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| **Offer to Purchase Date Opened** | |
| * Search, print, save property info from CSR * Open property in Pipeline * Update for all information * Seller lead is active * Acquisition Manager (If Larry, change to Kandas) * Pipeline status (waiting for contract) * Our Buying Entity (NHG unless someone tells you differently) * Exit strategy (assignment or seller finance) * (see contract cheat sheet for data to fill in) * Attorney (Harry Marsh) * Legal description (from property description) * County * EM Amount ($1000) * Date contract sent   🞏 Create contract and get seller signature via Right Signature or other means | (**When contract is fully executed)**   * Create Seller information and get signed * Request Evaluation when contract is executed * Eval completed * Property Meeting Review * Enter sell amount in Podio * Title Search req: comp: * Property has tenant: * Application * Lease * Rent roll * Spare key * Task to Market * Memorandum req:   **Contracted Sale Price**:  Note any special discounts/deals: |
| **Closing Actual Price Closing Date** | |
| **Buyer in Place**   * Buyer Information Sheets completed/signed * Wire proof received * Assign Agreement signed * Send information to atty (assign/buyer info) (make note if Seller Financed) * Review loan docs for accuracy, upload when accurate * Notary scheduled \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ * Buyer closing docs and wire transfer to buyer day before | **After Closing**   * Update Podio (seller lead – FU or dead, deal – closed, ld mgr deleted, assignment fee entered) * Transfer folder to closed files * Seller’s HUD, highlight assign fee, write acq mgr & seller, attach any invoices * Fwd Warranty Deed to notify buyer and seller * Provide seller with tracking number for proceeds/wire info * Move hard file to closed cabinet |
| **Whole Seller Financing – closing docs should include:** | |
| * Create Amortization Schedule * Buyer – insurance policy listing mortgagee * Create Information sheet | * **Provide to Buyer/Seller:** * Amortization schedule * all signed closing docs * SF information sheet * Warranty deed/deed of trust * **Tenant info/lease/keys** |