

Transaction Checklist - Buy Side

- | | |
|--|--|
| <input type="checkbox"/> Schedule Inspection & put on calendar | <input type="checkbox"/> Submit all documents to compliance |
| <input type="checkbox"/> Put Inspection Period end date on calendar | <input type="checkbox"/> Confirm file is compliant |
| <input type="checkbox"/> Put Closing Date on calendar | <input type="checkbox"/> Create/order commission letter |
| <input type="checkbox"/> Email lender contract & necessary documents | <input type="checkbox"/> Confirm commission letter is correct |
| <input type="checkbox"/> Email title company contract | <input type="checkbox"/> Send commission letter to Title |
| <input type="checkbox"/> Email Buyers breakdown of upcoming events | <input type="checkbox"/> Schedule Walk-thru and Closing |
| <input type="checkbox"/> Confirm Earnest Money has been deposited | <input type="checkbox"/> Place Closing & Walk-thru details on calendar |
| <input type="checkbox"/> Complete Inspection Notice | <input type="checkbox"/> Email closing information to Buyers |
| <input type="checkbox"/> Resolution Needed? | <input type="checkbox"/> Confirm Buyers are Clear to Close |
| <input type="checkbox"/> Request Title Commitment | <input type="checkbox"/> Confirm ALTA statement is accurate |
| <input type="checkbox"/> Is VA/Amendatory Clause needed? | <input type="checkbox"/> Walk-thru complete |
| <input type="checkbox"/> Confirm appraisal status | <input type="checkbox"/> Closing complete |
| <input type="checkbox"/> Ordered | <input type="checkbox"/> Request fully executed settlement statement |
| <input type="checkbox"/> Picked Up | <input type="checkbox"/> Send Best Wishes email to Buyers |
| <input type="checkbox"/> Delivery Date: | <input type="checkbox"/> Close out file in compliance system |
| <input type="checkbox"/> Received | <input type="checkbox"/> Email Co-op agent a Thank you |
| <input type="checkbox"/> Order Home Warranty | <input type="checkbox"/> Confirm commission received |
| <input type="checkbox"/> Email Warranty confirmation to Buyers & Title | <input type="checkbox"/> Update CRM with house closing date |