



Buyer Transaction Checklist

Property Address:
 Client:
 Relationship Date:
 Buyers Agent:

Sale Price:
 UC Date:
 Closing Date:
 Buyers Attorney:

Phase	Day	Activity Description	Progress	Due	Completed	Notes
Search	0	Send intro email (pref vendors)				
Search	0	Obtain seller mortgage / financing info				
Search	0	Buyer Agency / Brokerage Agreement				
Search	0	Brokerage Relationship / WWRE				
Search	0	Setup Client/ add docs to brokerage compliance				
Offer	0	Ensure pre-approval / POF is correct				
Offer	0	Assist with doc /signatures as req by agent				
Offer	0	Review details and terms				
Offer	0	Confirm Receipt of offer /documents (txt/email)				
UC	-	Mondays - Weekly update emails				
UC	0	Send Buyer congrats email with ABK CC info				
UC	0	Send Agent congrats email with ABK CC intro				
UC	0	Review all documents for Accuracy				
UC	0	Retrieve missing docs/signatures as req.				
UC	0	Check EMD / DD funds being sent				
UC	0	Complete & Deliver docs to attorney / lender				
UC	0	Order title / Survey as needed				
UC	1	Update Closing timeline				
UC	2	Transaction timeline email				
UC	2	Receive / deliver EMD & DD receipt				
UC	3	Submit docs to brokerage for compliance				

Phase	Day	Activity Description	Progress	Due	Completed	Notes
UC	10	Confirm Appraisal & schedule in ShowingTime				
UC	10	Order/Deliver any req warranties				
UC	20	Verify all Title work is completed				
UC	20	Verify Appraisal has passed				
UC	30	Receive / Deliver lenders Clear to Close				
INS	-	Mondays - Weekly update emails				
INS	1	Order and schedule all required inspections				
INS	1	Send Buyers Inspection Time Email				
INS	5	Receive, Review, and deliver inspection reports				
INS	10	Coordinate docs / signatures as req.				
INS	12	Receive all repair receipts and documentation				
INS	12	Submit all INS docs to brokerage compliance				
PRE C	-	Mondays - Weekly update emails				
PRE C	-20	Coordinate quotes and moving services				
PRE C	-20	Coordinate utility transfers, internet/cable ect				
PRE C	-7	Confirm closing time with agents and attorney				
PRE C	-7	Send final walkthrough & Closing email to Seller				
PRE C	-4	Receive / Review / Distribute CD				
PRE C	-4	Send agents CDA to Attorney/Lender				
PRE C	-4	Order Agents Thank you closing gift				
PRE C	-3	Ensure no addtl amendments are req w/ agents				
POST	0	Confirm Closing and funding				
POST	0	Final Milestone email to Buyers (req feedback)				
POST	0	Congrats /TY email to agents (req feedback)				
POST	0	Prepare any POST closing req. / docs of buyer				
POST	0	Submit Final docs to brokerage compliance				
POST	0	Close out File				