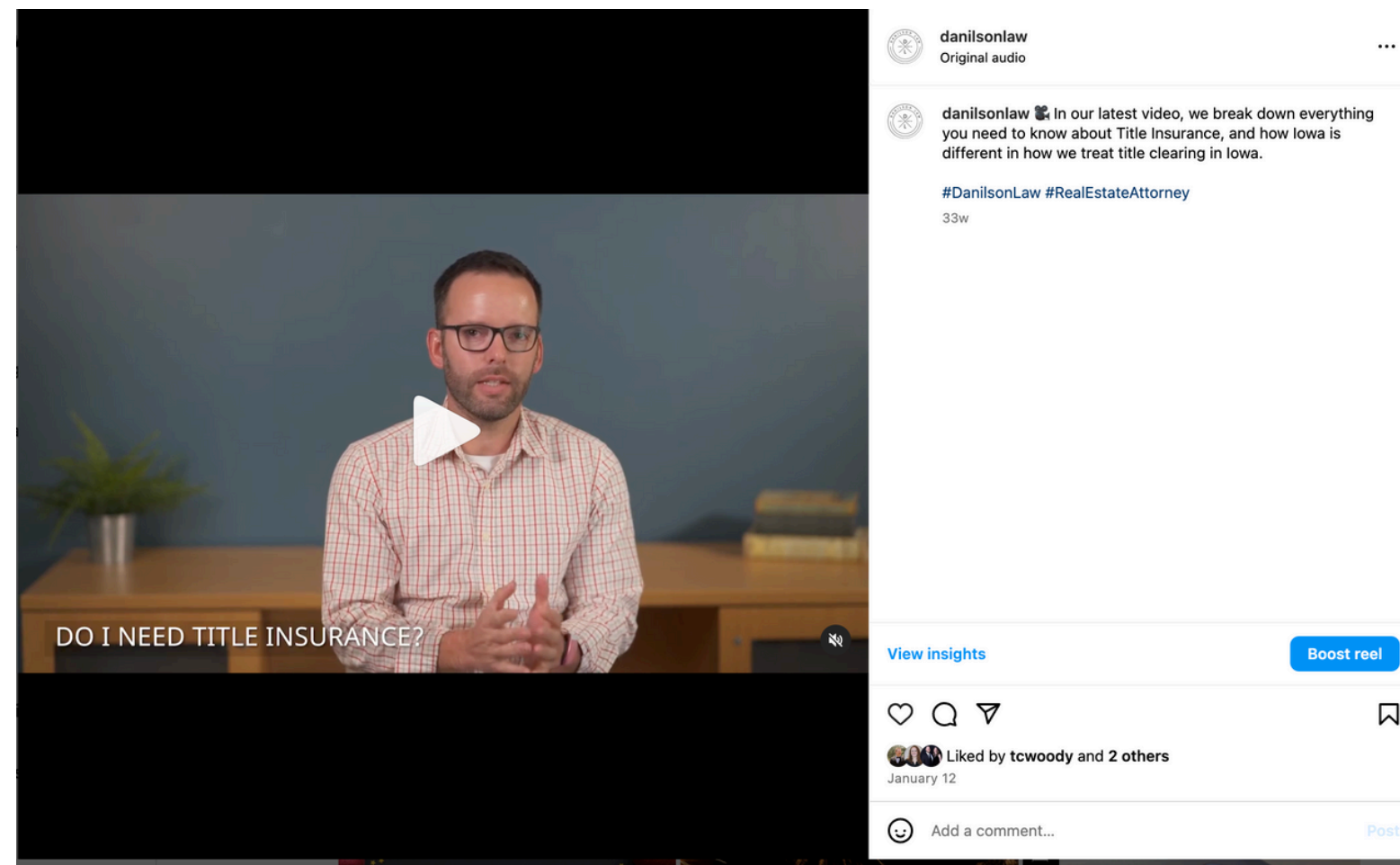
SUMMARY

This document has been generated on Mar 10, 2022 5:01:15 PM by Ultradox

- Title Opinion
 - Sending Final Certificates
 - Final Title Opinion - Refinance Abstract Update
 - Typing a Final Title Opinion
 - Purchase Final
 - How to Send a Title Commitment
 - Final Certificate - Refinance - No 901
 - How to Amend / Update a Title Commitment
 - Revising a Title Commitment Upon Request
 - Typing a Title Commitment
 - Typing Preliminary Title Opinion

Why Implement ... Videos Marketing

Get the Recipe Here!



