



# CONTRACT-TO-CLOSE TRANSACTION COORDINATING CHECKLIST

- Price Changes and Updates as Needed
- Complete Intake Form (internal)
- Update MLS to Active Option
- Create Final Offer Google Drive Folder (internal)
- Review Contract for Errors
- Add Dates to the Calendar (internal)
- Add Dates to Client's System of Record
- Add Dates to Client Calendar
- Send Intro Emails (Title, Lender, Co-Op Buyer or Seller)
- Confirm Seller's Disclosure
- Confirm Survey & T-47
- Obtain Fully Receipted Page
- Confirm Inspection is Set
- Completed Repair Amendment Received
- Update MLS to Pending
- Send Broker Required Documents for Signature
- Send Birthday/Hobby Email (optional)
- Warranties, Disclosures, Service Contracts Transferred
- Check in with Lender Weekly
- Check in with Title Weekly
- Obtain Receipts, Invoices, Photos for Completed Repairs
- Send CDA Request Form to Broker with Docs (10 Days pre-close)
- Appraisal Ordered
- Confirm Home Warranty
- Resale Certificate Ordered
- HOA Docs Received
- Title Work Received
- Send Utility Email
- Confirm Title Received CDA
- Lender Approval
- Reminder to Get Client a Gift
- Schedule Final Walk Through
- Schedule Closing
- Obtain Signed Final Closing Disclosures
- Just Sold Social Media Post
- Thank You Email
- Design Just Sold Postcard (optional)
- Order Just Sold Postcard (Postage/printing additional)

Transaction Coordinating | Listing Coordinating | Admin/Marketing Support

