

buyers agent TRANSACTION CHECKLIST

BUYERS:

CLOSING DATE:

- ☐ Get buyers pre-approved
- ☐ Have buyer sign broker rep forms
- ☐ Upload pre-approval to client's file
- ☐ Go house hunting
- ☐ Request Sellers Disclosure on homes of interest
- ☐ Run CMA's on home of interest
- ☐ Notify listing agent of incoming offer
- ☐ Send to listing agent with 1-4 contract
 - ☐ Pre-qual letter and financing addendum
 - ☐ Signed Sellers Disclosure & Water District
 - ☐ All other applicable addendums
- ☐ Download all listing docs from MLS
- ☐ Send executed contract to buyers & lender
- ☐ Send option money to listing agent
- ☐ Send earnest money to title company
- ☐ Have buyer schedule inspections
- ☐ Order home warranty
- ☐ Download MLS pending sheet
- ☐ Ask lender about appraisal
- ☐ Remind buyers to get home insurance
- ☐ Order closing gift
- ☐ Follow-up with lender
- ☐ Obtain loan conditions
- ☐ Obtain loan approval
- ☐ Schedule final walk-through
- ☐ Remind buyer to transfer utilities
- ☐ Confirm lender docs are at escrow
- ☐ Get receipt of lender docs at escrow
- ☐ Broker review of documents
- ☐ Schedule closing day
- ☐ Final walk-through
- ☐ Order preliminary closing statement
- ☐ Follow-up with lender
- ☐ Submit closing file to broker
- ☐ Close file & celebrate!

EXTRA NOTES: