

1. Name the Players of the Transaction

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

ROLE	NAME(S)	PHONE NUMBER	EMAIL ADDRESS	MAILING ADDRESS
Seller(s))				
Buyer(s)				
Seller's Agent				
Buyer'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. Reviewing Inspections & Repair Requests

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

 4. Closing Documents

- _____ Closing date confirmed
- _____ All documents submitted
- _____ Reviewed seller's estimate with seller
- _____ Valid photo ID and additional documents to bring to closing
- _____ Wire instructions or account number for funds
- _____ Schedule call with lender to discuss final payoff amount

 5. Move Out & Prepare for Final Walkthrough

Provide contact information for the following vendors (to cancel or arrange services):

- Water
- Garbage
- Electricity
- Gas
- Cable/Internet
- Insurance
- Landscapers
- Movers
- Post office (change of address)

6. Final Walkthrough

- Final walkthrough scheduled _____ (Date)

Check the following items with the buyer's agent 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

- Leave all remotes, manuals, alarm codes, etc. in a specific drawer in the house
- All services (electric, cable/internet, etc.) turned off
- Review final seller's estimate
- Hand over keys to the buyers
- Remove listing from advertising sites
- Purchase closing gift for sellers