

PROPERTY ADDRESS: _____

MLS: _____

VACANT/OCCUPIED

CBS CODE: _____

<u>TRANSACTION INFO:</u> Purchase Price: \$ _____ Acceptance Date: _____ Closing Date: _____ EM Due: _____ Closing Scheduled: _____ @ _____ A/P	<u>INSPECTIONS:</u> Inspection Deadline- _____ Delivery Deadline: _____ Objection Deadline: _____ Resolution Deadline: _____ <i>Re-Inspection Date:</i> _____	<u>LISTING BROKER:</u> Name: _____ Brokerage: _____ Phone: _____ Email: _____ TC?: Y / N _____
<u>PROPERTY/SELLER DISCLOSURE:</u> Delivery Deadline: _____ Objection Deadline: _____ Resolution Deadline: _____ No Disclosure - Signed Form: Y / N	Home Inspection- Date: _____ Time: _____ Company: _____ Phone: _____ Who Pays: Buyer / Seller	<u>TITLE AGENT:</u> Name: _____ Company: _____ Phone: _____ Email: _____ Address: _____
<u>SURVEY/TITLE DOCS:</u> Delivery Deadline: _____ Objection Deadline: _____ Resolution Deadline: _____	Termite/Dry Rot Inspection- Date: _____ Time: _____ Company: _____ Phone: _____ Who Pays: Buyer / Seller	<u>LENDER INFO:</u> Name: _____ Company: _____ Phone: _____ Email: _____
<u>APPRAISAL: Y / N</u> Who Pays: Buyer / Seller <u>WARRANTY: Y / N</u> Who Pays: Buyer / Seller Company: _____	_____ Inspection- Date: _____ Time: _____ Company: _____ Phone: _____ Who Pays: Buyer / Seller	<u>BUYER:</u> Name(s): _____ Phone: _____ Email: _____ Email 2: _____
<u>HOA DOCS:</u> Delivery Deadline: _____ Objection Deadline: _____ Resolution Deadline: _____	_____ Inspection- Date: _____ Time: _____ Company: _____ Phone: _____ Who Pays: Buyer / Seller	<u>NOTES:</u> _____ _____ _____ _____

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<u>TIMELINE</u>	<u>BOMB BOMB</u>	<u>ACTION ITEMS:</u>	<u>PAPERWORK SUBMISSION:</u>	<u>CHECK:</u>
ASAP Under Contract (Within 12 hours)	BombBomb#1 - Under Contract BombBomb#2 - Inspection	Send Professional Email/Open Title (Contract with all Counters, Addendum etc) Send to: Title, Lender, Agents Send Tax Bill & Est Tax for Buyer to sign. If delivered Seller Disc, send to Buyer to review/sign.	Submit to WolfConnect: Purchase Agreement Counters (if appl) LBP (if appl) Pre-Qual Letter Addendums (if appl)	Find out if Buyer wants to be present for Inspections. **Stress timelines of Earnest Money delivery Make sure all docs so far have all initials & signatures needed before submitting
First Week Under Contract	BombBomb#3 - Title Info BombBomb#4 - Appraisals	Order Inspections - Send Inspection Dates/Times to Buyer Email Listing Agent inspection dates/times Get receipt of EM from Title (verify it's on time)	Earnest Money Receipt Signed Seller Disc. Tax Bill & Est Tax	Check if home is Vacant or Occupied to schedule inspections. If haven't gotten it, check in for Seller Disc & Solar Docs (if appl)
After Inspections	BombBomb#5 - ORW BombBomb#6 - Home Warranty	Send Reports to Listing Agent & Buyer & ONLY Invoices to Title. Prepare ORW & submit Check with Lender on loan update/timeline. Check with Lender on Appraisal status. Schedule re-inspection (if app)	Inspection Reports HOA docs (if app)	Received Survey? Sent to Buyer? Received Title Binder? (CCRs, etc) Sent to Buyer? Make sure Inspections have been paid by party paying. If HOA, check if we got docs. If so, make sure Buyer signs everything needed.
1 Week Prior to Closing	BombBomb#7 - Closing	Schedule walk-through Schedule closing Order Home Warranty (if app) Verify if keys will be at closing Read Settlement Statement - Verify all \$\$ is correct w/ Title	Finalized ORW PA Cover Sheet Any additional forms	If Buyer elected to not get Home Warranty, still check one last time. Schedule closing in AM or prior to 12p if possible. Verify all's good with loan - clear to close?
After Closing	BombBomb - Congrats on Your New Home!	Thank Listing Agent for a great transaction.	QSS - you need to ask Title to send this to you because our office now requires it.	Input Bdays and Closing Anniversary so we can send followup emails.