

Pending Sale Checklist

Date Opened: _____

Client: _____

MLS# _____

Est Close Date: _____

Property Address:

Actual Close:

Req'd	Closing File Items	Buyer Req'd/Rec'd	Seller Req'd/Rec'd	B. Agent Req'd/Rec'd	L. Agent Req'd/Rec'd	Complete	Audited
	Coordinator Welcome Call						
E	Change status in MLS to PS (if our listing)						
E	Input All Parties in AllClients and create DEAL						
E	Create Dropbox Folder						
E	MLS Printout in File: Active, Pending & Sold	A:	P:	S:			
E	Printout Tax Record						
E	Escrow Opened	Escrow #					
E	Home Warranty Ordered	Confirmation #					
E	Copy of Deposit Check						
E	EMD Receipt						
E	Proof of Funds Received						
E	Send NHD Bill to Escrow						
E	Broker Demand to Title						
E	Prelims received & reviewed						
E	Prelim receipt received						
E	Lender Prequal Letter						
E	Short Sale Approval						
E	Est. Buyer/Seller Net Sheet						
E	Is there an HOA						
E	Are there CC&Rs						
E	Client Survey to Escrow at Signing						
E	Confirm Buyer ordered home owner's insurance						

Contracts-If Verify fully executed contracts, all counters and addendums need to be sent to the lender

C	Completed Contract	/	/	/	/		
C	Counter Offers	/	/				
C	Pest Addendum	/	/				
C	Addendums	/	/				
C	Request For Repairs	/	/				
C	Response to Request for Repairs						
C	Contingency Removal	/	/				

Disclosures- If our seller we send the disclosures to the selling agent. If our buyer we request the Disclosures from the listing agent.

	Year Home Built				
D	Agency Disclosure-Buyer/Selling Agent	/	/	/	/
D	Agency Disclosure-Seller/Listing Agent				
D	AVID-Listing Agent				
D	AVID-Selling Agent	/	/		
D	Buyers Inspection Advisory				
D	Carbon Monoxide				
D	FHA/VA Ammendatory Clause				
D	FIRPTA				
D	For Your Protection get a Home Inspection	/	/		
D	Lead Based Paint (Pre 1978)	/	/	/	/
D	Market Conditions Advisory	/	/		
D	Natural Haz. Disclosure	/	/	/	/
D	Natural Haz. Report	Ordered:	/	Received:	
D	Possible Rep of more than one buyer/seller				
D	REO Advisory	/	/		
D	Seller Property Questionnaire	/	/		
D	Statewide Buyer/Seller Advisory	/	/		
D	Supplemental Tax Bill				
D	Transfer Disclosure	/	/	/	/
D	Water Heater/Smoke Detector	/	/		

Inspections-If our seller we order all inspections. If our buyer we request inspection from listing agent

I	Appraisal Completed		Any Conditions?			
I	Home Inspection Ordered	Date of Insp:				
I	Home Insp. Report or Waiver					
I	Roof Certification					
I	Septic Inspection Report	Date of Insp:				
I	Well Inspection Report	Date of Insp:				
I	Pest Inspection Ordered	Date of Insp:				
I	Pest Report Recd	Repairs by:				
I	Pest Clearance	Re-Insp Date:				
I	Verification of Property Condition-Walk Thru	Date:				

After Close Checklist

	Update MLS (if our listing)					
	Update All Clients with New Address's					
	Sign removed (if our listing)					
	LockBox Removed					
	Verify Utilities Off					
	Lock Box returned (if our listing)					
	Tracker Form Turned in for Compliance					
	Closing Audit Sheet Complete					
	PDF All Emails					
	Annual Review					
	Special Event - Home Purchase Anniversary Add					
	Request Zillow Review					

Sign and date each item as it is completed! Only mark **complete** when all signatures are **complete**! Anything sent out to clients for their signature should be highlighted with the following colors as well as same color sticky's to point out necessary signature.

marked "Client Copy" for the client!

Buyer	Yellow	Buying Agent	Pink	C-Contract Tab
Seller	Green	Selling Agent	Orange	D-Disclosure Tab
				I-Inspections Tab
				E-Escrow Tab

