

Contract to Close Checklist

FIGURE 63 FROM SHIFT

The Contract to Close Checklist will be your roadmap to staying on course and on time as you successfully complete your transaction. You may decide to add other times and deadlines to this checklist that are unique to your market or client. The important point here is to have a checklist you can share, follow, and update.

For more information, see *SHIFT* p. 260.

	Date Expected	Date Completed
1. Contract and earnest money received	_____	_____
2. Earnest money received	_____	_____
3. File opened and Key Contacts added	_____	_____
4. Introduction letter sent to clients	_____	_____
5. Payoff/ Assumption statement ordered	_____	_____
6. Payoff statement received	_____	_____
7. Commitment sent to lender	_____	_____
8. Commitment sent to other agent	_____	_____
9. HOA Info / Resale certificate received	_____	_____
10. Survey ordered or existing survey verified	_____	_____
11. Hazard insurance information received	_____	_____
12. Termite inspection received	_____	_____
13. Full inspection received	_____	_____
14. Repairs addendum signed and received	_____	_____
15. Repair invoice completed and invoice received	_____	_____
16. Home Warranty ordered	_____	_____
17. Lender docs received and verified	_____	_____
18. Closing scheduled with all vendors	_____	_____
19. Closing schedule / reminders sent to clients	_____	_____
20. HUD Statement reviewed and approved	_____	_____
21. Final Closing Package ordered	_____	_____
22. Other	_____	_____