

BUYER Checklist

1. BUYER PREP.

- Set an appointment to meet with the buyer
- Discuss buyer criteria (Questionnaire)
- Counsel buyer on financing and lender options
- Have buyer secure pre qualification letter
- Research listings meeting buyer criteria
- Send listings to buyer
- Schedule showings for selected properties with selling agents
- Explain neighborhood options/schedule tours

2. SHOWINGS

- Give client the "Buyer Information folder
- Collect feedback from buyer on each property
- Track trends in the feedback for future property searches that reflect the buyer's preferences
- Take notes of questions buyer has to follow up with the selling agent if needed
- File and track all properties shown
- Send listings to buyer
- Determine if buyer is ready to make an offer on any properties shown

3. UNDER CONTRACT

- Confirm earnest money payment to attorney
- Confirm lender that buyer is using
- Confirm property has been marked pending sale
- Order inspection
- Post "Under Contract social media blast

4. DOCUMENTS

- Agency Disclosure Brochure
- Buyer's Agency Agreement
- Buyer's Information Sheet
- Buyer Questionnaire
- Copy of pre qualification letter
- Prepare "Buyer Information folder. Include community brochures and listing printouts of properties to be shown.

5. OFFER

- Discuss moving timeline/closing date with buyer
- Write up contract based on buyer terms offered
- Confirm contract and contingencies with buyer
- Get contract signed by buyer
- Write cover letter to submit with contract
- Deliver contract to seller's agent counter offers
- Negotiate any counter offers
- Have final negotiated contract signed by buyer

Notes



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6. INSPECTION

- Have property inspected within the timeframe allowed by the contract
- Obtain inspection results
- Check recommended repairs for compliance with the contract
- Prepare a list of requested repairs for the seller's agent
- Agree on inspection items to be repaired by the seller
- Request documentation to verify completion of inspection repairs
- Confirm completion of CL-100 prior to closing

7. CLOSING AND BEYOND

- Communicate with lender to confirm timeline to close
- Confirm closing date and submit documentation to buyer's closing attorney
- Attend closing
- Deliver closing gift
- Post "Just Sold" social media blast.
- Schedule closing emails with information for new property owners
- Follow up with clients one month post-closing
- Send "Thank you for letting me represent your email requesting online reviews on FB, Google, and Zillow

Lets find your dream home



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