**PURCHASE OF REAL ESTATE CHECKLIST**

**FILE ________________**

**General**

- **Buyer** __________________________  **Spouse** __________________________
- **Home Address** _____________________  **Phone** __________________________
- **Property Address** ___________________  **Employer** _______________________
- **Seller** ___________________________  **Attorney** ________________________
- **Lender** ___________________________  **Realtor** _________________________
- **Purchase Price** $___________  **Paid Down** $___________  **Est. Fee** $_________

**Buyers’ title:**
- F Jt. Ten.
- F ___________________________

**File Opened**  **Master list**  **Letter:** A B E F  **Fee Est. to Computer**

**OFFER**

- **Copy Received**  **Reviewed**  **Termite Certificate**
- **Poss. Date** _____________________  **Vacant Lot**  **New Construction**
- **Closing Date** ____________________  **Contract Terms:** $_______ at _____%
- **Secondary Financing** ____________  **Payment** $_______  **Term** _______

  By __________________________      **F Prorated Taxes to_____ closing_____ poss

  $_______ at ______%  **F Personal Prop.____________________

  **Payment**_______  **Term**_______  **F ___________________________

**ABSTRACT**

- **Need By** ______________________  **Opinion issued on:**_________________
- **Received on**___________________  **Copies:** Atty.  T.O. file
- **Examined**_____________________  ____Lender
- **Summary Prepared**______________  **F Status Report to Realtor**

**DATA**

- **Transfer Tax** $__________________  **Assume Closing on:**___________
- **Mortgage to**_____________________  **Per Diem** $_________

  Principal ____/____/_____ $____   Int.$_______  **Total**$_________

- **2nd Mortgage to**_________________  **Per Diem** $_________

  Principal ____/____/_____ $____   Int.$_______  **Total**$_________
### Taxes Due This Fiscal Year:

<table>
<thead>
<tr>
<th>First Half</th>
<th>$_____</th>
<th>F Paid</th>
<th>F Penalty $_____ = $_________</th>
</tr>
</thead>
<tbody>
<tr>
<td>Second Half</td>
<td>$_____</td>
<td>F Paid</td>
<td>F Penalty $_____ = $_________</td>
</tr>
</tbody>
</table>

### Tax Proration Worksheet Completed

- **Commission**: $_________
- **Termite Inspection/Treatment**: $_________

### Prepare to Close

**G**  
- **Closing Schedule**: Date: ________  
- **Closing Statement**:  
  - Place: ________  
  - Time: ________  
  - Drafted: ________  
  - Atty. Checked: ________  
  - Typed Final: ________  
  - Copies to:  
    - Client: ________  
    - Atty.: ________  
    - Lender: ________  
    - Realtor: ________  
    - Attorney: ________  
  - Deed (contract): ________  
  - Figures checked with Seller’s attorney: ________  
  - To Client: ________  
  - Reviewed: ________  

### Closing

**G**  
- **Sign note and mortgage (contract)**: ________  
- **Voter registration card**: ________  
- **Title objections card**: ________  
- **Declaration of value**: ________  
- **Check deed (contract)**: ________  
- **Groundwater Hazard Statement (Clean?)**: ________  
- **Mark deed (contract) “Return to SRL&V”**: ________  
- **Documents to ________ for recording**: ________  
  - Checks exchanged: ________  
  - Insurance policy or binder: ________  
  - Escrow agreement: ________  
  - Termite certificate/treatment: ________  
  - Keys delivered: ________  
  - Lien waivers: ________  
  - Utilities transferred: ________  
  - Soc. Sec. No.: ________  
  - Homestead reminder prepared: ________  
  - Closing checks distributed: ________  
  - Address change to computer: ________  
  - Statement to Client: ________  
  - Homestead reminder prepared: ________  

### Closing Checks Distributed

- **Closing checks distributed**: ________  
  - **Address change to computer**: ________  
  - **Homestead reminder prepared**: ________  
  - **Statement to Client**: ________  

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__________