

Transaction

Closing Date: _____

Due Diligence Deadline: _____

[**Bold:** Attorney needs to know]

[*Italic: Transaction Coordinator responsibilities*]

Bold Underline Italic: Time is of the essence deadline

- Contract Signed by both parties Yes Date [effective date of contract]:
- Receipt of Earnest Money sent/received: Date:
- Change status in MLS Yes Date:
- If my buyer – waiver signed and in file

Home Inspection

Radon

Survey

Lead-based Paint

Other

Realtor's initial completion of this form: [date] _____
Assistant's initial tasks complete: [date] _____
Realtor's final tasks complete and this form plus HUD
handed to assistant: [date] _____
Assistant's final tasks complete on this form and file
closed: [date] _____

- Obtain POA Documents:

Owners Association Addendum

Restrictions / Declarations

P & L / Financial

Rules and regulations

Date given to buyer:

If buyers' agent:

Confirm no assessments and that POA addendum is correct and complete

Confirm perk for the home

Measure the home

Confirm other MLS info

- Deadlines* entered into Outlook calendar [include Coe service mailings/calls] Date:

- Copies** of contract to: [faxed/originals]

Sellers

Buyers

Sellers attorney

Buyer's attorney

Buyer's lender [Within one day of contract effective date]

- Attorney
 - For buyer
 - For seller

Attorney information sheet submitted: date _____

- Earnest money

Amount

Which trust account?

Contingencies:

- **Due Diligence deadline:**
- loan commitment deadline
- home inspection
- survey
- loan
- pest
- radon
-
-

⇒ Home Inspection: Deadline:

Who is the Inspector?

Date Inspector hired

What is inspection date

How will they enter premise

Are water and electric on?

If I am Buyer's agent? – Will I meet with them?

Are they doing:

○ Pest yes / no

○ Radon yes / no

Follow up- When will they pick up results?

○ Other

Copies to:

Buyer

Seller

Follow up inspection?

Results:

Date Received:

○ Residence

○ Pest

○ Radon

○

Repairs?

Repair request?

Sent to selling agent date

Received answer from selling agent

How handle the repair credit? Lower price? Seller contribute to closing costs?

⇒ Survey: Deadline:

Who is paying for the survey?

Who is the surveyor?

When hired?

When is the completion date?

Date of actual completion?

Who needs to approve it?

⇒ Loan Commitment letter

- Who is the lender:

Contact info

Date Loan Commitment letter received

Date sent to seller realtor

⇒ Loan approval:

Who is the appraiser?

Copy of contract to the appraiser

Date of the appraisal

Result of the appraisal

Deadline

Date of approval

Date deposited

Day of effective date:

- Prepare the file*
- Prepare Date Calendar and mail/deliver to buyer*
- Phone buyer/introduce self/confirm best means to contact [voice mail/email/other]*
- Will buyer come to closing?***
- Will seller come to closing?***

Day after effective date:

- Attorney information sheet to attorney*
- Send Q&A on home inspections to buyers. Hand write reminder they need to inform the inspector which inspections they want [radon, water, etc]*

- Send Q&A on earnest money*

One week after contract acceptance:

- Send turbulence letter*
- Send Q&A on condos/associations/other pamphlets relevant to this sale*

Two weeks after contract acceptance:

- Send moving checklist*

Two weeks before closing:

- Order Pens or other closing gift*
- Review contract and closing checklist to ensure all is done
- Call buyers/sellers and let them know we'll change utilities in the several days before closing

One week before closing:

- Call buyer/seller and find out how can help. Call every day; let them know you will be. Remind them of attorney location; give directions. Offer to mail change of address to their Christmas list.
- Inform buyers they need to bring a certified check. Wiring info, if relevant
- Contact POA inform them of changes*
- Change utilities*
 - Phone*
 - Electric*
 - Gas*
 - Cable*
 - Other*
- We're moving/our new home cards/mailing labels.*
- Remove staging materials

Do we have HUD?

- **Inspection cost on it?**
- **Survey cost on it?**
- **Pest cost on it?**
- **Radon repair on it?**
- **Repair credit on it?**
- **Commission amount correct?**
- **Perorations correct? ___ POA ___ County Taxes ___ City Taxes ___**