

# Contract to Closing

## Checklist

Mutual Acceptance (First 12 – 24 hours)	3 Weeks to Closing
<ul style="list-style-type: none"> <li><input type="checkbox"/> Send mutual purchase and sale contract to the buyer's lender (<i>Lender Mutual Contract Email</i>)</li> <li><input type="checkbox"/> Send buyers the <i>Buyer Congratulations Email</i></li> <li><input type="checkbox"/> Turn purchase and sale agreement and lender pre approval letter into firm</li> <li><input type="checkbox"/> Book a home inspector/specialist and confirm time with listing broker (if applicable)</li> <li><input type="checkbox"/> Prepare the <i>Buyer Transaction Summary</i> (external document) and obtain manager approval</li> <li><input type="checkbox"/> Send buyers the <i>Transaction Summary Email</i></li> <li><input type="checkbox"/> Prepare the <i>Buyer Transaction Summary</i> and supporting disclosures for buyer signatures in Authentisign</li> <li><input type="checkbox"/> Enter transaction deadlines and due dates into your calendar</li> <li><input type="checkbox"/> Post on social media</li> <li><input type="checkbox"/> Submit additional documents to the firm: <ul style="list-style-type: none"> <li>○ Seller FIRPTA (Form 22E)</li> <li>○ Seller Procured Inspection</li> <li>○ Unaccepted offers made by buyer</li> <li>○ Brokerage Information and Disclosure Packet</li> <li>○ Buyer Brokerage Services Agreement</li> </ul> </li> <li><input type="checkbox"/> Begin gathering Material Correspondence</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Send buyer the <i>Understanding Your Home Appraisal Email</i></li> <li><input type="checkbox"/> Check in with buyer's lender on the status of the home appraisal</li> <li><input type="checkbox"/> Check in with the buyer</li> <li><input type="checkbox"/> Check in with listing agent</li> <li><input type="checkbox"/> Submit Title Commitment to firm</li> </ul>
	2 Weeks to Closing
<b>4 Weeks to Closing</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Send manager prepared Commission Disbursement Form (Form 40) to escrow</li> <li><input type="checkbox"/> Send buyer the <i>Understanding the Home Inspection Email</i></li> <li><input type="checkbox"/> Conduct any agreed upon inspections</li> <li><input type="checkbox"/> Staple "Sold By" strip to listing yard arm after contingencies are met</li> <li><input type="checkbox"/> Prepare Appraisal Notes using the <i>Home Appraisal Notes Template</i></li> <li><input type="checkbox"/> Prepare Inspection Response Form 35R if applicable and review with manager</li> <li><input type="checkbox"/> Submit Earnest Money Receipt to the firm</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Send buyer the <i>Preparing for Closing Email</i></li> <li><input type="checkbox"/> Check in with buyer's lender on the status of underwriting</li> <li><input type="checkbox"/> Check in with the buyer</li> <li><input type="checkbox"/> Check in with listing agent</li> <li><input type="checkbox"/> Schedule buyer's final walkthrough</li> </ul>
	1 Week to Closing
	<ul style="list-style-type: none"> <li><input type="checkbox"/> Send the buyer the <i>Final Property Walkthrough Email</i></li> <li><input type="checkbox"/> Check in with buyer's lender on the status of final loan approval and the buyer's Closing Disclosure (CD)</li> <li><input type="checkbox"/> Check in with the buyer</li> <li><input type="checkbox"/> Check in with listing agent</li> <li><input type="checkbox"/> Conduct final walkthrough</li> <li><input type="checkbox"/> Alert escrow of the buyer's ideal day and time for signing closing documents</li> <li><input type="checkbox"/> Purchase the buyer's closing gift</li> </ul>
	Week of Closing
	<ul style="list-style-type: none"> <li><input type="checkbox"/> Send buyer the <i>What to Expect on Closing Day Email</i></li> <li><input type="checkbox"/> Coordinate key exchange with the listing broker</li> <li><input type="checkbox"/> Confirm loan documents are at escrow</li> <li><input type="checkbox"/> Ensure buyer has a signing appointment</li> </ul>
	Closing Day
	<ul style="list-style-type: none"> <li><input type="checkbox"/> Keep buyer updated on funding and recording</li> <li><input type="checkbox"/> Meet buyer for keys (generally after 5pm)</li> </ul>