Buyers Purchase Checklist

Pre-purchase

Subject Property:	
Clients:	
Client contact information:	Current address:
Home Phone:	Cell: Work:
Cell: Work:	Email:
Email:	
☐ DORT Click here to enter a date.	☐ Privacy Notice/Consent Click here to enter a date.
☐ Client folder created	

Referral from/source:
AW

☐ Contact added to CRM Click here to enter a date.

☐ Categorize: past client, seller, buyer, etc.

☐ Phone #(s) ☐ Email ☐ Mailing Address

☐ Add notes (and date when note entered)

☐ Add task plans: biweekly review, completion date, listing expiring

Arrangements made for:

☐ Mortgage Broker ☐ Inspector ☐ Lawyer

☐ Buyers Package delivered/emailed Click here to enter a date.

☐ Buyers Needs Assessment completed

☐ Matrix Search set up Click here to enter a date.

☐ Auto Email ☐ Concierge Mode

Purchase

Address:

Accepted Offer: Click here to enter a date.

Completion Date: Click here to enter a date.

Subject to Date: Click here to enter a date.

Possession Date: Click here to enter a date.

Possession Time:

Adjustment Date: Click here to enter a date.

Subjects: Click here to enter a date.

Financing: Click here to enter a date.

☐ Appraisal

☐ Client received written financing approval

☐ Inspection booked for Click here to enter a date. Time:

☐ Other:

☐ DORT ☐ FINTRAC

☐ Privacy/Consent Notice ☐ DOR

☐ Final Signed CPS ☐ PDS ☐ Title

☐ Agent Mandatary (for FINTRAC if one was used)

Other:

☐ All paperwork to Skyslope®

☐ Emailed paperwork to clients

Subject Removal

☐ Prepared

☐ Signed

☐ Uploaded to Skyslope®

☐ Emailed to client

Deposit

☐ Received and delivered

☐ Copy to listing Realtor®

☐ FINTRAC Receipt of Funds prepared

☐ Copy to Skyslope®

☐ Copy to client along with copy of deposit draft

Lawyer Info

Sellers lawyer:

Contact information:

Buyers lawyer:

Contact information:

☐ Touch base with lawyer to make sure everything is in order 4 days before completion

☐ Touch base with client 1 week before completion

☐ Utility and Strata information sent to clients

☐ Arrange for cleaning

☐ Arrange for keys/manuals

☐ Meeting time for key transfer

After the Sale

☐ Thank You card (Click here to enter a date.) ☐ Mailed ☐ Delivered

☐ Thank You gift (Click here to enter a date.) Gift Type:

Notes:
