***Buyer Control Sheet***

**Initial Meeting:**

|  |  |  |
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|  |  | Obtain a copy of Buyer’s Pre-Approval |
|  |  | **Signed** Transaction Broker Notice (No Longer Required, suggested best practice) |
|  |  | **Signed**  Florida Building Energy-Efficiency Rating System (TECO will Audit for free 877-832-6747) |
|  |  | **Signed** Buyer Disclosure Form (Transaction Fee must be disclosed if you are charging one) |
|  |  | **Signed** Home Inspection “Why you should obtain one” (Required for FHA) |
|  |  | Review Availability of Home Warranty Accepted \_\_\_\_\_\_\_\_\_\_ Declined \_\_\_\_\_\_\_\_\_\_ |
|  |  | Offer Listing Services to Buyer Accepted \_\_\_\_\_ Declined \_\_\_\_\_ Referred to: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
|  |  | Provide Buyer with a Blank Sales Contract |

**Writing The Contract:**

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| --- | --- | --- |
|  |  | Review and Initial CMA |
|  |  | **Delivered Lead Paint Brochure (For properties older than 1978)** |
|  |  | **Signed** Lead Paint Disclosure and Delivered Lead Paint Disclosure (Homes built prior to 1978) |
|  |  | Homeowners’ Association/Community Disclosure Delivered \_\_\_\_\_\_\_\_\_\_ **Signed**  \_\_\_\_\_\_\_\_\_\_ |
|  |  | Sellers Disclosure or Vacant Land Disclosure Delivered \_\_\_\_\_\_\_\_\_\_ **Signed**  \_\_\_\_\_\_\_\_\_\_ |
|  |  | Confirm Buyer has received a “Good Faith Estimate” from their Lender |
|  |  | **Initial Deposit:** \_\_\_\_\_\_\_\_\_\_\_ ( Delivered to Escrow Agent Immediately and Escrow Verification Signed) |
|  |  | **Escrow Verification Form Complete and turned in with file** |
|  |  | Updated Buyer’s Mortgage Pre-Approval Provide Copy to Seller: \_\_\_\_\_\_\_\_\_\_ |
|  |  | **Signed Contract** |
|  |  | Additional Addenda : **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** |
|  |  | Reviewed Contract for Signatures and Initials (all pages and addenda) |
|  |  | Record Effective Date on Contract Effective Date: \_\_\_\_\_\_\_\_\_\_ |
|  |  | Deliver Executed Contracts to all parties Delivered \_\_\_\_\_\_\_\_\_\_ |
|  |  | Turn in File to the office – Start paperwork “ My Transactions”, including greensheet even if incomplete |

**Transaction Management**

|  |  |
| --- | --- |
|  | **Additional Deposit:** \_\_\_\_\_\_\_\_\_\_\_ (Initial Deposit Delivered To Escrow Agent) |
|  | Who will hold additional deposit: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (If Applicable) |
|  | Forwarded Signed Escrow Deposit Verification to all parties |
|  | Additional Deposit: Due: \_\_\_\_\_\_\_\_\_\_ Received: \_\_\_\_\_\_\_\_\_\_ or Confirmed |
|  |  |
|  | **Provide Parties with Copy of Contact Sheet with the following:** |
|  | Title Company Information |
|  | Mortgage Company Information |
|  | Appraisal Company Due: \_\_\_\_\_\_\_\_\_\_ Scheduled: \_\_\_\_\_\_\_\_\_\_ Complete: \_\_\_\_\_\_\_\_\_\_\_ |
|  | Home Inspection Company Due: \_\_\_\_\_\_\_\_\_\_ Scheduled: \_\_\_\_\_\_\_\_\_\_ Complete: \_\_\_\_\_\_\_\_\_\_\_ |
|  | **Complete Home Inspection Contingency Release Form or Contract Addendum (Monitor Repairs)** |
|  | Request: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Complete: \_\_\_\_\_\_\_\_\_\_\_ |
|  | Request: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Complete: \_\_\_\_\_\_\_\_\_\_\_ |
|  | Request: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Complete: \_\_\_\_\_\_\_\_\_\_\_ |
|  | Request: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Complete: \_\_\_\_\_\_\_\_\_\_\_ |
|  | Request: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Complete: \_\_\_\_\_\_\_\_\_\_\_ |
|  |  |
|  | **Mortgage Commitment:** Due: \_\_\_\_\_\_\_\_\_\_ Provided: \_\_\_\_\_\_\_\_\_\_\_ (Notify All Parties if Not) |
|  |  |
|  | Termite Inspection done no more than 30 days prior to closing! Completed : \_\_\_\_\_\_\_\_\_\_\_\_ Result: \_\_\_\_\_\_\_ |
|  | Title Work Complete Completed : \_\_\_\_\_\_\_\_\_\_\_ |
|  | Survey Ordered by Title Company and Provided to Buyer \_\_\_\_\_ (Contract Calls for 5 Days prior to closing) |
|  | Confirm Buyer’s Homeowner Insurance (Two Weeks Prior Especially Important during Hurricane Season) |

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***Buyer Control Sheet (Continued)***

**Closing Preparation**

|  |  |
| --- | --- |
|  | Closing Date Confirmed: Date: \_\_\_\_\_\_\_\_\_\_ |
|  | Confirm utilities have been disconnected by seller |
|  | **Provide Utility Information for Buyer** |
|  | Schedule Final Walk-Through Date: \_\_\_\_\_\_\_\_\_\_ |
|  | Review HUD for: Commission \_\_\_\_\_\_\_Credits \_\_\_\_\_\_\_Transaction fee \_\_\_\_\_\_Home Warranty \_\_\_\_\_\_ |
|  | **Signed and Complete Buyer Walk-Through Acknowledgement must be turned into the office file** |
|  | Collect Keys \_\_\_\_\_ Garage Door Openers \_\_\_\_\_ Gate Codes/Openers \_\_\_\_\_ Security Codes \_\_\_\_\_\_\_\_\_\_ |
|  | Did Listing Agent Remove? Lockbox \_\_\_\_\_\_\_\_\_\_ and Sign\_\_\_\_\_\_\_\_\_\_ |
|  | Attend Closing: Where: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
|  | When: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
|  | Confirm the following documentation or receipts are delivered to buyer: |
|  | Termite Certificate Given to Buyer: \_\_\_\_\_\_\_\_\_\_\_\_ |
|  | Home Warranty: Check for \_\_\_\_\_\_\_ from: \_\_\_\_\_\_Buyer \_\_\_\_\_\_Seller \_\_\_\_\_\_To be sent by Title Company |
|  | Confirmation Number:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Check #:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Sent by: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
|  | **Bring Check, Final Walk Through, and HUD from Title Company enter into “My Transactions”** |
|  |  |
|  | *Say “Thank You” to all parties!* |

**Post Closing**

|  |  |
| --- | --- |
|  | Send Thank-You notes to: Title Co. \_\_\_\_\_ Other Agent: \_\_\_\_\_ Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
|  | Closing Gift Ordered: \_\_\_\_\_\_\_\_\_\_\_\_\_ Delivered: \_\_\_\_\_\_\_ |
|  | Order Just Sold Postcards |
|  | Enter Customer in Database |
|  | Enter Customer in Follow-Up Program |
|  |  |
|  | *Ask for Referrals!* |
|  |  |
|  |  |

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