

REAL ESTATE TRANSACTION CHECKLIST



PROPERTY ADDRESS:

NEW LISTING - REQUIRED

- ☐ County tax record which indicates ownership
- ☐ Disclosure to Seller of Brokerage Duties, Responsibilities, and Services
- ☐ Estimated Net to Seller
- ☐ Property Condition Disclosure / Disclaimer / Exemption (Not applicable if Land or Commercial)
- ☐ Lead Based Paint Disclosure (Not applicable if built after 1978)
- ☐ Listing Agreement

NEW LISTING - RECOMMENDED

- ☐ MLS Printout
- ☐ Mortgage Payoff Request
- ☐ Listing Exclusion Form
- ☐ Seller Reserved Items
- ☐ Documentation of Conditions Affecting Sale
- ☐ Association Addendums (HOA /POA/COA only)
- ☐ Covenants and Restrictions (if applicable)

LISTING UNDER CONTRACT - REQUIRED

- ☐ Executed Purchase Contract
- ☐ Acknowledgement & Confirmation of Disclosures
- ☐ Financing Supplement (if applicable)
- ☐ Earnest Money Receipt
- ☐ Documentation of Conditions Affecting Sale
- ☐ Any necessary addendums and supplements
- ☐ Inspection Reports (if applicable)
- ☐ Signed TRR (if applicable)

LISTING UNDER CONTRACT - RECOMMENDED

- ☐ Compensation Agreement (if applicable)
- ☐ Proof of Funds or Pre-Approval Letter

CANCELLED OR RELEASED CONTRACT

- ☐ Signed Release of Contract & Disbursement of Earnest Money Form
- ☐ Notice of Cancellation (if applicable)

BUYER UNDER CONTRACT - REQUIRED

- ☐ Disclosure to Buyer of Brokerages Duties, Responsibilities, and Services
- ☐ Acknowledgement & Confirmation of Disclosures
- ☐ Estimated Cost to Buyer
- ☐ Property Condition Disclosure / Disclaimer / Exemption (not applicable on Land or Commercial)
- ☐ Lead Based Paint Disclosure (Not applicable after 1978)
- ☐ Executed Sales Contract
- ☐ Counter Offer(s) (if applicable)
- ☐ Financing Supplement (not applicable if cash offer)
- ☐ Earnest Money Receipt
- ☐ Any necessary addendums, supplements or waivers
- ☐ Inspection Reports & Invoices (if applicable)
- ☐ Termite Report & Invoice (if applicable)
- ☐ Signed TRR (if applicable)
- ☐ Title Commitment or Attorney Opinion (if applicable)
- ☐ Pin Survey or Mortgage Inspection Survey/Certificate (if applicable)
- ☐ Documentation of Conditions Affecting Sale

BUYER UNDER CONTRACT - RECOMMENDED

- ☐ MLS Printout
- ☐ Realist Tax Record
- ☐ Compensation Agreement (if applicable)
- ☐ Buyer Service Agreement
- ☐ Comparative Market Analysis
- ☐ Loan Pre-Approval Letter or Proof of Funds
- ☐ Association Addendums (HOA /POA/COA only)
- ☐ Covenants and Restrictions (if applicable)

CANCELLED OR RELEASED CONTRACT

- ☐ Signed Release of Contract & Disbursement of Earnest Money Form
- ☐ Notice of Cancellation (if applicable)

CLOSED FILES

- ☐ Settlement Statement (HUD1)
- ☐ Closing Acknowledgment and Release (if provided)