

PURCHASE OF REAL ESTATE CHECKLIST

FILE _____

General

G Buyer _____ Spouse _____
 Home Address _____ Phone _____
 Property Address _____ Employer _____
 Seller _____ Attorney _____
 Lender _____ Realtor _____
 Purchase Price \$ _____ Paid Down \$ _____ Est. Fee \$ _____
 Buyers' title: **F**Jt. Ten. **F**Ten. Comm. **F** _____
F File Opened **F** Master list **F** Letter: A B E F **F** Fee Est. to Computer

OFFER

G **F** Copy Received **F** Reviewed **F** Termite Certificate
F Poss. Date _____ **F** Vacant Lot **F** New Construction
F Closing Date _____ **F** Contract Terms: \$ _____ at _____ %
F Secondary Financing _____ Payment \$ _____ Term _____
 By _____ **F** Prorated Taxes to _____ closing _____ poss
 \$ _____ at _____ % **F** Personal Prop. _____
 Payment _____ Term _____ **F** _____
F _____ **F** _____

ABSTRACT

G **F** Need By _____ **F** Opinion issued on: _____
F Received on _____ **F** Copies: _____ Atty. _____ T.O. file
F Examined _____ Lender
F Summary Prepared _____ **F** Status Report to Realtor

DATA

G **F** Transfer Tax \$ _____ **F** Assume Closing on: _____
F Mortgage to _____ Per Diem \$ _____
 Principal ____/____/____ \$ _____ Int.\$ _____ Total\$ _____
F 2nd Mortgage to _____ Per Diem \$ _____
 Principal ____/____/____ \$ _____ Int.\$ _____ Total\$ _____

F Taxes Due This Fiscal Year: \$ _____

First Half \$ _____ **F** Paid **F** Penalty \$ _____ = \$ _____

Second Half \$ _____ **F** Paid **F** Penalty \$ _____ = \$ _____

F Tax Proration Worksheet Completed

F Commission \$ _____ **F** Termite Inspection/Treatment \$ _____

F _____ **F** _____

PREPARE TO CLOSE

G **F** Closing Schedule: Date _____ **F** Closing Statement

Place _____ Time _____ _____ Drafted _____ Atty. Checked

By _____ Realtor _____ Us: _____ Typed Final Copies to:

_____ Client _____ Atty. _____ Client _____ File (3)

_____ Lender _____ Realtor _____ Atty. _____

F Deed (contract): _____ Copy rec'd **F** Figures checked with Seller's attorney

_____ To Client _____ Reviewed **F** Checks prepared if necessary

F _____ **F** _____

CLOSING

G **F** Sign note and mortgage (contract) **F** Voter registration card

F Title objections card **F** Declaration of value

F Check deed (contract) **F** Groundwater Hazard Statement (Clean?)

F Mark deed (contract) "Return to SRL&V" **F** Documents to _____ for recording

F Checks exchanged **F** Statement to Client

F Insurance policy or binder **F** _____

F Escrow agreement **F** _____

F Termite certificate/treatment * * * * *

F Keys delivered **F** Closing checks distributed

F Lien waivers **F** Address change to computer

F Utilities transferred **F** Homestead reminder prepared

F Soc. Sec. No. _____ **F** _____

F Abstract to lender/_____ **F** _____

ABSTRACT

G **F** Expect abstract by _____ **F** Certificate issued on _____
F Abstract rec'd on _____ **F** Certificate and abstract to Lender
F Examined _____

FOLLOW UP

G **F** Dated for escrow review **F** _____
F Dated for final review **F** _____
F Escrow distributed on _____ **F** Final Review by _____ on _____