

Listing Agent Checklist

Property Address: _____
Client's name(s): _____ Contact information: _____
Selling Agent: _____ Contact information: _____
Lender's Name: _____ Contact information: _____
Closing Attorney: _____ Contact information: _____
Paralegal: _____ Contact information: _____
Due Diligence Period Expires: _____
Appraisal Contingency expires: _____ Financing Contingency expires: _____

Confirmed Earnest Money Deposit received

Closing scheduled with closing attorney Date: _____ Time: _____ Location: _____

Closing time and location confirmed with seller

Contract Documents and Information Sent to Closing Attorney

Exclusive Seller Listing Agreement executed

Purchase and Sale Agreement (PSA) executed

Executed Seller's Property Disclosure Statement (SPDS) received Reviewed SPDS with seller for accuracy

Lead-Based Paint Exhibit Yes Not needed - home built after 1978

Fully executed PSA delivered to closing attorney

Seller's contact information (email and number) forwarded to the closing attorney

If applicable, informed closing attorney that seller is in bankruptcy or recently in bankruptcy

If applicable, informed closing attorney that seller is in a divorce proceeding or recently divorced

If applicable, informed closing attorney that seller is not a US citizen

If applicable, informed closing attorney that property is in foreclosure

If applicable, informed closing attorney that seller is delinquent on his or her mortgage payments

If two individuals are on title and one of the sellers is deceased, did they hold title with survivorship rights

If sellers held title with survivorship rights and one is deceased, informed seller that he or she will need to obtain a certified copy of the deceased individual's death certificate and provide to the closing attorney at closing

If applicable, informed closing attorney that seller is an estate and provided probate attorney contact info to same

If estate, confirmed probate has been completed, personal representative sworn in and has authority to sell property and seller estate has obtained an EIN number from probate attorney and set up an estate checking account

If estate and probate not completed, advised estate representative that they will need to retain a probate attorney immediately to begin the probate process

If applicable, informed closing attorney that individual who signed the PSA is the seller's power of attorney and provided a copy of the POA used to the closing attorney for review and approval

If applicable, informed closing attorney that seller lives out of the country

If applicable, informed closing attorney that the seller is a trustee of a trust or corporate entity

Homeowner's Association

Is there a homeowner's association (HOA) Yes No

If applicable, Community Association Disclosure (CAD) completed by seller

Confirmed accuracy of information contained in the CAD OR notified seller in writing for seller to confirm accuracy

Is there a HOA transfer fee Yes No If Yes, amount? _____

Is there a HOA capital contribution and/or initiation fee Yes No If Yes, amount? _____

Property

Termite clearance letter ordered and received if seller's obligation per PSA

Clear termite clearance letter forwarded to the selling agent and closing attorney

Pre-Closing

Seller Attendance at Closing

Will seller(s) (any person on title) be attending closing Yes No If No, has closing attorney been notified
If seller will not be at closing, confirmed with closing attorney whether seller signing by POA or remote closing
If seller signing by POA, confirmed with closing attorney POA has been sent to seller for execution
For remote closing, explained to seller that he or she cannot electronically sign the closing documents and that they will be required to sign the closing documents in front of a witness and separate notary and overnight the original documents back to the closing attorney prior to closing
Confirmed that closing attorney has communicated with seller and seller has provided all information requested

Home Warranty, Termite Bond

Ordered home warranty (if applicable)
Home warranty forwarded to the selling agent and closing attorney
If seller is required to provide a transferable termite bond (and bond already in place), confirmed the expiration date of the bond and the procedure for said transfer
If seller is required to provide a transferable termite bond (and bond is not currently in place), confirmed that bond has been ordered
If seller is required to provide a transferable termite bond, bond has been forwarded to closing attorney

Repairs, Walk-through and Keys

Confirmed all repairs required per the PSA by seller have been satisfactorily completed a few days before closing
Reviewed the Seller's Property Disclosure Statement, PSA and Amendment to Address Concerns with seller to ensure that any personal property or otherwise that is to remain at the property is in fact left
Confirmed that all personal property or otherwise (that is not required to be left) has been removed from the home
Walk through scheduled Date: _____ Time: _____
Confirmed with seller all keys, garage door openers, access cards, etc. will be provided to buyer at closing

ALTA/HUD Review

Received a copy of the ALTA/HUD before closing
Compared ALTA/HUD with PSA for accuracy
ALTA/HUD reviewed with seller

Seller Proceeds and Wiring Instructions

Assuming funding authorization is needed at closing, discussed with seller whether they prefer a check or wire
If they prefer a check and funding authorization is required, discussed with seller that they will have to either (i) wait for a check until funding authorization has been received by the closing attorney (which sometimes doesn't happen until the following business day for late afternoon closings), (ii) pick up the check later in the day or the next business day following the closing or (iii) the closing attorney can overnight the check.
If they prefer a wire, confirmed that the seller will bring wiring instructions to the closing (even if they tell you they already provided them to the closing attorney by email)

Pre-Closing and Closing

Removed lock box and sign from property
Confirmed seller turned over all keys, garage door openers, access cards, etc.
Obtained executed ALTA/HUD from closing attorney, commission check and termite letter (if applicable)
Confirmed commission check is accurate
Reminded seller not to cancel insurance until funding authorization has been received by closing attorney
Remind seller to bring valid driver's license/passport and Green Card

After Closing

Received funding authorization notification from the closing attorney **prior** to submitting check to broker
Submitted executed ALTA/HUD, commission check and termite letter (if applicable) to broker

Additional Issues of Concern

Condominiums: Confirmed with HOA storage unit(s) and/or garages (if applicable) are associated with property
Zoning/Permitting: Confirmed with governmental authority any structure added after the original building was built was properly permitted
For tenant-occupied properties, confirmed that pro-ration of rent(s) and transfer of security deposit(s) addressed in the Special Stipulations
Confirmed lease for tenant-occupied property has been sent to closing attorney
Notified closing attorney that PSA includes the sale of a mobile home
If property includes the sale of a mobile home, confirmed that all applicable VIN numbers are listed in Special Stipulations or that mobile home titles have been surrendered and that a form T-234 has been recorded of record
Confirmed property has one Parcel Identification Number (PIN) (unless multiple parcels are being purchased)
If multiple PINs are involved with the closing, both PINs are listed on the PSA and closing attorney is notified immediately that two PINs are involved with the sale