

BUYER'S AGENT

PROPERTY:	MLS#:	AGENT:
CLOSING DATE:	TIME:	LOCATION:

INITIAL DOCUMENTATION

☐ AOS ☐ Check ☐ SPD ☐ PreQual/POF ☐ SEC ☐ Wire Notice ☐ HW
☐ Deed ☐ Referral Form ☐ RLBPHD ☐ FYP Form ☐ WN ☐ DMN ☐ CN
☐ KPSS ABA Form

KW Addendum signed: ☐ Buyer ☐ Seller ☐ Agent

CONTRACT PROCESSING

☐ File started ☐ Submitted Contract Folder ☐ Approved ☐ Comm Submitted
☐ Pending Checklist ☐ Date on Calendar ☐ Tasks set
AOS Copy to: ☐ Client ☐ Bank ☐ Attorney
☐ Introduction email sent to Buyer

DEPOSITS & MORTGAGE

EMD Due: _____ Amount: _____
Follow up on: ☐ Deposit ☐ Mortgage Application ☐ Appraisal
☐ 1st Deposit received ☐ 2nd Deposit received

INSPECTIONS & REPORTS

☐ Home Inspection Scheduled ☐ House & Septic Ready
Inspection Types: ☐ General ☐ Termite ☐ Radon ☐ Water ☐ Septic
Inspection Date: _____ Inspector: _____
☐ Inspection Reports received ☐ sent to Client
☐ Sent Rerminder ☐ BRTI Prepared ☐ Sent
☐ CIT Addendum Prepared ☐ Sent ☐ Fully Signed

RESALE CERT * C/O

Resale Certificate Received: ☐ Copy sent to Buyer ☐ Title Co
☐ Receipt of Documents sent ☐ Receipt of Documents signed
C/O Received: ☐ Copy sent to Buyer

APPRAISAL & MORTGAGE

Mortgage Type: _____
Appraisal: ☐ Ordered ☐ Scheduled ☐ Value OK?
Repairs: ☐ Repairs Needed ☐ No Repairs Needed
Mortgage Commitment Due: _____ ☐ Requested ☐ Received

WARRANTY, REPAIRS, & UTILITY INFO

☐ Utility Info Requested ☐ Utility Info Received ☐ Sent
Warranty: ☐ Yes ☐ No ☐ Ordered ☐ Invoice sent to Title Company
BRTI repairs: ☐ Repairs finished ☐ request receipts
☐ Receipts received and sent to Buyer

CLOSING DATE TRACKING

Closing Date: _____ ☐ Confirmed
☐ All Parties Notified ☐ Extension Signed ☐ Calendar Updated
Closing Time Preferred: _____

COMMISSION DETAILS

Buyer's Agent %: _____

Buyer Paid Commission: _____ Seller Paid Commission: _____

BUYER

NAME: _____
ADDRESS: _____
PHONE: _____
EMAIL: _____

ATTORNEY

NAME: _____
CONTACT: _____

SELLER

NAME: _____
ADDRESS: _____
PHONE: _____
EMAIL: _____

LISTING AGENT

NAME: _____
PHONE: _____
EMAIL: _____

TITLE AGENT

NAME: _____
PHONE: _____
EMAIL: _____
☐ Title Ordered ☐ TC Invoice sent Date Ordered: _____

HOA

NAME: _____
CONTACT: _____
Resale Certificate Received ☐
NOTES: _____

C/O ☐ Received

NOTES: _____

LENDER INFORMATION

NAME: _____
PHONE: _____
EMAIL: _____

REFERRAL INFORMATION ☐ Yes ☐ No

DUE TO: _____ %

NOTES

QUICK REFERENCE

CONTRACT DATE: _____
ACCEPTANCE DATE: _____
PRICE: _____
SELLER'S ASSIST: _____