



- \_\_\_ Identify issues to be addressed in an attached addendum
- \_\_\_ Complete contract on appropriate form
- \_\_\_ Update estimate of closing cost and review with client as client's offer is being negotiated

## **PURCHASE PROCESS**

- \_\_\_ Make certain the Client Profile Sheet and Management System has been updated and is current
- \_\_\_ Complete Mortgage Rate Comparison Worksheet
- \_\_\_ Confirm that the origination fee, discount points, and any other loan cost do not exceed those called for in the contract
- \_\_\_ If there are loan assumptions, verify that the existing loan is assumable under the conditions called for in the contract
- \_\_\_ Determine the buyer's lender of choice and deliver original final contract to lender
- \_\_\_ Update the Management System
- \_\_\_ Complete lender's progress report
- \_\_\_ Confirm buyer has made application and received lender's good faith estimate
- \_\_\_ Compare lender's good faith estimate with the estimate of closing cost that agent furnished client prior to fully consummating the contract
- \_\_\_ Deliver copy of contract to closing authority ( title company, attorney, other )
- \_\_\_ Consult with client on home inspections and set-up the inspections
- \_\_\_ Complete Insurance Comparison Worksheet
- \_\_\_ Advise closing authority who the insurance firm will be and the amount of the first year's premium
- \_\_\_ Make certain FHA and/or VA final inspections have been ordered and the property has passed final inspection
- \_\_\_ Make certain the survey and appraisals have been ordered by the lender or the buyer if the transaction is an "all cash" transaction

- \_\_\_ Make certain all repairs and conditions required by FHA, VA, or any other party having authority to make such requirements will be or have been met
- \_\_\_ Verify if the termite inspection has been completed and the results
  
- \_\_\_ Coordinate transfer of utilities and advise about garbage pick-up
  
- \_\_\_ Review HUD-A closing statement prior to closing for correctness and compare with agent's estimate of closing cost as furnished client prior to fully consummating the contract to purchase
  
- \_\_\_ Advise client of the exact amount of money the buyer will need to bring to closing, the form of payment that will be required, and the name the instrument should be made out to
  
- \_\_\_ Complete Savings Sheet
  
- \_\_\_ Do final walk through
  
- \_\_\_ Complete home owner's warranty forms prior to closing and take to closing
  
- \_\_\_ Attend closing
  
- \_\_\_ Secure keys to home, garage door openers, and manuals to all built-in appliances
  
- \_\_\_ Update Management System with final information from closing and change the "estimated" closing cost calculations to "actual" closing cost amounts
  
- \_\_\_ Print out Management System report for transaction and turn in required documentation to broker
  
- \_\_\_ Erect sign in yard and take photographs
  
- \_\_\_ Write letters to neighbors
  
- \_\_\_ Remove sign and continue follow-up program

**AGENT COMMENTS:**

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