



TEXASEXCELTITLE.COM

BUYERS AGENT TRANSACTION CHECKLIST

BUYERS:

CLOSING DATE:

- GET PRE-QUALIFIED
- BUYER TO SIGN BROKER REP FORMS
- UPLOAD PRE-QUALIFICATION LETTER TO CLIENT'S FILE
- HOUSE HUNT
- RUN CMA'S ON HOME OF INTEREST
- NOTIFY LISTING AGENT OF INCOMING OFFER
- SEND TO LISTING AGENT WITH 1-4 CONTRACT
 - - Pre-qual letter and financing addendum
 - - All other applicable addendums
- SEND EXECUTED CONTRACT TO BUYERS, LENDER, AND TEXAS EXCEL TITLE
- SEND EARNEST & OPTION MONEY TO TEXAS EXCEL TITLE USING ZOCCAM
- HAVE BUYER SCHEDULE INSPECTIONS
- SELECT AND ORDER HOME WARRANTY
- CONFIRM LENDER SCHEDULED APPRAISAL
- REMIND BUYERS TO GET HOME INSURANCE
- ORDER CLOSING GIFT
- SCHEDULE FINAL WALK THROUGH
- REMIND BUYER TO SET UP UTILITIES



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BUYERS AGENT TRANSACTION CHECKLIST

- REQUEST CDA FROM YOUR BROKER AND SEND TO TEXAS EXCEL TITLE
- REVIEW FINAL CLOSING DISCLOSURE WITH BUYER
- SCHEDULE CLOSING DAY WITH TEXAS EXCEL TITLE
- FINAL WALK-THROUGH
- CLOSING DAY
- CELEBRATE

NOTES

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