Meet Jeremy Danilson!

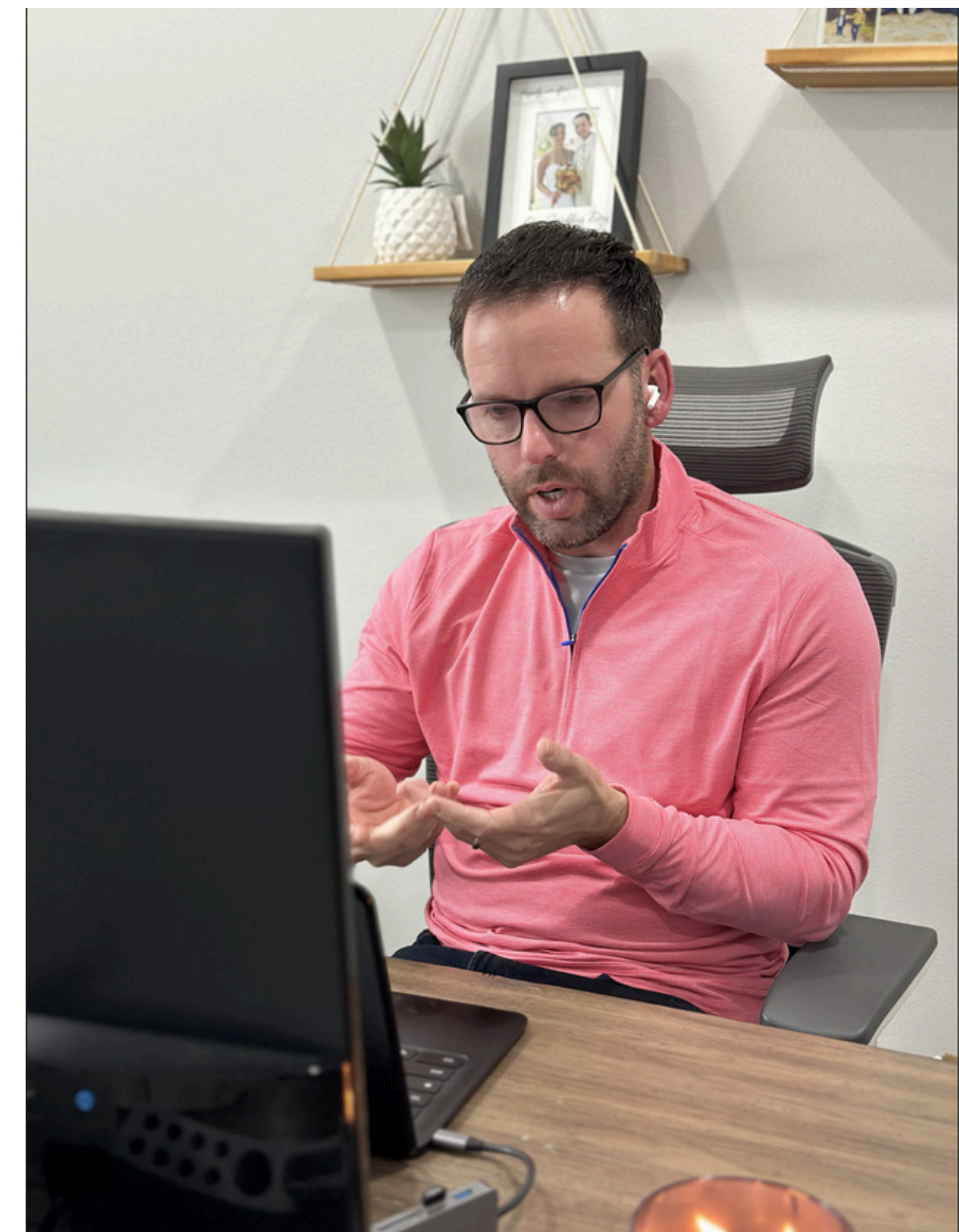
Starting as a corporate attorney after graduating from Drake Law School, I quickly realized that I had a different vision for my career. In 2015, I founded Danilson Law with a focus on a future-oriented, client-centered approach. My background in business education from Grand View University, a brief pursuit of professional golf, and the patience I've gained as a lifelong Cyclone fan have uniquely equipped me to serve clients outside the traditional legal model. I operate Danilson Law based on core values that I hold dear: Be Humble and Kind, Always Tell the Truth, and Be Intentional in Everything We Do.



Why Implement ... Remote Online Notary

(“RON”)

- Maximize Flexibility
 - Easy for busy/unconventional schedules
- Accelerate Transactions
 - Eliminate the need to travel, speeding up the process and keeping deals on track
- Stand Out in the Market
 - Appeal to modern clients who value convenience and security, setting your firm apart.
- And *FINALLY* ...



BOOST SECURITY!

- Encrypted Sessions
 - All notarizations are conducted in encrypted, recorded video sessions for maximum protection.
- Audit Trail
 - RON provides a detailed log of the entire notarization process, enhancing transparency and security.
- Protect Clients
 - Shield your clients from fraud and unauthorized transactions, building trust and ensuring peace of mind.

A True Story...

Real Life Examples

Seller Representation Fraud

Military Families

Out-of-State Buyers/Sellers

Why Implement ...

Document Management Systems

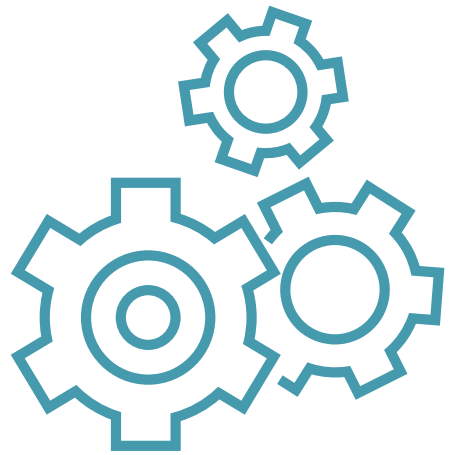
(Google Drive, Dropbox, OneDrive, Dotloop)

- Document management systems enhance collaboration, security, and accessibility.
- The transparency and reliability they offer increase client confidence, leading to smoother and more controlled transactions.

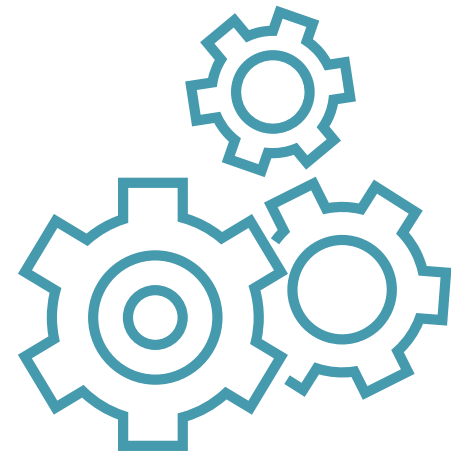
Why Implement ...

Automation

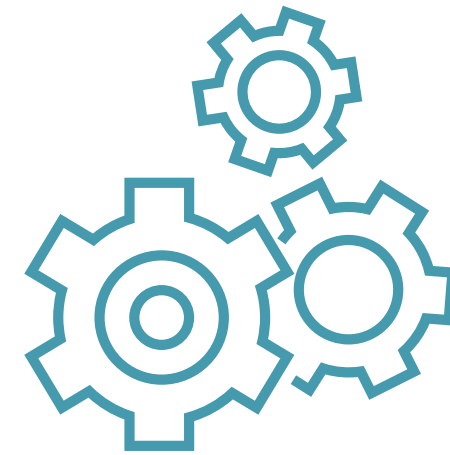
(Zapier, Make, Integromat, kvCORE)



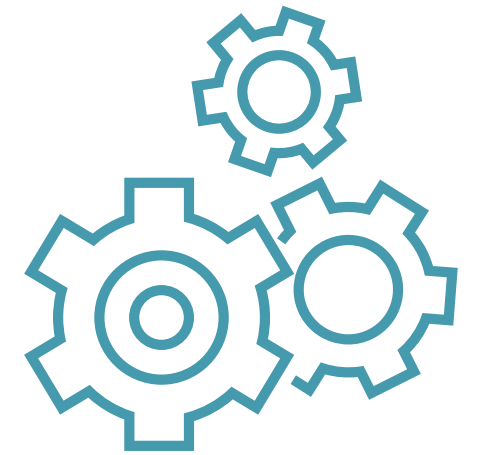
Great for
repetitive tasks



Avoid
Duplicate
Data Entry



Invoice
creation



Sales follow up
(text and email)

A Live Look...

Title Tracker

	PROPERTY ADDRESS 🏠	ORDER RECEIVED 📅 17	CLOSING 📅 17	ABSTRACT RECEIVED 📅 17	COMMITMENT SENT 📅 17	STATUS 🇮🇹
1	210 School Street, Gilbert	5/2/2024	6/14/2024	5/14/2024		Attorney Review
2	709 41st Street, Des Moines	5/9/2024	6/15/2024			Not Yet Received
3	4016 46th Street, Des Moines	5/23/2024	6/18/2024			Not Yet Received
4	248 East Center Street, Des Moines	6/1/2024	6/21/2024			Attorney Review
5	620 S Stone St, Sigourney	6/14/2024	6/28/2024			Attorney Review
6	1425 Park Avenue, Des Moines	5/7/2024	6/29/2024			Not Yet Received
7	1203 West Mamie Eisenhower Avenue, Boone	6/14/2024	7/5/2024			Not Yet Received
8	1400 South 52nd Street, Unit 51, West Des Moines	6/27/2024	7/13/2024			Not Yet Received
9	715 East Bremer Avenue, Waverly	6/25/2024	7/16/2024	7/17/2024	7/17/2024	Attorney Review
10	1002 South Buxton Street, Indianola	6/14/2024	7/27/2024			Not Yet Received
11	704 East Euclid Avenue, Indianola	7/16/2024	7/27/2024			Not Yet Received
12	1009 Highland Avenue, Iowa City	7/19/2024	7/31/2024			Not Yet Received
13	2618 Shadow Creek Lane, Des Moines	7/8/2024	8/2/2024			Not Yet Received
14	1225 Roosevelt Avenue, Ames	6/26/2024	8/6/2024			Not Yet Received
15	1107 Northwest Benjamin Drive, Ankeny	7/12/2024	8/11/2024	8/13/2024	8/13/2024	Commitment Sent
16	3913 Southeast 15th Street, Des Moines	7/11/2024	8/15/2024			Attorney Review
17	14218 North Valley Drive, Urbandale	7/30/2024	8/17/2024	8/10/2024	8/10/2024	Commitment Sent
18	2152 West Vintners Dr, Osceola	8/20/2024	8/17/2024	8/27/2024	8/27/2024	Commitment Sent
19	2431 Southeast Creekhill Way, West Des Moines	8/19/2024	8/21/2024			Not Yet Received

Why Implement ... PDF Abstracts


- Accuracy
 - Optical Character Recognition (“OCR”) allows you to copy and paste the legal description directly from the PDF document - reducing minor errors on transfer documents.
- Efficiency
 - Reduces delivery time by 2-3 days




ROOT OF TITLE ABSTRACT	
No. N1760405	
TO	
Commencing 50 feet East of the Southwest corner of Wilson's Four Acre Lot in Winterset, Madison County, Iowa, and running thence North 178 feet, thence East 72 feet, thence South 178 feet, thence West 72 feet to the place of beginning, being otherwise known as the East 72 feet of the West 122 feet of the South 178 feet of Lot Four (4) of said Wilson's Four Acre Lot,	
From Root of Title to February 13, 2012 at 8:00 A.M.	
----- Entry #1 -----	
Notice is hereby given that this Root of Title abstract is prepared pursuant to Sections 614.29 through 614.38 of the 1971 Code of Iowa, Chapter 11 of the Iowa Land Title Association Examination Standards and the Abstracting Standards of the Iowa Land Title Association.	
All matters of record prior to the date of the recording of the root of title are omitted herefrom except:	
<ol style="list-style-type: none">1. Plats and Surveys;2. Easements;3. Party wall and other boundary line agreements;4. Unexpired recorded leases;5. Patents (Unless shown by Original Entry)	
----- Entry #2 -----	
United States To State of Iowa	The 500,000 Acre Grant Dated September 4th, 1841



Take a Look at..

Title Review Notes

3714 SE 10th St, Des Moines

 Coda!

 0  


 9 sec  8 views


Chain of Title Mortgage Release Con...

3/28/2024

3714 SE 10th St, Des Moines

<input type="checkbox"/>	Entry No.	Type of Entry	Type of Deed	Action	Release Bk/Pg	Notes	Date	Canvas
	42	Restrictions		Show	-			
	43	PLM		Show	-	Southern Knolls Pl...		
	7		Warranty		-	Counryman		
	4	Mortgage			2000-666			
	3		Warranty		-	City of DSM		
	4		Warranty		-	Dodley		



 1.2x
9 sec ⚡ 8 sec

A Look at...

Digital Abstract Receipts

Front Desk Processor

Abstract Company *

Iowa Title

American Abstract

Bill Blue & Associates

Iowa Title

Midwest Community Title

Peoples/ Statewide

Russell Abstract

Title Services DM Corp

← Title Opinions > 207 12th Avenue Northwest, Altoona

Abstract Received

Nov 20

Abstractor that did Continuation

Iowa Title

Abstract Location

Iowa Title

Abstract Pick up Date

Nov 30

Title Objections

Mortgage

Commitment Sent

Nov 20

TO Check Received

Incentive

Rapid Certificate

Owner Cert Sent

Appraisal/ Survey

Google Drive ID

1OdUD04cs4gV3aJa8-tkOvOh4ivtzNqMx

PDF Abstract

Rural Abstractor

Assigned Attorney

Andrew

HOA in Abstract?

Typed by Ashley

TO Payment

Final Certificate(s) Sent

Cancelled Date

Lender Certificate Sent

Construction Loans

Appraised Value

Link to Abstract Receipt Form

<https://docs.google.com/document/d/16VwP-GShU1L8TTmqi79paLyGDSotbNxTgeHVQWMK5F4/edit?usp=drivesdk>

Abstract Pick-Up Receipt

Abstract Company: Iowa Title

Property Address: 1221 Illinois St, Des Moines

Pick up Date: 2024-09-03

Justin Tew

Courier Name: Justin Tew - Per Mar Security

AI @ Danilson Law – Our First Steps

Saving time, creating better client experiences

Tools We Are Exploring

- Chat GPT
- Grok
- Google NotebookLM
- Voice AI

How We're Using AI

- Streamlining Workflows
- Turning CLEs into podcasts
- Training staff for better client calls
- Testing voice reception

Fraud Detection via AI

- \$4,000 fraud detected in February
 - constant stress/ worry
- AI Reviewed 12 months of statements for similar transactions and patterns
- Protects Owner's resources and time



Custom GPT

- Role-plays client call-backs in voice mode
- Trains associate attorney dynamically
- Improves client interactions quickly
- Custom built w/ firm specific resources
- Cuts training time and costs
- Builds confidence faster



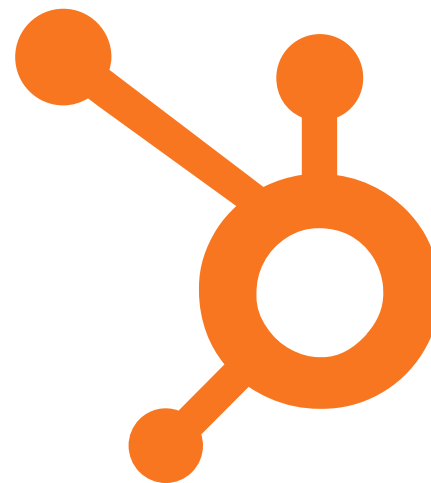
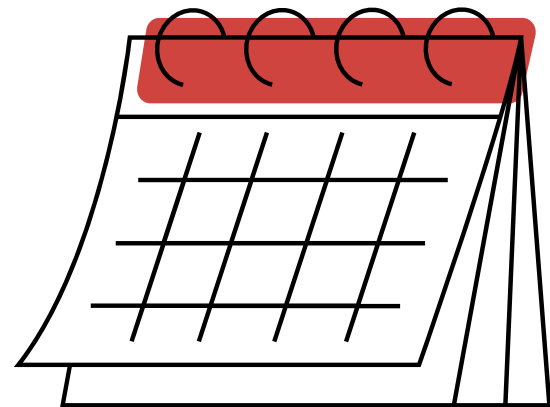
Google Notebook LM

- Podcast Learning
 - Turn CLE Outlines into Podcasts
 - Dynamic, Engaging training
 - Boosts Team Skills Efficiently
 - Repurposes Existing Content
 - Keeps team knowledge current



Voice AI

- Conversational AI for client calls
- Handles Overflow
 - Schedule Call backs?
 - Updates CRM?
 - Filters unqualified calls/ Solicitors?
 - Warm Transfers to team during day
- Saves time, enhances client experience
- Integrate w/ your CRM
- Consistency in how phones are answered



Maya

Sesame



Closing Thoughts...

“Little things done well make big things happen.”



Small, consistent improvements through technology lead to smoother, more efficient real estate transactions.

Q&A Session...

Let's Make Real Estate Simpler Together.



Get In Touch...

SCAN ME



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Sara Danilson

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Sara@DanilsonLaw.com