

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** 2<sup>nd</sup> 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 \_\_\_\_\_