

Buyer Agent Transaction Checklist

Pre-Offer

- Buyer Representation Agreement signed and uploaded
- Buyer's Disclosure signed and uploaded
- Proof of funds or pre-approval letter received
- Provide buyer with estimated net sheet
- Review wire fraud prevention notice with buyer
- Provide home warranty options (if applicable)
- Identify title company to be used

Offer & Negotiation

- Draft and submit offer to listing agent
- Ensure earnest money delivery instructions sent to buyer
- Upload executed purchase agreement to Dotloop
- Upload addenda and disclosures (HOA, CDD, lead-based paint if applicable)
- Update buyer on negotiation progress
- Present counteroffers to buyer and review terms

Under Contract

- Confirm earnest money deposited
- Provide executed contract to lender and title company
- Add lender and inspector to loop
- Schedule inspections (home, pest, etc.)
- Upload inspection reports to loop
- Draft and upload inspection addendum
- Monitor removal of inspection contingency
- Track appraisal order and results
- Monitor loan approval and financing contingency
- Ensure MLS is updated to Pending (if buyer's agent responsibility in your market)

Closing Prep

- Confirm Closing Disclosure (CD) provided to buyer
- Review settlement statement with buyer
- Schedule final walk-through with buyer and listing agent
- Confirm repairs (if any) have been completed
- Coordinate with lender and title company on closing package
- Remind buyer of wire fraud prevention and closing funds instructions

Closing

- Attend or confirm closing appointment with buyer
- Ensure buyer receives keys, garage remotes, and manuals
- Verify closing documents fully executed and uploaded
- Provide buyer with copies of final signed settlement statement
- Close loop in Dotloop