

1. Name the Players in the Transaction

Create a spreadsheet with contact information for all parties involved in the transaction:

ROLE	NAME(S)	PHONE NUMBER	EMAIL ADDRESS	MAILING ADDRESS
Buyer(s)				
Seller(s)				
Buyer's Agent				
Seller's Agent				
Transaction Coordinator				
Lender/Loan Officer				
Title Company				
Escrow Company/Officer				
Buyer's Attorney				
Seller's Attorney				
Accountant				
Inspector				
Insurance Agent				
(Other)				

 2. Create a Transaction Timeline

Could include any of the below or more (depending on your state requirements and transaction) with dates to complete:

- | | |
|---|---|
| <input type="checkbox"/> _____ (Date) Contract acceptance | <input type="checkbox"/> _____ (Date) Renegotiate offer |
| <input type="checkbox"/> _____ (Date) Down payment/earnest money received by seller | <input type="checkbox"/> _____ (Date) Repairs complete |
| <input type="checkbox"/> _____ (Date) Hire attorney | <input type="checkbox"/> _____ (Date) Loan (or finance) contingency |
| <input type="checkbox"/> _____ (Date) Title search | <input type="checkbox"/> _____ (Date) Final walkthrough |
| <input type="checkbox"/> _____ (Date) Appraisal contingency | <input type="checkbox"/> _____ (Date) Closing date |
| <input type="checkbox"/> _____ (Date) Inspection contingency | |

3. Lender Requirements & Appraisal

- _____ (Date) Paperwork to lender
- _____ (Date) Verify employment
- _____ (Date) Appraisal date
- _____ (Date) Appraisal complete

 4. Ordering Inspections

- _____ (Date) Inspection date
- _____ (Date) Received inspection report
- _____ (Date) Reviewed inspection report
- _____ (Date) Submit request for repairs (if applicable)
- _____ (Date) Renegotiate terms (if applicable)
- _____ (Date) Repairs complete (if applicable)

 5. Closing Documents

- Closing date confirmed
- All documents submitted
- Valid photo ID and additional documents to bring to closing

 6. Final Walkthrough

- Final walkthrough scheduled _____ (Date)

Check the following items during the final walkthrough:

- Appliances (washer/dryer, dishwasher, oven, microwave, refrigerator, etc.)
- Plumbing (run water in bathrooms, kitchen, flush toilets, etc.)
- Heating/cooling system (check the heat and air conditioning, if applicable)
- Electric (check all light switches, test outlets)
- Safety features (fire alarm, carbon monoxide detectors, house alarm)
- General cleanliness (personal property removed)
- No property damages
- Personal property written into the contract for buyers to keep is accounted for

7. Closing & Presenting Keys

- Closing date, time, and location confirmed with all parties
- Closing date: _____
- Signed all documents at closing
- Keys presented to buyers
- Purchase closing gift for buyers

8. Moving Checklist

Provide contact information for the following vendors:

- Water
- Garbage
- Electricity
- Gas
- Cable/Internet
- Movers
- Painters
- Locksmith
- Landscapers