

# TRILLIUMWEST

# Buyer Offer to Close Checklist

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## OFFER TO FIRM

- Deliver deposit - certified cheque or wire transfer to listing brokerage within 24 hours or by x time.
- Get receipt of deposit and complete receipt of funds paperwork
- Send signed copy of paperwork to their lender along with MLS print out
- Recommend an Appraisal ASAP (you have to call it out otherwise they won't do it)
- Book any professionals (home inspector etc)
- Fulfill conditions (inspection, financing, insurance, septic, well etc)
  - if *satisfied* with conditions send Notice of Fulfillment
  - if *not satisfied* Amendment or Mutual Release

## FIRM TO CLOSE

- *Celebrate!*
- Send signed copy of paperwork to client
- Ask lender for earliest appraisal possible (in case of shifting market)
- Get lawyer contact information and add to paperwork
- Start a DocuSign room and upload all paperwork
- Schedule walkthroughs - ensure walk through clause allows family, contractors, tenants etc.
- Remind clients to call their insurance company
- Check in with lawyer to ensure they have paperwork and things are in order to close (2 weeks prior to closing)
- Remind clients not to make any large expenditures leading up to closing that could impact their debt serviceability
- Remind clients to set up utilities and internet in their name for closing and order final meter readings
- Book moving company especially if beg/end month
- Remind seller to leave all manuals/warranties/garage door remotes, spare keys
- Remind seller to leave mail key with box location instructions
- For condos: Register with the condo (car, themselves), condo fees and book elevator
- Final walk through - check appliances, ensure chattels included are left behind, garbage removed, no damage etc
- Grab ID for Fintrac if not already done
- Drop closing gift off

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