



Buyer Transaction Checklist

Property Address:
 Client:
 Relationship Date: 5/1/19
 Target Price Range:

Sale Price:
 Pending Date: 5/15/19
 Closing Date: 6/30/19
 Buyers Agent:
 Buyers Title / Attorney:
 Sellers Title / Attorney:

- Corresponds with the RELATIONSHIP DATE: Enter the number of days from the date the buyer agency agreement, or relationship is entered into, that the activity is due.
- Corresponds with the PENDING DATE: According to the Contract, enter the number of days from the contract pending/effective date the activity is due.
- Corresponds with the CLOSING DATE: Enter the number of days from the Closing Date this activity is due.

Phase	Day	Issue	Activity Description	Progress	Due	Completed	Notes
Search	0		Send Intro buying process email to seller (pref vendors)		5/1/19		
Search	0		Obtain seller mortgage / financing information		5/1/19		
Search	0		Buyer Agency / Brokerage Agreement		5/1/19		
Search	0		Brokerage Relationship / Duties Disclosures		5/1/19		
Search	0		Setup client / add docs to brokerage compliance		5/1/19		
Offer	0		Ensure pre-approval / POF is current		5/15/19		
Offer	0		Assist with document and signatures as required by agent		5/15/19		
Offer	0		Review details and terms		5/15/19		
Offer	0		Confirm receipt of offers / documents via text & email		5/15/19		
Under Contract	-	None	Mondays -Weekly update emails		WEEKLY		
Under Contract	0		Send BUYER congrats email with team intro		5/15/19		
Under Contract	0		Send AGENT congrats email with team intro (offer to dual)		5/15/19		
Under Contract	0		Review all documents for accuracy		5/15/19		
Under Contract	0		Retrieve missing docs/signatures as required		5/15/19		
Under Contract	0		Check online earnest money deposit availability		5/15/19		
Under Contract	0		Complete & deliver transmittal to title/attorney and lender		5/15/19		
Under Contract	0		Order title and survey		5/15/19		
Under Contract	1		Update closing timeline in Transactly		5/16/19		
Under Contract	2		Transaction Timeline email		5/17/19		
Under Contract	2		Receive and deliver receipt of earnest money		5/17/19		
Under Contract	3		Submit documents to brokerage compliance		5/18/19		
Under Contract	10		Confirm appraisal time and schedule with listing agent		5/25/19		
Under Contract	10		Order and deliver any required warranties		5/25/19		
Under Contract	20		Verify all title work is complete		6/4/19		
Under Contract	20		Verify appraisal has passed		6/4/19		
Under Contract	30		Receive and deliver lender's clear to close		6/14/19		
Inspections	-	None	Mondays -Weekly update emails		WEEKLY		
Inspections	1		Order and schedule all required inspections		5/16/19		
Inspections	1		Send Buyers Inspection Time email		5/16/19		
Inspections	5		Receive, review, and deliver inspection reports		5/20/19		
Inspections	10		Coordinate documents and signatures as required		5/25/19		
Inspections	12		Receive all repair receipts and documentation		5/27/19		
Inspections	12		Submit all inspection docs to brokerage compliance		5/27/19		
Pre Closing	-	None	Mondays -Weekly update emails		WEEKLY		
Pre Closing	-20		Coordinate quotes, and moving service		6/10/19		
Pre Closing	-20		Coordinate utility transfers, internet/cable/satellite		6/10/19		
Pre Closing	-7		Confirm closing times with agents and title		6/23/19		
Pre Closing	-7		Send final walkthrough & closing email to seller		6/23/19		
Pre Closing	-4		Receive / Distribute closing disclosure and settlement statement		6/26/19		
Pre Closing	-4		Send Agent's CDA to title/lender		6/26/19		
Pre Closing	-4		Order agent's thank you closing gift		6/26/19		
Pre Closing	-3		Ensure no addtl amendments are required with agents		6/27/19		
Post Closing	0		Confirm closing and funding		6/30/19		
Post Closing	0		Final milestone email to buyers (feedback request)		6/30/19		
Post Closing	0		Congrats & thank you email to agents (feedback request)		6/30/19		
Post Closing	0		Prepare any post closing requirements / docs of buyer		6/30/19		
Post Closing	0		Submit final documents to brokerage compliance		6/30/19		
Post Closing	0		Close out file		6/30/19		

This Transaction Coordinator Checklist is a sample of the many items managed during a home sale transaction. Checklists like this example, can more efficiently be managed online, by using Transactly's application. Create a free account, by visiting:

Transactly.com