"Bridging the Gap to Homeownership"

SELLING AGENT CHECKLIST

(X)	TASK	TRAINING MODULE
	1. Obtain Potential Buyer's contact information and preferred method of contact	**PART 1**
	2. Obtain a copy of Buyer's Pre-Approval. If none, we can pre-approve - forward them the Floify Link.	
	3. Contact the Loan and share contact information.	
	4. Send Home Buyer's Guide and Service Guarantee	
	5. Execute a Buyer's Representation Agreement (OPTIONAL – But HIGHLY recommended)	**PART 2**
	6. Create Purchase Loop in Dotloop. Use Borrowers Name as File Name. Later change to property address upon accepted offer.	
	7. Establish Needs/Wants.	
	8. Set up a drip. Preview listings before sending once you get a feel for their preferences to prevent Buyer feeling we are disconnected.	
	9. Show Homes (Review Agent Notes for Showing, Remarks, Financing, and Offer Instructions)	**PART 3**
	10. Write and Present an Offer.	
	11. Accepted Offer – Notify Lender w/ Accepted RPA & Escrow Info. EMD sent. 10 Things to Avoid goes out.	**PART 4**
	12. Schedule Home Inspection.	
	13. Ensure Appraisal Ordered.	
	14. Review Disclosures. Insurance Flyer goes out.	**PART 5**
	15. Request for Repairs/Contingency Removals	
	16. Closing Disclosure (Minimum 3 days before Docs)	**PART 6**
	17. Verification of Property	
	18. CTC/Loan Docs/Funding	
	19. Closing Confirmed/Keys Distributed/Closing Gift	
	20. Review/Survey/CRM for Follow-Up at Intervals	

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