



# Listing Transaction Checklist

Property Address:  
 Client:  
 Closing Date:

UC Date:

Listing Date:  
 Listing Price:  
 Sale Price:

Phase	Day	Activity Description	Progress	Due	Completed	Notes
PRE	-5	Send intro email to client ( pref vendors )				
PRE	-5	Verify client info & check tax records				
PRE	-5	Finalize listing agreement				
PRE	-5	Obtain MLS Data Input info				
PRE	-5	Obtain Sellers LBP & other disclosures				
PRE	-5	Send estimated net to seller w/cost explanation				
PRE	-5	Add sellers to loop, any info you already know				
PRE	-5	Submit docs to brokerage compliance				
PRE	-5	Share docs with sellers				
PRE	-5	Send listing expectations email				
PRE	-5	Schedule Photos / pre listing INS / Repairs				
PRE	-5	Notify Sellers of date/time photos				
PRE	-5	Add all items to calendar				
PRE	<-14	Coming Soon Option Input				
LIVE	-	Mondays - Weekly update emails				
LIVE	0	List Property in MLS				
LIVE	0	Assign LB				
LIVE	0	Update Showing Instructions				
LIVE	0	Upload RPD / Additional Docs				
LIVE	0	Produce Brochures / Pamphlets Option				
LIVE	0	Send live listing email to seller				
LIVE	0	Create Flyer / Social Media Post				
LIVE	0	Schedule any open Houses				
LIVE	0	Review Zillow and <a href="https://www.realtor.com">realtor.com</a> Listing				

Phase	Day	Activity Description	Progress	Due	Completed	Notes
<b>LIVE</b>	1	Execute Listing agree amend as instructed				
<b>LIVE</b>	-	Make MLS Changes as instructed				
<b>UC</b>	-	Mondays - Weekly update emails				
<b>UC</b>	0	Send Seller congrats email with team info				
<b>UC</b>	0	Send Agent congrats email with team info				
<b>UC</b>	0	Change MLS to UC				
<b>UC</b>	0	Review all documents for accuracy				
<b>UC</b>	0	Retrieve missing docs/signatures as required				
<b>UC</b>	0	Complete closing contracts				
<b>UC</b>	0	Order title and deliver closing contracts				
<b>UC</b>	1	Send closing timeline to seller				
<b>UC</b>	2	Order any required inspections, docs, warranties , ect				
<b>UC</b>	3	Confirm receipt of EMD				
<b>UC</b>	3	Submit all files to brokerage				
<b>UC</b>	10	Verify Appraisal has been ordered				
<b>UC</b>	20	Verify appraisal has passed				
<b>UC</b>	20	Verify all title work is complete				
<b>UC</b>	30	Confirm buyers lender clear to close				
<b>INS</b>	-	Mondays - Weekly update emails				
<b>INS</b>	5	Confirm dates/times of INS w/ Buyers agent				
<b>INS</b>	5	Send sellers INS time email				
<b>INS</b>	10	Receive INS reports				
<b>INS</b>	10	Coordinate docs and signatures as req.				
<b>INS</b>	12	Coordinate repair quotes and service				
<b>INS</b>	15	Update all parties on repairs				
<b>INS</b>	17	Receive repair receipts and documentation				
<b>INS</b>	17	Distribute repair receipts / docs to all parties				

Phase	Day	Activity Description	Progress	Due	Completed	Notes
PRE	-	Mondays - Weekly update emails				
PRE	-20	Confirm sellers new address				
PRE	-20	Coordinate quotes and moving services				
PRE	-20	Coordinate utility transfers				
PRE	-7	Confirm closing time w/ agents and title				
PRE	-7	Send final walkthru and closing email to seller				
PRE	-7	Order agents thank you closing gift				
PRE	-4	Receive and distribute CD				
PRE	-4	Send clients CDA to title/attorney				
PRE	-3	Ensure no add. Amend are req. w/ agents				
POST	0	Confirm closing and funding				
POST	0	Final milestone email to seller ( req feedback)				
POST	0	Congrats and thank you email to BA ( req feedback)				
POST	0	Prepare tax letter and any closing req.				
POST	3	Submit final docs to brokerage				
POST	3	Close out file				