

# TRANSACTION COORDINATOR'S CHECKLIST FOR BUYERS



- Contract documents signed and uploaded
- Executed agreement (offer to purchase)
- Agreement between buyer and agent or brokerage
- Buyer's disclosure
- Proof of funds or pre-approval
- Earnest money
- Add inspector
- Add lender
- Order inspections
- Upload inspections
- Create inspection addendum
- Remove inspection contingency
- Complete agent info sheet for title
- Schedule closing
- Seller disclosure
- Signed buyer net sheet
- HOA disclosure
- CDD (Community Development District) addendum
- Lead based paint disclosure - for homes built prior to 1978
- Appraisal
- Short sale addendum
- Wire fraud prevention notice
- Ensure **MLS** marked pending
- If relo, alert relocation
- Sync with **CRM** for tracking **ROI** or future prospecting
- Send buyers links to utilities
- Home warranty
- Final walkthrough
- Complete close
- Upload **HUD**
- Order client gift as congratulations on home purchase

## PRO TIPS

Dotloop integrates easily with **Google Calendar** to alert agents and customers of upcoming deadlines and signatures needed.

You can find an automated buyer's estimate net sheet right within your dotloop account by accessing dotloop's new free **Interactive Forms and Worksheets**.

Send customers a document stored in your Tasks template with hyperlinks or URLs to utility providers' pages for easy transfer of services.

You can add your favorite title company and home warranty contacts to dotloop's **Trusted Service Providers** for easy sharing with agents and customers.