

Realty Icons

Real Estate Transaction Checklist

Realtor: _____ Closing Date: _____

Client(s) _____

Phone#: _____

Address: _____

MLS number: _____

Date of sale: ___ / ___ / ___

Target closing date: ___ / ___ / ___

Answer – Yes, No or N/A = Not Applicable

I. Upon First Substantive Conversation with the Prospect	Answer/ Date
1. Information About Brokerage Services reviewed, signed and in file?	
2. Buyer Representation Agreement?	
3. Is the buyer preapproved?	
4. Listing Agreement?	
5. Correspondence or conversation log maintained?	
II. Upon Acceptance of Final Contract	
6. Obtain and deposit earnest money with title company within 2 days?	
7. Advise buyer/seller of option period and time deadlines?	
8. Order a complete home inspection? Mechanical, structural, electrical, roofing & plumbing	
9. Order a Termite Inspection?	
10. Is there a pool, order a pool inspection?	
11. Provide lender a copy of the contract?	
III. During Home Inspection	
12. Remind buyer to take measurements for furniture, windows, appliances ect.?	
13. Take any photos of the house if desired?	
14. Advise buyer to ask Home Inspector any questions/concerns?	
15. Advise buyer to Notify lender to order appraisal upon signed Amendment for repairs?	
IV. Two Weeks Before Closing	
16. Advise buyer to contact insurance company to set up homeowner's policy?	
17. Call lender and inquire if additional info is needed?	
V. One Week Before Closing	
18. Make contact with the lender to ensure that closing date is on schedule?	
VI. Three Days Before Closing	
19. Ask Title Company for the Closing Disclosure?	
20. Verify that all repair items in the inspection Amendment have been addressed?	
21. Remind the Buyer of online banking fraud and to verify wire instructions with title?	
22. Reserve a moving truck or schedule a moving service?	
VII. Day Before Closing	
23. Conduct final walk through to verify the condition of the house?	
24. Transfer all utilities to Buyer's name?	
25. Remind seller if represented to transfer utilities out of their name?	
26. Remind buyer to review Closing Disclosure?	
27. Get a change of address package from the US Post office?	
VIII. Closing Day	
28. Remind clients to Bring Photo IDs?	
29. Remind client to bring certified funds or funds by wire instructions verified with title?	
30. Signed final Closing Disclosure in file?	