

BUYER MANAGEMENT CHECKLIST

BUYER NAME(S):	
DATE:	

Date Completed	THE APPOINTMENT
	Schedule Buyer presentation
	Have Mortgage Consultant call buyer and attain pre-approval
	Prepare Moxi Presents Buyer presentation (ACE- "Moxi")
	At appointment ,review in the following order 1) Consumer Notice 2) Moxi Buyer Presentation 3) Buyer Agency Contract.
	Give Buyer(s) 10 of your business cards for open houses & referrals.
	Add to Contacts in ACE and Group them.
	Set up Real Scout which is a home search tool (ACE- "Real Scout")
	Set up Buyer Match thru ACE
	Invite buyer to use Your mobile app - Home Snap Pro (If you need help with installing, ACE- "Home Snap")
Date Completed	SHOWINGS
	Utilize Buyer Tour in Moxi for Showings or print MLS sheet
	Set Appointments per instructions on listings.
	Leave business cards and double check all lights are off and property is secure.
Date Completed	OFFER
	Let the listing agent know that you have an interested party and are bringing an offer. Ask if there are any current or incoming offers.
	When you are ready to write an offer, access Zipforms thru ACE to complete your documents (ACE - Zip Forms - New Transaction - Apply your States Buyer Template)
	Make sure buyer has seen sellers disclosure and direct any questions to Listing agent
	Offer package to include executed offer, any addenda,executed Seller Disclosure Statement, pre-approval, deposit check (or copy of check if emailing).
	In a multiple offer situation (or any) consider asking the listing agent for the ability to present your offer in person to the seller.
	Negotiate and have all Agreements fully executed with signatures, dates, and initials and delivered as quickly as possible.
	Once you write an offer and it is executed, start a room in DTR (from your email, click on the 9 small squares at the top right and scroll down). If unfamiliar, reach out to staff (OA's)
Date Completed	PROCESS
	Update details page and transmittal for executed contract
	Watch your dates! For any 2 nd deposit, mtg. application, inspections, etc. So you don't put your buyer(s) in default.
	Mark Transmittal for Trident Land Transfer (hopefully!)
	Mark Transmittal for Trident Insurance to offer a free quote with Buyer's permission. Follow up.
	Review Mortgage commitment and make sure all conditions are met. Clear any conditions which are not customary within 7 days per AOS.
	Review Title Commitment.
	Review CD for accuracy-Make sure all commissions, flat broker fee, warranty (if applicable),etc, are correct. Review Condo/HOA docs (if applicable)
	Schedule Walk thru(s)
	Schedule closing. Have Settlement notice sent.
Date Completed	CLOSING
	Notify all utility companies at least 5 days prior
	Make sure the lender has a copy of homeowners insurance (usually ok to pay on the CD at settlement)
	Make sure Buyer receives Certificate of Occupancy or U&O at settlement if applicable

	Buyers need to bring two types of ID to settlement (ck with title for the list of acceptable ID's)
	Check with city/twp/boro regarding moving permit prior to settlement
	Bring a bank check for balance due at settlement. Check to be made out to the title company. If the buyer is bringing proceeds from a sale of a home, please check with title company (handling this buying) to see if they will accept the check.
	Bring ALTA/CD settlement sheet along if proceeds are being used from prior settlement or lender requires for this purchase.
	Talk to them directly multiple times on fraud and how they should never wire money based on an email not matter how legitimate it may look
	When the transaction is closed, set them up for some sort of stay in touch program like "Property Snapshot" which is accessible thru ACE, and Keep track of Anniversary Date of the Home Purchase ; send "Just Sold" Postcards through Express Docs or Continuity Program. REV 10.28.20

***Almost all tools are accessible via ACE, by typing the tool's name in the search bar.**