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REAL ESTATE CLOSING CHECKLIST

1. Client Information

- ☐ Full Name
- ☐ Contact Number
- ☐ Email Address
- ☐ Address of Residence
- ☐ Preferred Method of Contact
Phone, Email, Text, etc.

2. Initial Client Meeting

- ☐ Date of Meeting
- ☐ Client's Real Estate Goals
Buying, Selling, Investment, etc.
- ☐ Budget or Selling Price Expectation
- ☐ Desired Timeline for Transaction

3. Property Information (If Selling)

- ☐ Property Address
- ☐ Year of Construction
- ☐ Total Square Footage
- ☐ Number of Bedrooms
- ☐ Number of Bathrooms

☐ **Parking Facilities**

Garage, Street Parking, etc.

4. Heating and Cooling Systems

☐ **Recent Renovations or Upgrades**

5. Market Analysis and Pricing

☐ **Comparative Market Analysis Completion Date**

☐ **Recommended Listing Price**

☐ **Client Approval of Listing Price**

6. Listing Agreement (If Selling)

☐ **Listing Agreement Signing Date**

☐ **Duration of Listing**

3 months, 6 months, etc.

☐ **Commission Percentage**

7. Property Marketing (If Selling)

☐ **Professional Photography Date**

☐ **Listing Description Completion**

☐ **Listing Publication Date**

MLS, Website, Social Media, etc.

☐ **Open House Dates**

8. Buyer's Property Search (If Buying)

☐ **Property Preferences**

Apartment, House, Condo, etc.

☐ **Preferred Neighborhoods**

☐ **Must-have Features**

Pool, Garden, Office, etc.

☐ **Property Viewing Schedule**

☐ **Offer and Negotiations**

☐ **Offer Submission Date**

☐ **Counteroffer Details**

☐ **Final Offer Acceptance Date**

9. Contract and Legal

☐ **Purchase/Sale Contract Signing Date**

☐ **Disclosure Documents**

Lead-Based Paint, Property Condition, etc.

☐ **Attorney Review Completion (if applicable)**

10. Financing and Appraisal (If Buying)

☐ **Mortgage Pre-approval Letter**

☐ **Loan Application Submission Date**

☐ **Appraisal Order and Completion Date**

11. Inspections

☐ **Home Inspection Schedule**

☐ **Inspection Contingency Removal Date**

☐ **Additional Inspections**

Pest, Radon, etc.

12. Closing Preparations

☐ **Closing Agent Contact Information**

☐ **Final Walk-Through Schedule**

☐ **Closing Date**

13. Closing Process

☐ **Closing Documents**

Deed, Bill of Sale, Affidavits, etc.

☐ **Funds Transfer Completion**

Down Payment, Closing Costs, etc.

☐ **Keys and Property Handover Date**

14. Post-Closing

☐ **Feedback Collection from Client**

☐ **Referral Request Date**

☐ **Follow-Up Schedule for Future Check-ins**