

# TRANSACTION CHECKLIST

## BUYSIDE

ROARING AGENT

- Get Signed Agreement/Turn It In
- Order Inspections
- Send Agreement To The Lender
- Open Escrow
- Put All Deadlines Into Your Calendar
- Update Client In Your CRM
- Get Earnest Money Deposited
- Stay Updated With Title and Lender
- Negotiate Repairs
- Order Appraisal
- Ask For A Referral
- Update Your Brokerage File
- Schedule Signing
- Ask For An Online Review
- Schedule Key Delivery
- Order Client Gift
- Confirm Repairs Are Completed
- Final Walkthrough
- Deliver Keys and Gift
- Take Pictures of Buyers For Marketing
- Send Thank You Notes
- Schedule A Client Party
- Update Client In CRM
- Add Anniversary Date to CRM

### NOTES

Agent \_\_\_\_\_

Lender \_\_\_\_\_

Title \_\_\_\_\_

Inspection Date: \_\_\_\_\_

Close Date: \_\_\_\_\_

Earnest Money: \$ \_\_\_\_\_

Earnest Money Due Date: \_\_\_\_\_

Ask for Referral/Review

ROARING AGENT