

Closing Plan for Buyer Client-Condominium Closing Plan

Activity	Description	Day	From	Reminder	Drop off	Assigned to
To-do	Home Inspection- confirm and record i...	0	After acceptan...	0	99	Sarah Julien
To-do	Loan Commitment - last day to recieve	0	After acceptan...	4		Sarah Julien
To-do	Purchase and Sale- last day for signing...	0	After acceptan...	3		Sarah Julien
To-do	Additional Deposit - due date (record a...	0	After acceptan...	0	99	Sarah Julien
To-do	Folder- set up Team file	0	After acceptan...	0	99	Sarah Julien
To-do	Home Inspection- final day of inspectio...	0	After acceptan...	3		Sarah Julien
To-do	Loan Application- last day for buyers to...	0	After acceptan...	2	99	Sarah Julien
To-do	First Deposit Check- make 3 copies	0	After acceptan...	0	99	Sarah Julien
To-do	Purchase and Sale- signed by Buyers ...	0	After 'Purchas...	0		Sarah Julien
To-do	Purchase & Sale- distrubute fully execu...	0	After 'Purchas...	0	99	Sarah Julien
To-do	First Deposit Check- submitted to listin...	1	After acceptan...	0	99	Sarah Julien
To-do	Recommendations for Buyers- receive...	1	After acceptan...	0	99	Sarah Julien
To-do	Buyer Client Fee Invoice- received fully...	1	After acceptan...	0	99	Sarah Julien
To-do	Discuss Recruiting Plan regarding co b...	1	After acceptan...	0	99	Sarah Julien
To-do	Home Warranty Application- received f...	1	After acceptan...	0	99	Sarah Julien
To-do	Bluesheet- complete	1	After acceptan...	0		Sarah Julien
To-do	Inspection Facts for Consumers- receiv...	1	After acceptan...	0	99	Sarah Julien
Letter	Send Letter - OFFER ACCEPTED BU...	1	After acceptan...	0	99	Sarah Julien
Call	Introduction call to buyers by Transacti...	1	After acceptan...	0		Sarah Julien
To-do	MCA Checklist- copy for Team files	1	After acceptan...	0	99	Sarah Julien
To-do	Lead Paint Disclosure- received fully si...	1	After acceptan...	0	99	Sarah Julien
To-do	Seller's Statement- received fully signe...	1	After acceptan...	0	99	Sarah Julien
To-do	Check Referral Status and Plan Imple...	1	After acceptan...	0		Sarah Julien
To-do	Agency Disclosure- received fully signe...	1	After acceptan...	0	99	Sarah Julien
To-do	Dual Agent Agreement- received fully s...	1	After acceptan...	0	99	Sarah Julien
To-do	Important Dates- create and send with l...	1	After acceptan...	0	99	Sarah Julien
Call	Property Status Update- call Buyers	1	After 'Home In...	0	99	Sarah Julien
Call	Property Status Update- call Buyers	1	After 'Loan Co...	0	99	Sarah Julien
Letter	Send Letter - HAVE LOAN COMMITM...	1	After 'Loan Co...	0	99	Sarah Julien
To-do	Loan Commitment Letter- obtain copy	1	After 'Loan Co...	0		Sarah Julien
To-do	Bluesheet- copy and submit to MCA	0	After 'Blueshee...	0	99	Sarah Julien
To-do	Loan Contingencies- check any conting...	0	After 'Loan Co...	0	99	Sarah Julien
Call	Loan Officer - call for progress report a...	1	After 'Purchas...	0	99	Sarah Julien
Call	Property Status Update- call Buyers	1	After 'Purchas...	0	99	Sarah Julien
To-do	Purchase and Sale- received from listin...	2	After acceptan...	0		Sarah Julien
To-do	Condominium Documents- obtain full s...	2	After acceptan...	0	99	Sarah Julien
To-do	Personal thank you note to buyers by T...	1	After 'Introducti...	0	99	Sarah Julien
To-do	Notice of Buyer Representation- incorp...	0	After 'Purchas...	0	99	Sarah Julien
To-do	Purchase and Sale- review for accurac...	0	After 'Purchas...	0	99	Parisella, Jason
To-do	Buyer Due Diligence Checklist- receive...	7	After acceptan...	0	99	Sarah Julien
To-do	Additional Deposit- received from Buyers	10	After acceptan...	0		Sarah Julien
To-do	Additional Deposit- submit to listing office	0	After 'Additiona...	0	99	Sarah Julien
To-do	Additional Deposit- make copy of check	0	After 'Additiona...	0	99	Sarah Julien

