

Buyer-Under-Contract Checklist

*This checklist can be used in paper form, or input into your contact management system. Refer to **Sell with Soul** for more details on each item. As contract-to-closing protocol varies significantly by market area, be sure to confirm the accuracy and appropriateness of each item in your jurisdiction.*

Activity	Due Date	√ When Complete
Enter contract dates into contact management program	Day of Contract	
Fax contract to lender	Day of Contract	
Deliver property disclosures to buyer	Day of Contract	
Deliver earnest money to listing agent	Day of Contract	
Give buyer HOA contact information & questionnaire	Day of Contract	
Give buyer inspector names & numbers	Day of Contract	
Call buyer's lender to confirm loan application	1st Week after Contract	
Call buyer's lender to discuss scheduling appraisal	1st Week after Contract	
Deliver signed disclosures to listing agent	1st Week after Contract	
Tell buyer to look into homeowner hazard insurance	1st Week after Contract	
Call buyer's lender to check in	1st Week after Contract	
Has closing been scheduled?	1st Week after Contract	
Is buyer doing a mail-out close or POA?	2nd Week after Contract	
Are the inspection items done?	1 Week before Closing	
Get documentation of inspection repairs	1 Week before Closing	
Schedule walk-thru	1 Week before Closing	
Remind buyer to transfer utilities	1 Week before Closing	
Send any changes to lender and/or title company	2-4 Days before Closing	
Confirm closing time & place	2-4 Days before Closing	
Review closing figures with buyer	2-4 Days before Closing	
Tell buyer to bring driver's license & cashier's check to closing	2-4 Days before Closing	
Prepare the file for closing	Right before Closing	
Turn the file in to the office manager	Right after Closing	
Add buyer to your SOI (or change buyer's address)	Right after Closing	
Add buyer to your post-closing follow-up program	Right after Closing	
Call buyer to check on move	4 Days after Closing	