Buyer Checklist

BUYER(s) NAME ___________________________________________________________
ADDRESS _________________________________________________________________

PREPARING FOR BUYER APPOINTMENT
☐ Pre-Qualify Motivation & Financing Over the Phone
☐ Print out Buyer Interview Questionnaire
☐ Customize & Print Buyer Presentation
☐ Send Reminder to Prospect via email (note if applicable) or phone reminder
☐ Prepare Agency Forms, Highlight, & Staple 2 Sets
☐ Prepare Buyer Packet
☐ Confirm the Appointment the Day Before, Written if Possible

AT THE BUYER APPOINTMENT
☐ Conduct Buyer Interview Questionnaire
☐ Conduct Buyer Presentation
☐ Go through Buyer Presentation Checklist
☐ Sign exclusive agreement if applicable
☐ Set up communication schedule
☐ Client Information
  ☐ Email address okay for official contact?:
  _______________________________________________________________________
  ☐ Best Phone Numbers:
  _______________________________________________________________________
  ☐ Children’s names:
  _______________________________________________________________________
☐ Contact Preferences:
  _______________________________________________________________________

AFTER APPOINTMENT THRU WRITING AN OFFER
☐ Add Client to MLS System
☐ Get copy of lender letter
☐ Clear up any Qualification Issues
☐ Input Client into Database
☐ Send applicable home information to Buyer

WRITING AN OFFER
☐ Get Disclosures from Listing Agent for Signature
☐ Prepare, Print and Highlight 2 Contracts
☐ Get Earnest Money Check from Buyer
☐ Present Offer to Listing Broker with Copy of Earnest Money
☐ Provide List of Inspectors, Insurance & Lenders
UNDER CONTRACT

- Deliver Earnest Money & 2 Original Contracts to Listing Broker
- Send Contract to Lender
- Use Service Checklists
- Complete Appropriate Paper
- Request Original Disclosures Mailed from Listing Agent for Signature
- Change Client Status in Database
- Have Client Schedule Inspection with Inspector
- Have Client Attain Homeowner’s Insurance
- Notify Listing Broker of Inspection Time
- Schedule Walk-thru, Closing Time & Location with Listing Broker
- Input Contract Dates into Calendar

Title Objection Deadline ______________
- Reviewed Title Commitment

Inspection Objection Deadline ______________
- Scheduled with Listing Broker

Appraisal Objection Deadline ______________
- Appraisal is Sufficient

Loan Commitment Deadline ______________
- Lender Verifies Loan Commitment

Sewage Inspection Deadline ______________
- Passed

Walk-thru Time & Date ______________________________________________________________
Closing Time & Location _____________________________________________________________
- Send Closing Letter to Client
- Send Cooperation Letter to Listing Broker
- Send Cooperation Letter to Lender
- Call Closing Company for HUD-1 Statement 3 Days Before Closing
- Go over HUD-1 with Client & Ensure They Know to Get Good Funds
- Get Disbursement Authorization (DA) from Administrator for Closing
- Remind Listing Broker about Bringing Keys, Garage Openers, Leases, etc.

CLOSING & POST CLOSING

- Get Contract Docs Signed as Needed
- Send Thank You Letter to Lender
- Send Thank You Letter to Cooperating Agent
- Change Client Status in Database
- Call Next Day to Check on Client
- Send Thank You Letter to Client with Satisfaction Survey
- Send New Home Owner Gift
- Send out Just Sold Cards
- Create file for completed transaction

Agent New Buyer Checklist www.RichLevin.com 585-244-2700