



Sale – "Both sides" Rep. Seller / Unrep. Buyer

You represent the seller and the buyer is being treated as a customer.

Do **NOT** have the buyer sign a buyer’s representation with you.

(This is NOT intermediary)

REQUIRED IN ALL SITUATIONS	IF APPLICABLE
Contract or Purchase Agreement w/ completed receipt page	Third Party Add.
IABS for buyer	Seller Financing Add.
For Your Prot. Get a Home Inspection for buyer	Amendment(s) w/ attachments
General Info & Notice to Buyer	Seller's Disclosure Notice
Representation Disclosure signed by buyer	Info. About Special Flood Hazard Areas
Wire Fraud Warning signed by buyer	Lead-Based Paint
CDA - Commission Disbursement Authorization	Not. to Purch. of Real Prop. in a Water District "MUD"
	Notice of Obl. to Pay Public Improvement District "PID"
Post-Closing Docs:	Add. for Prop. Subject to Mandatory Membership "HOA Addendum"
Buyers Walk-Through Form	Disclosure of Relationship w/ Residential Svc. Co "Home Warranty Disclosure"
Signed Closing Disclosure	Non-Realty Items Add.
Sold MLS Printout (Agent Full) *if app.	Para. #22 Addenda
	Contribution Letter Request
	MLS Printout (OP, P, PSHO)

Effective 6/15/26

Type: SALE

Sale - New Construction

REQUIRED IN ALL SITUATIONS	IF APPLICABLE
Contract or Purchase Agreement	Financing Addendum
IABS for buyer	Info. About Special Flood Hazard Areas
Buyer Representation Agreement	Disclosure of Relationship w/ Residential Svc. Co
Wire Fraud Warning signed by buyer	Commission Agreement
CDA - Commission Disbursement Authorization	Contribution Letter Request
	MLS Printout (OP, P, PSHO)
Post-Closing Docs:	
Buyers Walk-Through Form	
Signed Closing Disclosure	
Sold MLS Printout (Agent Full) *if app.	

Sale - "FSBO" Owner Unrepresented

You represent the buyer and the seller is being treated as a customer.

REQUIRED IN ALL SITUATIONS	IF APPLICABLE
Contract or Purchase Agreement w/ completed receipt page	Notice of Obl. to Pay Public Improvement District
IABS for owner	Add. for Prop. Subject to Mandatory Membership
IABS for buyer	Disclosure of Relationship w/ Residential Svc. Co
Buyer Representation Agreement	Non-Realty Items Add.
Representation Disclosure signed by seller	Para. #22 Addenda
Wire Fraud Warning signed by buyer	Contribution Letter Request
CDA - Commission Disbursement Authorization	MLS Printout (OP, P, PSHO)
	Third Party Add.
Post-Closing Docs:	Seller Financing Add.
Buyers Walk-Through Form	Amendment(s) w/ attachments
Signed Closing Disclosure	Amendment to Buyer Rep. Agr.
Sold MLS Printout (Agent Full) *if app.	Seller's Disclosure Notice
	Info. About Special Flood Hazard Areas
	Lead-Based Paint
	Not. to Purch. of Real Prop. in a Water District

Sale – Rep. Seller or Self / Other Buyer Broker

You represent yourself or the seller and the buyer is represented by another broker.

REQUIRED IN ALL SITUATIONS	IF APPLICABLE
Contract or Purchase Agreement	Third Party Add.
CDA - Commission Disbursement Authorization	Seller Financing Add.
	Amendment(s) w/ attachments
Post-Closing Docs:	Seller's Disclosure Notice
Buyers Walk-Through Form	<i>Info. About Special Flood Hazard Areas (signed by buyer)</i>
Signed Settlement Statement	Lead-Based Paint
Sold MLS Printout (Agent Full) *if app.	Not. to Purch. of Real Prop. in a Water District
	Notice of Obl. to Pay Public Improvement District
	Add. for Prop. Subject to Mandatory Membership
	Disclosure of Relationship w/ Residential Svc. Co
	Non-Realty Items Add.
	Para. #22 Addenda
	MLS Printout (OP, P, PSHO)

Sale – Rep. Buyer or Self / Other Listing Broker

You represent yourself or the buyer and the seller
is represented by another broker.

