Real Estate Transaction Checklist

Every stage from signed agreement to archived file. One copy per deal.

STACKMODE RE
REAL ESTATE WEB DESIGN

Property address

Client name(s)

Side: listing / buyer / both

Transaction coordinator

Contract accepted (date)

Scheduled closing (date)

KEY DATES FROM THE CONTRACT

Deadline	Date	Reminder set	Owner	Done
Earnest money due				
Disclosures due				
Inspection period ends				
Repair response due				
Appraisal contingency				
Loan contingency				
Title review				
Final walkthrough				
Closing				

WHEN THE AGREEMENT IS SIGNED

- [ ] File opened with client details
- [ ] Listing or buyer agreement attached
- [ ] Required brokerage and agency disclosures signed
- [ ] Agreement expiration date in the calendar

WHEN THE OFFER IS ACCEPTED

- [ ] Executed contract and all addenda in the file
- [ ] Every contract date entered above, with reminders
- [ ] Contract sent to lender
- [ ] Contract sent to title or escrow
- [ ] Client sent a timeline of next steps
- [ ] Client sent the list of contacts

UNDER CONTRACT

- [ ] Earnest money receipt in the file
- [ ] Seller disclosures delivered and signed
- [ ] Inspections scheduled
- [ ] Inspection reports in the file
- [ ] Repair request, response and amendments signed
- [ ] Appraisal ordered and received
- [ ] Loan approval received
- [ ] Title commitment reviewed
- [ ] HOA documents, if any, delivered
- [ ] Client updated after each milestone

BEFORE CLOSING

- [ ] Closing statement reviewed with the client
- [ ] Walkthrough scheduled
- [ ] Utilities transfer confirmed
- [ ] Keys, codes and remotes arranged
- [ ] Possession terms confirmed
- [ ] Signing time and place sent to the client

AFTER CLOSING

- [ ] Final signed documents in the file
- [ ] File submitted for broker review
- [ ] File approved by broker
- [ ] Commission request submitted
- [ ] Commission paid
- [ ] Client thank-you sent
- [ ] Review request sent
- [ ] Sold listing added to your website
- [ ] File archived for your state's retention period

NOTES

> Steps, forms and deadlines vary by state, contract and brokerage. Add your state's required forms and your broker's own steps, and follow your broker's policy. This checklist is a general guide, not legal advice.