



Property Address: _____ **Seller:** _____

Buyer: _____ **Selling Agent:** _____

Mutual Date: _____ **Closing Date:** _____

- ☐ Confirm mutual acceptance with selling agent by email
- ☐ Save mutual acceptance confirmation PDF for seller file
- ☐ Send copy of paperwork to seller
- ☐ Change status to Pending in NWMLS
- ☐ Print NWMLS listing PDF (Agent Detail Report - showing Pending status)
- ☐ Add selling agent contact information to database/contact list
- ☐ If using seller-requested Escrow, send Escrow contact information to selling agent
- ☐ Send purchase contract to Escrow
- ☐ FOR CONDO: Order resale certificate
- ☐ Update status on other marketing, if applicable
- ☐ Confirm Form 17 received by selling agent
- ☐ Earnest Money receipt received
- ☐ Add timelines/deadlines to online calendar
- ☐ Create purchase documents folder on computer for the listing
- ☐ Upload purchase documents to Transaction Desk for review
- ☐ Confirm that selling agent is putting up a Sold Strip (if no Sold Strip sign is up 2 weeks prior to close date, put one up)
- ☐ Notify the seller of any timelines they may need to be aware of (inspections, septic, well, etc.)
- ☐ Confirm CO alarms are installed before inspection

Pre-closing:

- ☐ Forward utility information to selling agent, if not initially on Form 22K
- ☐ Request copy of Settlement Statement from Escrow and review (typically 1-2 days before closing)
- ☐ Make sure all keys and remotes for property are in a mutually agreed upon area
- ☐ Confirm seller signing appointment with Escrow (typically scheduled directly with seller)

Post-closing:

- Enter seller's new address in database
- Add seller to 33 Touch marketing campaign

Paperwork required for transaction in Transaction Desk:

- Fully completed Purchase and Sale Agreement (Form 21 or 28)
- Seller Disclosure Statement (Form 17) signed by buyer
- Earnest Money receipt from Escrow
- Copy of Mutual Acceptance email
- MLS Printout (from Matrix)
- Form 35R, if purchase had inspection contingency
- FOR CONDO: Copy of Resale Certificate signed by buyer and seller