

# BUYER CLOSING CHECKLIST

Property Address: \_\_\_\_\_

Days After Acceptance	Date Completed	Description	Requested	Received
0		Upload signed contract, forms & contact info to property file		
0		Calendar all key contract dates & deadlines - see below		
1		Email signed contract & contact info to lender, title & sellers agent		
1		Email signed contract to buyer w/ title contact info & next steps		
1		Call buyer with next steps, key dates/deadlines & inspection info		
1		Email seller's agent - all utilities to be left on for inspections		
1		EMD-Earnest Money Deposit delivered		
1		Submit all documents/forms to broker compliance		
1		Update Team Scoreboard		
1		Contact lender to order appraisal		
1		Listing agent "congratulations" call to buyer - ask for referrals		
1		Order all buyer-required inspections - see inspection checklist below		
2		Friend request to buyers on Facebook & social media		
2		Save MLS listing detail as PDF & upload to property file		
2		Request Preliminary Title Report		
2		Send/Request disclosures to/from seller's agent		
2		Obtain/Order neighborhood contact information for mailers/calls		
2		"Sale Pending" mailer/flyers to neighborhood ordered		
2		"Sale Pending" Facebook & social media posts		
3		Start agent circle prospecting "sale pending" calls/door knocking		
3		Submit commission disbursement/disbursement authorization		
3		Contact lender to ensure all buyer docs recvd (tax info, pay stubs, etc)		
4		Appraisal scheduled? Contact lender.		
5		Contact buyers re: help w/ home insurance? (preferred vendors)		
7		Call buyer with update - what's been done & next steps		
12		All inspections conducted & reports received (see list below)		
12		Email inspection reports to buyer & call to go over them		
13		Draft Request for Repairs form		
14		Send Request for Repairs form to seller's agent		
14		Call to check loan status with lender. Still needed from buyer?		
14		Call buyer with update - what's been done & next steps		
15		Appraisal In? Contact Lender		
17		Agent call buyer to congratulate on property appraising		
17		Contact lender - Underwriter approval before loan contingency date		
19		All other inspection reports received? See below		
19		Receive seller's counter to buyer request for repairs?		
20		Get clients new address & update SOI database in CRM		
21		Call buyer with update - what's been done & next steps		
22		Contact lender - Any underwriting conditions? Loan docs when?		
23		Are all contingencies of the sale removed? Still needed?		



5 Days Before Closing				
25		Call buyer 5 days before closing to explain closing process		
25		Schedule buyer's final walkthrough inspection		
25		Request & review estimated closing statement		
25		Submit any final invoices to escrow/title/attorney		
25		Loan Documents in? Schedule buyers to sign & funds to bring		
25		File Housekeeping - contact other agent to ensure file is complete		
25		Order closing gift for buyers		
25		Contact seller's agent to get utilities list		
26		Loan documents signed & sent to lender for loan funding?		
26		Send utilities list to buyers to switch names at close date		
27		Contact escrow/title/attorney - Still needed to close (buyer funds up?)		
28		Buyer final walkthrough inspection conducted?		
28		Loan Funded? Has escrow/title/attorney received funds to close?		
29		Email seller's agent to coordinate keys & garage door controllers		
29		Email seller's agent to ensure proper MLS credit for buyer-side		
29		Request & review final estimated closing statement		
Day of Closing				
30		Confirm Recording		
30		Keys & garage door controllers received by buyers		
30		Agent to call buyer w/ "congratulations" - ask for referrals		
30		Receive closing documents from escrow/title/attorney (upload to file)		
30		Email closing documents w/ congratulations email to buyers		
30		Check MLS listing to ensure buyer-side credit for sale		
31		Commission check(s) received/deposited		
After Closing				
31		Input "adopted" seller contact information into CRM database		
31		Update new buyer notes in SOI database w/ new address		
31		Start buyer on past client email/mailed drip campaign		
31		Send buyer congratulations letter w/ closing statement for taxes		
31		Send buyer congratulations email w/ online review request links		
31		Send adopted seller congratulations letter		
31		Send "Thank You Colleague" letter to co-op agent		
31		Send "Thank You" letter to lender		
31		Update closing on team scoreboard		
32		Calendar Home Anniversary & 30/90 day agent calls (referrals)		
32		Create/save PDFs of all file documents & emails		
32		Start agent "Just Sold" calls to neighborhood		
32		"Just Sold" mailers/flyers to neighborhood & SOI		
32		"Just Sold" - FB & other social media posts		
32		SOLD By sign in yard for 2 weeks		



## Key Contract Dates & Deadlines

Description	Dates
7th Day - Disclosures Delivered	
7th Day - Preliminary Report Received	
17th Day - Inspection Repairs Request Deadline	
17th Day - Appraisal Contingency Removal Deadline	
21st Day - Loan Contingency Removal Deadline	
5 days till close - walkthrough, funding, etc.	
Other:	
Other:	
Closing Date	

## Inspection Information Checklist

Type	Company & Contact Info	Date & Time	Report Received ?
Termite/Pest			
Home Inspection			
Pool Inspection			
Roof Inspection			
Septic Inspection			
Appraisal			
Well Inspection			
Flood Zone Insp.			
Other Inspection			