

Broker Final Transaction Closing

Checklist

Required Document Turn In

- ☐ Turn final transaction documents into the firm
 - See full list below

Celebrate the Event

- ☐ Post the closing on social
- ☐ Send a thank you to the referral source if applicable
- ☐ Send thank yous (cards or emails) to all parties involved in the transaction
 - Lender
 - Title Team
 - Escrow Team
 - Buyer Broker
 - Specialists and vendors

Follow-Up

- ☐ Schedule seller post-closing follow up strategies in your calendar

Complete List of Required Summit Transaction Documents	
Before Mutual	After Mutual
<ul style="list-style-type: none"><input type="checkbox"/> Listing Agreement Form 1A<input type="checkbox"/> Brokerage Information and Disclosure Packet<input type="checkbox"/> Form 1 Listing Input Sheet<input type="checkbox"/> Form 22E FIRPTA<input type="checkbox"/> Form 22J Lead Paint (if applicable)<input type="checkbox"/> Form 22K Utilities<input type="checkbox"/> Form 17 Seller Disclosure<input type="checkbox"/> WRE Form 42 Seller Procured Inspection (if applicable)<input type="checkbox"/> Legal Description<input type="checkbox"/> Preliminary Title<input type="checkbox"/> Seller Procured Inspection (if applicable)<input type="checkbox"/> Marketing Materials<input type="checkbox"/> CMA/Opinions of Value	<ul style="list-style-type: none"><input type="checkbox"/> Purchase and Sale Agreement with all Addenda<input type="checkbox"/> Lender Pre Approval Letter<input type="checkbox"/> Unaccepted Offers<input type="checkbox"/> Seller Transaction Summary<input type="checkbox"/> Earnest Money Receipt<input type="checkbox"/> Inspection Response (Form 35R if applicable)<input type="checkbox"/> Title Commitment<input type="checkbox"/> Compensation Disbursement (Form 40)<input type="checkbox"/> Title Supplements Issued (if any)<input type="checkbox"/> Other Mutually Accepted/Signed Documents<input type="checkbox"/> Final Settlement Statement<input type="checkbox"/> Material Correspondence