



Closing Checklist

Property Address _____

Offer to Purchase		Date Opened _____	
<input type="checkbox"/> Search, print, save property info from CSR <input type="checkbox"/> Open property in Pipeline <input type="checkbox"/> Update for all information <ul style="list-style-type: none"> • 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 <input type="checkbox"/> Create contract and get seller signature via Right Signature or other means _____		(When contract is fully executed) <input type="checkbox"/> Create Seller information and get signed <input type="checkbox"/> Request Evaluation when contract is executed <input type="checkbox"/> Eval completed <input type="checkbox"/> Property Meeting Review <input type="checkbox"/> Enter sell amount in Podio <input type="checkbox"/> Title Search req: _____ comp: _____ <input type="checkbox"/> Property has tenant: <ul style="list-style-type: none"> • Application • Lease • Rent roll • Spare key <input type="checkbox"/> Task to Market <input type="checkbox"/> Memorandum req: _____	
		<div style="border: 1px solid black; padding: 5px;"> Contracted Sale Price: Note any special discounts/deals: </div>	
Closing		Actual Price _____	
Buyer in Place <input type="checkbox"/> Buyer Information Sheets completed/signed <input type="checkbox"/> Wire proof received <input type="checkbox"/> Assign Agreement signed <input type="checkbox"/> Send information to atty (assign/buyer info) (make note if Seller Financed) <input type="checkbox"/> Review loan docs for accuracy, upload when accurate <input type="checkbox"/> Notary scheduled _____ <input type="checkbox"/> Buyer closing docs and wire transfer to buyer day before		Closing Date _____ After Closing <input type="checkbox"/> Update Podio (seller lead – FU or dead, deal – closed, Id mgr deleted, assignment fee entered) <input type="checkbox"/> Transfer folder to closed files <input type="checkbox"/> Seller's HUD, highlight assign fee, write acq mgr & seller, attach any invoices <input type="checkbox"/> Fwd Warranty Deed to notify buyer and seller <input type="checkbox"/> Provide seller with tracking number for proceeds/wire info <input type="checkbox"/> Move hard file to closed cabinet	
Whole Seller Financing – closing docs should include:			
<input type="checkbox"/> Create Amortization Schedule <input type="checkbox"/> Buyer – insurance policy listing mortgagee <input type="checkbox"/> Create Information sheet		<input type="checkbox"/> Provide to Buyer/Seller: <ul style="list-style-type: none"> ○ Amortization schedule ○ all signed closing docs ○ SF information sheet ○ Warranty deed/deed of trust ○ Tenant info/lease/keys 	