

Consultation to Closing Checklist

1. First Contact / Initial Consultation

- ☐ Schedule a buyer consultation (in person or virtual)
 - ☐ Discuss motivation, timing, and desired property type/location
 - ☐ Explain the buyer agency agreement and secure signatures
 - ☐ Review the home-buying process overview
 - ☐ Touch on market conditions and offer competitiveness
- ☐ Provide KW Buyer Packet (process steps, glossary, and tips)
- ☐ Gather and review mortgage pre-approval or proof of funds
- ☐ Set up BrightMLS search and add as contact in Command

2. Property Search & Showings

THE BUYER AGENCY CONTRACT and CONSUMER NOTICE IS A LEGAL REQUIREMENT BEFORE SHOWING HOMES

- ☐ Schedule showings through ShowingTime
- ☐ Provide showing feedback after each visit
- ☐ Track client preferences and refine MLS criteria
- ☐ Discuss market conditions and offer competitiveness
- ☐ Prepare comparative market analysis (CMA) for each serious property (**optional**)
- ☐ Review offer strategy (price range, contingencies, timing)

3. Writing the Offer

- ☐ Confirm buyer's pre-approval or proof of funds is current
- ☐ Review listing documents: SPD, Lead Paint, HOA, etc.
- ☐ Determine offer terms such as price, deposit, settlement date, commitment date and contingencies (mortgage, inspections, appraisal)
- ☐ Draft Agreement of Sale (AOS) in DocuSign
- ☐ Include all required addenda and disclosures
- ☐ The PC Coach Must Review Documents before they are signed by your clients
- ☐ Have buyer review and sign all documents (review with them as necessary)
- ☐ Double-check signatures and initials on all pages
- ☐ Send complete offer package to listing agent with a summary in the email

4. Offer Submission & Negotiation

- ☐ Call listing agent to confirm receipt
- ☐ Highlight offer strengths and buyer flexibility
- ☐ Stay in contact for feedback or counteroffers
- ☐ Review counteroffers with buyer and revise as needed
- ☐ Confirm mutual acceptance and execution date

5. Under Contract / Pending

- ☐ Order Transaction Coordinator (TC) services through [ExploreKw.com](https://www.explorekw.com) -> Agent Services
- ☐ Deliver executed AOS to buyer, lender, and title company
- ☐ Deliver earnest money by deadline and confirm receipt (buyer can deliver)
- ☐ Enter transaction into Command Opportunities

- ☐ Submit paperwork for compliance review
- ☐ Schedule inspections - being mindful of strict deadlines
- ☐ Track all key deadlines (inspection, mortgage, settlement)

6. Inspections & Repairs

- ☐ Schedule home inspection(s)
- ☐ Review inspection report with client
- ☐ Complete Buyers Reply to Inspection document and (if applicable) Change in Terms Addendum
- ☐ Monitor vendor quotes for repairs
- ☐ Track all deadlines carefully

7. Loan & Appraisal Process

- ☐ Lender orders appraisal
- ☐ Track appraisal completion and results
- ☐ Address any appraisal gaps or repairs
- ☐ Ensure mortgage commitment letter is received by deadline in Agreement of Sale
- ☐ Communicate weekly with lender for status updates

8. Title, Insurance & Closing Prep

- ☐ Title company performs title search and provides report
- ☐ Verify homeowner's insurance policy is in place
- ☐ Review Closing Disclosure (CD) with buyer
- ☐ Schedule final walk-through the evening before or the morning before settlement

9. Closing Day

- ☐ Attend final walk-through and confirm property condition
- ☐ Attend closing - bring a closing gift
- ☐ Confirm buyer brings certified funds or wire confirmation
- ☐ Verify all documents signed and keys delivered
- ☐ Celebrate closing (photo, social post, KW follow-up)

10. Post-Closing Follow-Up

- ☐ Follow up a few days to a week with buyer to make sure all went well with moving
- ☐ Update contact in Command SmartPlans (post-close nurture)
- ☐ Ask for Google or KW testimonial
- ☐ Schedule 6-month and 1-year home check-ins
- ☐ Add client to neighborhood updates and market reports