



### Buyer Checklist

Property Address	
Buyer Name and Number	
Commitment Date	
Closing Date	
Home Inspector Name and Number	
Date and Time of Home Inspection	
Mortgage Company Name and Number	
Closing Attorney Name and Number	
Appraiser Name and Number	
Date and Time of Smoke Certification	

Date	Initials	Completion List (Objectives)
		Make sure buyer is qualified
		Buyer Agent agreement
		Complete Buyer Questionnaire
		Put a search criteria and follow up with the client
		Complete purchase agreement with contingencies
		Complete CMA to verify the price
		Fixtures and Improvements: What is included or not?
		Possession: Do the sellers need occupancy?
		Contingencies: Inspection, Appraisal, and any other
		Seller Concessions: Calculate Net Price
		Make sure to advise buyer of EMD, Proof of Funds, and Mortgage Pre-Approval
		Offer Presentation - Better to present in person
		Follow up with the listing agent to confirm the receipt of the offer
		Send Buyer Letter " Congratulations on Accepted Offer"

		Call Buyer to have them book the Home Inspection
		Verify that the date & time of Home Inspection is acceptable to Listing Agent
		Mark Calendar with date & time of Home Inspection
		Call Lender for updated mortgage approval if needed
		Provide contact information for the title company
		Ask Lender for Appraiser contact information
		Send a group email with listing agent, lender, title company/companies contact info
		Mark board with under agreement information
		Change status in MLS to PEND after inspection contingency is removed
		Set up automatic email for reminder to check title commitment 1 week in advance
		Ask for a weekly update from all parties involved- the lender and the title company
		Check on the CTC from the lender
		Ask the lender to send the loan instructions to the title company
		Review the HUD 1 from the title company
		Set up a closing date and notify all of the closing date
		Schedule an walkthrough inspection either the same day or one day prior to closing

<b>CLOSING</b>		
		Advise Buyer to Transfer Utilities and Change the Locks
		Send Thank You card to buyer with information about the town
		Send Thank You card to seller with (contact info is on HUD)
		Send Thank You card to Listing Agent
		Send Thank You card to Lender
		Send Thank You card to Closing Attorney
		Send Thank You card to Appraiser
		Send Thank You card to office staff members for another smooth deal
		Send Thank You card to home owners insurance company
		Call referral source and notify them about another smooth move
		Send Thank You and Tickets to referral source
		Send Buyer movie tickets (a gift) so they can sit back & relax one week later
		Call Buyer on week anniversary date to make sure no loose ends