



Real Estate Transaction Checklist

Use this handy checklist with your agent to ensure a smooth and successful transaction!

**Pre-Listing • Listing Presentation • Listing Action Plan
Marketing Checklist • Initial Offer Checklist • Under Contract Checklist**

Seller's Information:

Name: _____

Address: _____

Ph: _____ Fax: _____

Email: _____

DATE LISTED: _____ LIST PRICE: \$ _____

Pre-Listing

- 1. Order and Review Property Profile with Assessor's Tax Information
- 2. Note Ownership, Legal Name on Title and Legal Description of Property
- 3. Prepare Market Study
- 4. Enter into Computer Database
- 5. Send Confirmation for Listing Appointment
- 6. Prepare Personal Listing Information Package for Seller
- 7. Deliver Pre-Listing Information Package to Seller
- 8. Call to Confirm Appointment with Seller,
Ask Pre-Appointment Questions
- 9. Present Market Study to Seller, Including Comparable Solds

Listing Presentation

- 10. Present Marketing Plan to Seller
- 11. Discuss Preparation Needed to Market Effectively
- 12. Plan Goals with Seller
- 13. Present Plan of Action to Seller
- 14. Suggest Financial Alternatives
- 15. Seller's Signature on Listing Contract and Addendum

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Listing Action Plan

- 16. Advise Staff of New Listing
- 17. Obtain Owner's House Plans, If Applicable
- 18. Measure Interior Room Sizes
- 19. Measure Exterior Home Dimensions
- 20. Review Lot Size, Land Use and Zoning for Property
- 21. Organize File in Proper Order
- 22. Make Contact Lists for Seller
- 23. Refer Seller to Agent in the Destination City
- 24. Order "Just Listed" Labels for Neighborhood Marketing
- 25. Call Owner to Schedule Caravan or MLS Tour
- 26. Prepare Feedback Fax or Email for Caravan/Tour Participants
- 27. Prepare Property Disclosures
- 28. Prepare Property Data Sheet for Office
- 29. Prepare Showing Instructions and Notify Office
- 30. Obtain Loan Company and Loan Number from Seller
- 31. Verify Current Loan Information with Lender
- 32. Research Loan Pre-Payment Penalties or Loan Assumption Requirements
- 33. Obtain Second Loan Company and Loan Number from Seller
- 34. Verify Second Loan Information with Lender
- 35. Review Most Recent Appraisal, If Available
- 36. Research Local Schools Information
- 37. Contact Homeowner Association Manager
- 38. Research Homeowner Association Fees
- 39. Order Copy of Association Bylaws
- 40. Obtain List of Homeowner Association Services
- 41. Obtain Copy of Complex Layout
- 42. Have Extra Key/Opening Instructions for Lock Box
- 43. Lock Box Installed
- 44. For Sale Sign Installed
- 45. Brochure Box Installed
- 46. Research Utilities/Electric Bills, Water Fees or Rates
- 47. Research Sewer/Septic System
- 48. Confirm Well Status with Well Report (in Specific Areas)
- 49. Determine Well Use as Household or Domestic
- 50. Confirm Well Production
- 51. Research Natural Gas Availability
- 52. Verify Propane Tank Lease Term and Rate
- 53. Obtain Soil Test Results
- 54. Obtain CC&Rs
- 55. Identify Most Significant Features
- 56. Identify All Amenities
- 57. Take Color Photos
- 58. Review and File Power of Attorney
- 59. Research and Note All Pro-Rations
- 60. Verify Rents and Deposits
- 61. Make and File Copy of Leases
- 62. Coordinate Showings with Tenant
- 63. Verify First Right of Refusal
- 64. Note Repairs and Maintenance
- 65. Provide Home Warranty Information



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- 66. Complete Home Warranty Application
- 67. Mail Home Warranty Application
- 68. Receive and File Completed Home Warranty
- 69. Enter New Listing into MLS System