REQUIRED IN ALL SITUATIONS	IF APPLICABLE
Contract or Purchase Agreement	Third Party Add.
IABS for buyer	Seller Financing Add.
Buyer Rep. Agreement	Amendment(s) w/ attachments
Wire Fraud Warning signed by buyer	Amendment to Buyer Rep. Agr.
CDA - Commission Disbursement Authorization	Seller's Disclosure Notice
	Info. About Special Flood Hazard Areas
Post-Closing Docs:	Lead-Based Paint
Buyers Walk-Through Form	Not. to Purch. of Real Prop. in a Water District
Signed Closing Disclosure	Notice of Obl. to Pay Public Improvement District
Sold MLS Printout (Agent Full) *if app.	Add. for Prop. Subject to Mandatory Membership
<p><u>Are you the buyer?</u> If yes, we DON'T need the following:</p> <ul style="list-style-type: none"> • IABS • Buyer Rep. Agreement. • Disclosure of Relationship w/ Residential Svc. Co. • Wire Fraud Warning • Buyers Walk-Through Form 	Disclosure of Relationship w/ Residential Svc. Co
	Non-Realty Items Add.
	Para. #22 Addenda
	Contribution Letter Request
	MLS Printout (OP, P, PSHO)

Effective 6/15/26

Type: SALE

Sale - Intermediary

Both agents representing the buyer and seller are UTR agents.

Have you spoken to Bill?

REQUIRED IN ALL SITUATIONS	IF APPLICABLE
Contract or Purchase Agreement w/ completed receipt page	Third Party Add.
Intermediary Relationship Notice	Seller Financing Add.
Buyer Representation Agreement	Amendment(s) w/ attachments
IABS for buyer	Amendment to Buyer Rep. Agr.
Wire Fraud Warning signed by buyer	Seller's Disclosure Notice
CDA for Buyer's Agent	Lead-Based Paint
CDA for Seller's Agent	Not. to Purch. of Real Prop. in a Water District
	Notice of Obl. to Pay Public Improvement District
Post-Closing Docs:	Add. for Prop. Subject to Mandatory Membership
Buyers Walk-Through Form	Disclosure of Relationship w/ Residential Svc. Co
Signed Closing Disclosure	Non-Realty Items Add.
Sold MLS Printout (Agent Full) *if app.	Para. #22 Addenda
	Info. About Special Flood Hazard Areas
	Contribution Letter Request
	MLS Printout (OP, P, PSHO)

Skyslope Intermediary File Instructions:

1. From the Checklist tab: Listing agent converts the file in to a transaction by selecting the blue Accepted Contract button.

2. Select a Checklist Type: Sale - Intermediary

3. Add a Co-Listing Agent: Enter in buyer's agent's name.

4. Select a Representation Type: Both Listing & Purchase / Landlord & Tenant

Both agents will have access to the checklist and can upload the necessary documents.

Additional buyer docs to retain in your file.

These do not need to be added to Skyslope.

When representing a buyer:

- Broker Notice to Buyer Tenant HAR 410
 - For Your Protection Get a Home Inspection TXR 1928
 - General Information & Notice to Buyers and Sellers TXR 1506
 - Inspector Information for Buyers TXR 2506
 - Notice of Information From Other Sources TXR 2502
 - Information About Property Insurance for Buyers TXR 2508
 - Information About Special Flood Hazard Areas TXR 1414
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When representing a Seller:

- General Information & Notice to Buyers and Sellers TXR 1506
 - Estimated Net Proceeds
 - CMA
 - Notice of Information From Other Sources TXR 2502
 - Information About Property Insurance for Sellers TXR 2508
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When representing a Landlord:

- Notice of Information From Other Sources TXR 2502
- General Information for Landlord Regarding Assistance Animals TXR 2226

LEASE CHECKLISTS

*= if applicable

Remember all potential intermediary situations need to be approved by Bill first.

Lease - "Both sides" Rep. Owner/ Unrep Tenant

You represent the landlord and the tenant is being treated as a customer. **(This is NOT an intermediary)**

- Lease Agreement
- IABS for tenant
- Lead-Based Paint *
- Addendum Reg. Rental Flood Disclosure
- Pet Agreement*
- Representation Disclosure signed by tenant
- MLS Printout (P) *
- CDA - Commission Disbursement for Leases



Lease - "FSBO" Owner Unrepresented

You represent the tenant and the landlord is being treated as a customer.

- Lease Agreement
- Agr. Between Broker & Owner for Leases
- IABS for tenant
- IABS for owner
- Lead-Based Paint *
- Tenants Representation Agr.*
- Addendum Reg. Rental Flood Disclosure
- Pet Agreement*
- Representation Disclosure signed by owner
- CDA - Commission Disbursement for Leases

Lease - Intermediary

Both agents representing the tenant and landlord are UTR agents.

- Lease Agreement
- Lead-Based Paint *
- Intermediary Relationship Notice
- Pet Agreement*
- IABS for Tenant
- Tenant Representation Disclosure
- Add. Reg. Rental Flood Insurance
- CDA - Commission Disbursement for Leases
- MLS Printout (P)*



Lease - Rep. Owner / Other Tenant Broker

You represent yourself or the landlord and the tenant is represented by another broker.

- Lease Agreement
- Agr. Between Brokers for Leases
- W9 for other Broker
- Lead-Based Paint *
- Addendum Reg. Rental Flood Disclosure
- Pet Agreement*
- MLS Printout (P) *
- CDA - Commission Disbursement for Leases

Lease - Rep. Tenant/ Other Listing Broker

You represent yourself or the tenant and the landlord is represented by another broker.

- Lease Agreement
- Agr. Between Brokers for Leases
- IABS for tenant
- Tenants Representation Agr.*
- Lead-Based Paint *
- Addendum Reg. Rental Flood Disclosure
- Pet Agreement*
- MLS Printout (P) *
- CDA - Commission Disbursement for Leases

Entry Instructions:

From the Checklist tab: Listing agent converts the file in to a transaction by selecting the blue [Accepted Contract](#) button.

Select a [Checklist Type](#): Lease - Intermediary

Add a [Co-Listing Agent](#): Enter in tenant's agent's name.

Select a [Representation Type](#): Both Listing & Purchase / Landlord & Tenant

Both agents will have access to the checklist and can upload the necessary documents.

Additional tenant docs to retain in your file.

(These do not need to be added to Skyslope)

- Broker Notice to Buyer Tenant HAR 410
- General Info. & Notice to Buyers and Sellers TXR 1506
- Mold Remediation Consumer Protection TXR 2507

LISTING Checklists

* = if applicable

Listing for Sell

- Exclusive Right to Sell Listing Agr.
- IABS
- Seller's Disclosure Notice*
- Seller's Disclosure About Groundwater and Surface Water Rights*
- Amendment(s) to Listing*
- HAR 300*
- Sellers Authorization to Disclose and Advertise - TXR 1412*
- MLS Printout (A, Coming Soon)*

Listing for Lease

- Exclusive Right to Lease Listing Agr.
- IABS
- Amendment(s) to Listing*
- HAR 300*
- MLS Printout (A, Coming Soon)*

Listing - Agent/Owner

You are the homeowner.

- MLS Printout (A, Coming Soon)

"Owner Agent" Needs to be in Private remarks, Public remarks and under Disclosures.

COMMERCIAL SALE & LEASE CHECKLISTS

*= if applicable

Remember all potential intermediary situations
need to be approved by Bill first.

**If you do not have experience with commercial transactions,
you need to contact Bill BEFORE entering into a listing or sale.**

NOTE: Sales/leases under a MASTER LISTING FILE should be entered in as separate Transactions in Skyslope.
Do not convert your Listing file into a Transaction if you still have other addresses that are active.

When entering in a Transaction for a MASTER LISTING FILE, select **OTHER** for the Representation Type.
Otherwise Skyslope won't let you proceed.

Commercial - SALE

- Commercial Contract
- IABS for buyer*
- Financing Addendum*
- Commercial Amendment(s)*
- Representation Disclosure*
- Intermediary Relationship Notice*
- Property Condition Statement*
- Lead-Based Paint*
- Water District Notice*
- Wire Fraud*
- CDA - Commission Disbursement Authorization

The following are required if the buyer is
unrepresented OR you represent the buyer.

- IABS for Buyer
- Wire Fraud

Commercial - LEASE

- Commercial Lease Agreement
- IABS for tenant*
- Commercial Lease Exhibit
- Representation Disclosure*
- Intermediary Relationship Notice*
- Copy of Invoice to Owner/Management*
- Agreement Between Brokers for Leases*
- Other Broker W9*
- CDA - Commission Disbursement for Leases

The following are required if the tenant is
unrepresented OR you represent the tenant.

- IABS for Buyer
- Wire Fraud

COMMERCIAL LISTING CHECKLISTS

**MASTER LISTING FILES: Please let Amy know if your listing file will have
multiple addresses to be leased/sold separately.**

Listing for Sell

- Commercial Real Estate Exclusive Right to Sell Listing
- IABS
- Commercial Property Condition Statement*
- Amendment Commercial to Listing*
- Loopnet/CoStar/MLS Printout (A)*

Listing for Lease

- Commercial Real Estate Exclusive Right to Lease Listing
- IABS
- Amendment to Commercial Listing*
- Loopnet/CoStar/MLS Printout (A)*