Sales Follow-up Checklist

SALES PROCEDURES:

- ☐ Complete Sales Contract. After fully executed, make 7 copies, and distribute for attorney review— selling realtor, buyer, buyer's attorney, seller, listing agent, seller's attorney, and office file. Remember that you need an original copy for bank (if mortgage is being obtained.) Also include the following:
  - ☐ Notice to Buyer and Seller form (attach to all copies of contract).
  - ☐ Consumer Information Statement.
  - ☐ Lead Paint Disclosure Form & Booklet.
  - ☐ Informed Consent to Dual Agency-buyer (only required if buyer is purchasing a VRI listing.)
  - ☐ Home Warranty Application. Obtain appropriate signatures if accepted, declined or undecided
  - ☐ Copy of first deposit check (check w/deposit form has to turned in within 5 days.)
  - ☐ Complete Bible Sheet/Trust, original goes to Accounting.
  - ☐ Attorney Review: Start date: ______________ Out of Review______________
- ☐ Request Seller's Disclosure and Lead Paint Disclosure forms from sellers (listing agent); have buyer sign upon receipt.
- ☐ Obtain Comparables for file. Appraiser might request them.
  Apprasial Company: ______________________ Date Completed:_____________
- ☐ Refer buyer to Intercounty Mortgage.
- ☐ Refer buyer to YourTownInsurance for Homeowners, Flood. (Required 1 year pre-paid policy.)
- ☐ Co-ordinate inspections with buyer, keeping deadlines in mind. Notify seller and listing broker. Accompany buyer to inspection—do not leave inspector and buyer alone at the property. Buyer to bring checkbook. Touch base with listing broker after inspections.
  Home inspection completed:__________ Septic:___________
  Termite:____________ Well:____________
- ☐ Obtain Mortgage Commitment Letter from buyer. Due date:_________ Received:__________
- ☐ Inspection problems, obtain request for repairs ASAP. Let attorneys handle issues; obtain a copy of requests
- ☐ Remind buyer of second deposit due date. If not received, call attorneys and fax letter re: same (buyer would be in default of contract.)
- ☐ If buyer is handling "Certificate of Occupancy" and/or Fire & Carbon Monoxide inspections, schedule early due to backlogs. Date:_____________ Completed:_____________
  If not, check w/listing realtor that this is being done.
- ☐ Confirm title work, survey and paperwork for mortgage package with buyer's attorney.
- ☐ Make neighborhood calls to inform public of sale.

PRE-CLOSING:

(1 week prior)

- ☐ Co-ordinate with buyer who will call utilities. Have list of utility companies.
- ☐ Confirm buyer has homeowners /flood insurance.
- ☐ Prepare commission bill and any reimbursements and fax to both attorneys. Notify attorney if Home Warranty is to be paid.
- ☐ If we are holding deposit in escrow, request with Trust Release Deposit form from Karen in Accounting, Payable to :____.
- ☐ Check that Certificate of Occupancy is in place.
- ☐ Co-ordinate final walk-through.
- ☐ Schedule closing with attorney or Title Company.
- ☐ Check status of funds for closing.

CLOSING:

- ☐ Take file to closing.
- ☐ Buyer to bring checkbook for any additional adjustments.
- ☐ Listing agent to bring house keys to closing
- ☐ Bring closing gift for new homeowners if you'd like.
- ☐ Collect:
  - ☐ HUD 1 statement
  - ☐ Commission check
  - ☐ Home Warranty check
  - ☐ Smile—its PAYDAY!

AFTER CLOSING:

- ☐ Bring file, commission check and copy of RESPA back to the office, inform secretaries you have closed.
- ☐ Send "Thank You" notes to purchaser and co-operating broker.
- ☐ Add customer to your mailing list.
- ☐ Complete client follow-up form and send to Karen in Accounting.
- ☐ Confirm MLS update.
- ☐ Send out Just Sold postcards.