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Activity	Description	Day	From	Reminder	Drop off	Assigned to
To-do	Closing Date	0	Before closing ...	4	99	Sarah Julien
To-do	Buyer to Sign Waiver For Final Walkthr...	1	Before closing ...	0	99	Sarah Julien
To-do	Final Buyers Walk Through- confirm an...	1	Before closing ...	3	99	Sarah Julien
To-do	Obtain updated contact information fro...	1	Before closing ...	0	99	Sarah Julien
To-do	HUD Settlement Statement- obtain and...	2	Before closing ...	0	99	Sarah Julien
To-do	Commission Statement- prepare	3	Before closing ...	0	99	Sarah Julien
To-do	Gas Company - Buyers: call to begin s...	5	Before closing ...	0	99	Sarah Julien
To-do	Coordinate Home Warranty with Closin...	5	Before closing ...	0	99	Sarah Julien
To-do	Submit Revised Bluesheet to MCA	5	Before closing ...	0	99	Sarah Julien
To-do	Checkbook and Identification - Buyers: ...	5	Before closing ...	0	99	Sarah Julien
To-do	Buyer Client Fee- remind buyers of add...	5	Before closing ...	0	99	Sarah Julien
To-do	Closing Request - submit to MCA	5	Before closing ...	0	99	Sarah Julien
To-do	Bank Check - Buyer: call closing attorn...	5	Before closing ...	0	99	Sarah Julien
To-do	Review Bluesheet For Changes	5	Before closing ...	0	99	Sarah Julien
To-do	Oil Adjustment - discuss with buyers*	5	Before closing ...	0	99	Sarah Julien
To-do	Electric Company - Buyers: call to begi...	5	Before closing ...	0	99	Sarah Julien
To-do	Condo Master Insurance Certificate- c...	5	Before closing ...	0	99	Sarah Julien
To-do	Closing Date- confirm and record in ap...	7	Before closing ...	0	99	Sarah Julien
Letter	Send Letter to co-broke*	1	After closing d...	0		Sarah Julien
To-do	Sold Sign - Place on property*	1	After closing d...	0		Parisella, Jason
To-do	Closed Sales Spreadsheet- update	1	After closing d...	0	99	Sarah Julien
To-do	Update Team Sold Spreadsheet	1	After closing d...	0		Sarah Julien
To-do	*Mailing - send Just Sold*	1	After closing d...	0	99	Sarah Julien
To-do	Survey - send to Buyers	1	After closing d...	0	99	Sarah Julien
To-do	LP/SP Buyers Ratio Sheet - add proper...	2	After closing d...	0	99	Sarah Julien
To-do	Delete All Word Documents Pertaining ...	2	After closing d...	0	99	Sarah Julien
To-do	Commission Check - verify amount	5	After closing d...	0		Sarah Julien
Letter	Send Thank You Letter	7	After closing d...	0		Sarah Julien
Letter	Send MREA book with letter to co-broke*	7	After 'Send Let...	0		Sarah Julien
To-do	Commission Check - deposit into Team...	5	After 'Commiss...	0		Sarah Julien
To-do	After Sale Gift - order and send to Buy...	7	After 'Send Th...	0		Sarah Julien
To-do	Sold Sign - remove from property	14	After 'Sold Sig...	0	99	Parisella, Jason
Call	Recruiting call to cobroke	10	After 'Send MR...	0	99	Parisella, Jason
Call	Follow-up Call - Everything okay?	10	After 'After Sal...	0		Parisella, Jason
To-do	Closing Plan - print final reports and no...	1	After 'Follow-u...	0		Sarah Julien
To-do	Contact Records- update buyer & selle...	1	After 'Closing ...	0		Sarah Julien
To-do	Perform Tranfer Property function*	1	After 'Closing ...	0		Sarah Julien
To-do	Contact Records- approve updates	1	After 'Contact ...	0		Parisella, Jason
To-do	Closing Plan- delete	1	After 'Contact ...	0		Sarah Julien
To-do	Folder - condense and submit to MCA	1	After 'Closing ...	0	99	Sarah Julien