

Property: \_\_\_\_\_ Sales Price: \_\_\_\_\_

### Transaction Contacts

Buyer: \_\_\_\_\_  
 Phone: \_\_\_\_\_  
 Email: \_\_\_\_\_

Seller: \_\_\_\_\_  
 Phone: \_\_\_\_\_  
 Email: \_\_\_\_\_

Title Company: \_\_\_\_\_  
 Phone: \_\_\_\_\_  
 Email: \_\_\_\_\_

Lender: \_\_\_\_\_  
 Phone: \_\_\_\_\_  
 Email: \_\_\_\_\_

Co-Op Agent: \_\_\_\_\_  
 Phone: \_\_\_\_\_  
 Email: \_\_\_\_\_

TC: \_\_\_\_\_  
 Phone: \_\_\_\_\_  
 Email: \_\_\_\_\_

### Important Milestones

- |  |   |
|--|---|
| <input type="checkbox"/> Earnest Money Amt/Due _____ | <input type="checkbox"/> Option Period Ends _____ |
| <input type="checkbox"/> Option Fee Amt/Due _____    | <input type="checkbox"/> Financing Type/Due _____ |
| <input type="checkbox"/> HOA Docs Due _____          | <input type="checkbox"/> CDA Due _____            |
| <input type="checkbox"/> Survey Due _____            | <input type="checkbox"/> Commitment Due _____     |
| <input type="checkbox"/> Possession Date _____       |   |

### Tasks

- |   |  |
|---|--|
| <input type="checkbox"/> Contract to Title  | <input type="checkbox"/> Commitment Received     |
| <input type="checkbox"/> Contract to Lender | <input type="checkbox"/> HOA Docs Received       |
| <input type="checkbox"/> Contract to Client | <input type="checkbox"/> Repairs Complete        |
| <input type="checkbox"/> Contract to Agent  | <input type="checkbox"/> Receipts to Buyer       |
| <input type="checkbox"/> Checks Delivered   | <input type="checkbox"/> Docs in Broker System   |
| <input type="checkbox"/> MLS Status Changed | <input type="checkbox"/> Docs Approved           |
| <input type="checkbox"/> Appraisal Ordered  | <input type="checkbox"/> CDA Complete            |
| <input type="checkbox"/> Appraisal Received | <input type="checkbox"/> Initial CD Acknowledged |
| <input type="checkbox"/> Survey Ordered     | <input type="checkbox"/> CTC Received            |
| <input type="checkbox"/> Survey Received    | <input type="checkbox"/> CDA Received            |
| <input type="checkbox"/> Survey Approved    | <input type="checkbox"/> Lender Docs Received    |
| <input type="checkbox"/> Warranty Ordered   | <input type="checkbox"/> Closing Scheduled       |

### Notes

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### Schedule Inspections/Walkthroughs

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|--|--|
| <input type="checkbox"/> Home Inspection   Date _____        | <input type="checkbox"/> Roof   Date _____               |
| <input type="checkbox"/> LBP Inspection   Date _____         | <input type="checkbox"/> Re-Inspect   Date _____         |
| <input type="checkbox"/> Termite Inspection   Date _____     | <input type="checkbox"/> Final Walk-through   Date _____ |
| <input type="checkbox"/> Well/Septic Inspection   Date _____ |  |

Executed Date \_\_\_\_\_



Closing Date \_\_\_\_\_