

TRANSACTION CHECKLIST Closing Worksheet

1 **Broker name** 0.00 **Agent** 0.00

2 Seller Name(s) _____

3 Buyer Name(s) _____

4 Buyer agency Yes No

5 Property Address _____

6 Dates

7 Date of closing _____ Time _____ Place _____

8 Reset date _____ Time _____ Place _____

9 Offer to Purchase amended for new closing date Yes No

10 Seller notified on _____ Reset on _____ Copy of closing statement mailed on _____

11 Buyer notified on _____ Reset on _____ Copy of closing statement mailed on _____

12 Buyer's attorney on _____ Reset on _____ Copy of closing statement mailed on _____

13 Seller's attorney on _____ Reset on _____ Copy of closing statement mailed on _____

14 Other broker on _____ Reset on _____ Copy of closing statement mailed on _____

15 Title company/lender on _____ Reset on _____ Copy of closing statement mailed on _____

16 Buyer notified to get insurance on _____

17 Notified to bring check (certified/cashier) in the amount of \$ _____ by _____ on _____

18 Mortgage

19 Seller mortgage Land contract payoff ordered on _____

20 from _____ by letter by phone Received _____

21 Seller mortgage assumption figures ordered on _____

22 from _____ by letter by phone Received _____

23 Deed for underlying land contract ordered on _____

24 from _____ by letter by phone Received _____

25 Title

26 Title policy Abstract delivered to _____ on _____

27 Title, etc. to be ordered by Lister Attorney

28 Name of title company _____ Date ordered _____ Date received _____

29 Special assessment letter Ordered from _____ on _____ Received on _____

30 Floodplain letter Ordered from _____ on _____ Received on _____

31 Survey Ordered from _____ on _____ Received on _____

32 Who is preparing transfer form and deed? _____ other closing documents? _____

33 Commission

34 Total commission _____ % or \$ _____

35 Listing \$ _____ Selling \$ _____

36 Listing co. _____ Associate _____ Phone _____

37 Selling co. _____ Associate _____ Phone _____

38 Referral Yes No Broker 0.00

39 Home warranty Yes No Paid for by Seller Buyer

40 Utilities

41 Safe water test/well inspection Ordered from _____ Received _____

42 Septic inspection Ordered from _____ Received _____

43 Water proration _____ Fuel oil credit _____

44 Sewer proration _____ Fuel company _____

45 From _____ Tank capacity _____ % full _____

46 To _____ Gallons @ _____

47 Paid _____ \$ _____ including tax

48 Penalty \$ _____ Delinquencies \$ _____

49 Final ordered on _____ Name changed

50 **Rental Data**

51 Apartment _____ Tenant name _____ Rent \$ _____ Security deposits _____
 52 Apartment _____ Tenant name _____ Rent \$ _____ Security deposits _____
 53 Apartment _____ Tenant name _____ Rent \$ _____ Security deposits _____
 54 Apartment _____ Tenant name _____ Rent \$ _____ Security deposits _____
 55 Rents and deposits held by _____ Prorate and transfer at closing Yes No
 56 Condominium/Homeowner's fees \$ _____ /month Arrears _____
 57 Paid to _____

58 **Rental weatherization** n/a Certificate of Compliance Stipulation Waiver

59 **Property Taxes**

60 Assessed value for _____ \$ _____
 61 Tax for _____ \$ _____ basis for proration on _____ days
 62 Outstanding or contemplated special assessments Yes No To be paid by seller/buyer _____

63 **Miscellaneous notes** _____

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