Marketing Checklist

- 70. Add Property to Active Inventory List
- 71. Confirm Owner Has Copy of Listing Agreement
- 72. Proofread MLS Information
- 73. Arrange Home Staging, If Necessary
- 74. Prepare Marketing Flyer
- 75. Deliver Marketing Flyer to Seller for Review
- 76. Deliver Marketing Flyer to Brochure Box
- 77. Distribute Flyer to All Agents in Target Areas
- 78. Mail Flyer to Top 10% of Agents in Area
- 79. Add Property to Website, If Applicable
- 80. Schedule Broker's Caravan/Tour
- 81. Promote Property at Board Of Realtors® Meeting
- 82. Mail "Just Listed" Announcements to Neighborhood
- 83. Plan Print Advertising Campaign
- 84. Write Ads for Newspaper
- 85. Mail Copy of Newspaper Ad to Seller
- 86. Write Ad for Home Magazines
- 87. Mail Copy of Home Magazines to Seller
- 88. Review and File Loan Information
- 89. Update Loan Information in MLS, If Necessary
- 90. Send Feedback Faxes or Email to Agents After Showings
- 91. Review Feedback with Sellers Weekly
- 92. Review Weekly Market Study
- 93. Schedule Regular Calls to Seller to Discuss Marketing and Pricing
- 94. Pre-Qualify All Buyers, When Possible
- 95. Enter Price Change in MLS
- 96. Announce Price Change to All Agents
- 97. Change Price on Flyers
- 98. Deliver New Flyers, as Needed

Initial Offer Checklist

- 99. Offer Received
- 100. Contact Agent to Discuss Buyer's Qualification and Offer
- 101. Review Offer with Seller
- 102. Present All Needed Forms to Complete the Sale

Under Contract Checklist

- 103. Amend, Counter or Accept Offer
- 104. Deliver Signed Offer to Other Agent
- 105. All Parties Sign Contract
- 106. Provide Copy of Contract to Seller
- 107. Provide Copy of Contract to Selling Agent
- 108. Place Copy of Contract in Office File
- 109. Deliver Original Document to Agent
- 110. Notify Escrow of Sale/Open Escrow
- 111. Collect Earnest Money and Deposit in Escrow Account



Real Estate Transaction Checklist

- 112. Deliver Copy of Contract and Addendums to Escrow Officer
- 113. Confer with Seller Regarding Additional Showings
- 114. Discuss Game Plan with Other Agent and Lender
- 115. Fax/Deliver Copy of Contract and Addendums to Lender
- 116. Confirm Purchaser Is Pre-Qualified
- 117. Review Credit Report Results/Review with Seller
- 118. Assist in Arranging Financing
- 119. Track and Receive Preliminary Report or Commitment from Title Company
- 120. Review Preliminary Report or Commitment
- 121. Note Title Insurance Requirements/Discuss with Seller
- 122. Satisfy All Title Insurance Requirements
- 123. Confirm Buyer Receipt of Preliminary Report or Commitment
- 124. Confirm Other Agent Receipt of Preliminary Report or Commitment
- 125. Schedule Appraisal
- 126. Provide Comparable Sales for Appraiser
- 127. Follow up on Appraisal/Appeal for Increase If Appraisal Is Low
- 128. Confirm Verifications of Deposit and Employment Have Been Returned
- 129. Contact Lender Weekly to Track Processing
- 130. Relay Loan Status to Seller
- 131. Confirm Buyer's Hazard Insurance
- 132. Provide Home Warranty for Closing
- 133. Coordinate Home Inspection and Review Home Inspection Results
- 134. Negotiate Payment and Completion of All Required Repairs
- 135. Complete Inspection Requirements
- 136. Order Septic Inspection
- 137. Receive and Review Septic Report
- 138. Deliver Copy of Septic Inspection Report to Lender and Buyer
- 139. File Copy of Septic Inspection
- 140. Order Well Flow Test
- 141. Receive and Review Well Flow Test Report
- 142. Deliver Well Flow Test Report to Lender and Buyer
- 143. File Copy of Well Flow Test Report
- 144. Order Water Quality Test
- 145. Receive and Review Water Quality Test
- 146. Deliver Water Quality Test to Lender and Buyer
- 147. File Copy of Water Test
- 148. Loan Approved
- 149. Confirm Closing Date/Discuss Scheduling with Escrow Officer
- 150. Coordinate the Closing with Seller's Next Purchase
- 151. Schedule Closing Time and Location with Seller
- 152. Discuss Closing Time Schedule with Lender
- 153. Discuss Closing Time Schedule with Other Agent
- 154. Schedule Closing Time with Buyer
- 155. Schedule Final Walk Through for Buyer
- 156. Request Closing Figures from Escrow Officer
- 157. Receive and Review Closing Figures
- 158. Request Closing Documents
- 159. Add Seller to "Past Client" Marketing Program
- 160. Ask Seller for Referrals

