

# BUYER TRANSACTION CHECKLIST

DO LIST

REFERRAL SOURCE \_\_\_\_\_ TYN \_\_\_\_\_ WEBSITE \_\_\_\_\_ INFO \_\_\_\_\_  
INTERVIEW FORMS \_\_\_\_\_ SET APPOINT \_\_\_\_\_ INFO DOC \_\_\_\_\_  
MODELS \_\_\_\_\_ AGENCY ART \_\_\_\_\_ COMP \_\_\_\_\_ RIGHT HS \_\_\_\_\_  
HIRE? \_\_\_\_\_ BB FORMS > \_\_\_\_\_ BB FORMS SIGNED \_\_\_\_\_  
SEARCH PHASE \_\_\_\_\_ LOAN APP \_\_\_\_\_ SAVED SEARCHES \_\_\_\_\_  
SHOW % ACT/UC \_\_\_\_\_ ASK HMS C \_\_\_\_\_ OVER VIEW TOUR \_\_\_\_\_  
SS'S \_\_\_\_\_ FORECLOSURE \_\_\_\_\_ DISCUSSION CHK LIST \_\_\_\_\_  
REVIEW PROCESS \_\_\_\_\_ REVIEW CONTRACT \_\_\_\_\_ RATES SET \_\_\_\_\_  
LOAN APPROVAL \_\_\_\_\_ CONDITIONS? \_\_\_\_\_ L- LTR \_\_\_\_\_  
OTHER \_\_\_\_\_

## WRITE CONTRACT

CHOOSE HS \_\_\_\_\_ LISTER?'S \_\_\_\_\_ CMA \_\_\_\_\_ BUYERS RT HS \_\_\_\_\_  
ASK TERMS \_\_\_\_\_ SEND DRAFT \_\_\_\_\_ HMS? \_\_\_\_\_  
OTHER \_\_\_\_\_

## CONTRACT RATIFIED

RECORD CONTACTS \_\_\_\_\_ COPY CHK \_\_\_\_\_ MAIL \_\_\_\_\_

## PROCESS CONTRACT

REMAX \_\_\_\_\_ CLIENT \_\_\_\_\_  
ATTORNEY \_\_\_\_\_ LENDER \_\_\_\_\_  
TIME LINE/CHECK LIST \_\_\_\_\_ SCHED CLOSE DATE/TIME \_\_\_\_\_  
AUTHORIZE- HI/RADON/TERMITE \_\_\_\_\_ SHED- HI \_\_\_\_\_ RADON \_\_\_\_\_  
HI REPORT \_\_\_\_\_ HI ADD \_\_\_\_\_ RADON ADD \_\_\_\_\_  
HI ADD RAT'D \_\_\_\_\_ RADON ADD RAT'D \_\_\_\_\_ RECEIPTS \_\_\_\_\_  
TERMITE B \_ S \_ ORDERED \_\_\_\_\_ RESULTS \_\_\_\_\_ TREAT \_\_\_\_\_  
HOA DOC DELIVER \_\_\_\_\_ ACK FORM \_\_\_\_\_ X DATE? \_\_\_\_\_  
ARB NOTICE \_\_\_\_\_ COMPLIANCE LTR? \_\_\_\_\_  
APPRAISAL DONE? \_\_\_\_\_ RESULTS? \_\_\_\_\_ REMOVE CNTG \_\_\_\_\_  
FORM 100 \_\_\_\_\_ COMMIT LETTER \_\_\_\_\_ REMOVE FIN CNTG \_\_\_\_\_  
HO INS \_\_\_\_\_ UTIL'S DOC \_\_\_\_\_ TRANS UTIL'S \_\_\_\_\_  
OTHER \_\_\_\_\_

## CLOSING PHASE

CLOSE/WALK TIME/DATE \_\_\_\_\_ FINAL CHECK LIST \_\_\_\_\_  
DRAFT HUD \_\_\_\_\_ \$ CERT/WIRE \_\_\_\_\_ FINAL WALK \_\_\_\_\_  
WALK FORM-LISTER \_\_\_\_\_ SIGN/LB PICK UP \_\_\_\_\_ CLOSE PIC \_\_\_\_\_  
REFERENCE LTR \_\_\_\_\_ ADD WEBSITE \_\_\_\_\_

RENT BACK? \_\_\_\_\_ TERM DATE? \_\_\_\_\_ FINAL WALK \_\_\_\_\_  
RELEASE DEPOSIT \_\_\_\_\_ PUT ON MAILING LIST \_\_\_\_\_ **12/2/16**