

Seller Checklists

Pre Listing Checklist

Done	Task	Due Date	Assigned To
	Schedule Listing Appointment with seller		
	Research all comparable listed properties		
	Research recent sales activity		
	Research “average days on market” for similar properties		
	Research using coding, deed restrictions and zoning		
	Prepare comparable market analysis		
	Prepare listing presentation package		
	Perform exterior “curb appeal assessment” of property		
	Confirm appointment with seller (1 day prior to listing apt.)		

New Listing Checklist

Done	Task	Due Date	Assigned To
	Confirm square footage, lot size & title info		
	Obtain current mortgage loan(s) info		
	Data Entry (listing checklist)		
	Turn file into office		
	Order sign/keybox		
	Place orders (preliminary title report, etc.)		
	Enter property in MLS		
	New Listing Marketing		
	Prepare showing instructions		

Under-Contract Checklist

Done	Task	Due Date	Assigned To
	Listing under contract data entry		
	Turn in file to office		
	Place orders (title, home warranty)		
	Home inspection		
	Appraisal		
	Follow-up on buyer loan		
	Clear all due diligence items		
	Weekly followup call to seller		

Pre-Closing Checklist

Done	Task	Due Date	Assigned To
	Prepare seller for utility transfer		
	Verify settlement statement & closing details, notify client		
	Make sure the contract is signed by all parties		
	Update closing forms and files		
	Schedule closing with seller & title		
	Schedule final walkthrough with buyer's agent		
	Call seller on closing		

Listing Sold Checklist

Done	Task	Due Date	Assigned To
	Update buyer address (data entry)		
	Send customer satisfaction survey		
	Process final file/commissions		
	Update websites/advertising		
	Inform parties of changes		
	Remove sign & keybox		
	Verify/change MLS status		

Buyer Checklists

New Buyer Under Contract Checklist

Done	Task	Due Date	Assigned To
	Verify the default due dates/deadlines		
	Enter all related parties in CRM		
	Process earnest money		
	Turn in file to office (ensure file is completed)		
	Place Orders (title, home inspection, lender appraisal, etc.)		
	Complete seller disclosures		
	Verify loan status (provide contract to lender, verify appraisal when ready)		
	Clear due diligence contingency		
	Follow-up on loan		
	Follow-up on orders (home warranty, etc. If needed)		

Buyer Pre-Closing Checklist

Done	Task	Due Date	Assigned To
	Verify all items in file are complete.		
	Review settlement statements, call buyer with amount due		
	Call to set-up closing with seller, title & buyer		
	Prepare to send closing gift (determine gift)		
	Provide buyer with utility information		

Buyer Closed/Sold Checklist

Done	Task	Due Date	Assigned To
	Data entry (update buyer address)		
	Send closing gift		
	Update address under contact record		
	Update affiliates and verify commissions in opportunity		
	Send customer satisfaction survey		