



BUYER PROCESSING CHECKLIST

Tamara Suminski, REALTOR®
BRE#01472334

CLIENTS INFORMATION

Name _____

Address _____

CELL _____ CELL _____

EMAIL _____ EMAIL _____

Appointment date: _____ Thank you for appt. letter sent _____ Date: _____ Gift: _____

Offer Accepted: _____ Contingency Removals: _____

MLS #: _____ Escrow #: _____

COE: _____

OFFICE TO DO'S

_____ Start Client File Date: _____

_____ Buyer Needs and Considerations Form Date: _____

_____ Log Client info into Database

Excel Sphere ___ H1 ___ Google Contacts _____ Date: _____

_____ Buyer Representation Agreement (BRE) Date: _____

_____ Market Conditions (MCA) Date: _____

_____ Agency Disclosure (AD) Date: _____

_____ Disclosure to Represent More than One Buyer/Seller Date: _____

_____ Add to Marketing Campaign Date: _____

_____ Input Auto-search in MLS Date: _____

_____ Add to Office Listings Date: _____

DISCLOSURES

_____ Prepare Disclosures for Tamara to give to buyers Date: _____

___ AVID ___ SBSA ___ Receipt for Environmental Haz. Book

PENDING

_____ Send Open Escrow Email _____ Print Copy Date: _____

_____ Send File to TC Date: _____

___ Harcourts Foundation (\$___) ___ Children's Hospital (\$___) ___ Sebastian (\$200) ___

___ Referral Check (if any) (\$___) _____ Date: _____

___ Review Disbursement Sheet Date: _____

___ Send Buyer's home warranty info. (Suzy Pelshaw: <http://www.homewarranty.com>) Date: _____

___ Print Just Opened Escrow Letter Date: _____

___ Request 3-up labels for owner occupied & (owners to their mailing address if not occupied)
from Title Date: _____

___ Request excel sheet from Title for mail merge Date: _____

___ Add excel sheet into database and/or Master _____ Farming Date: _____

Details: _____

beachrealestategal.com

BUYER PROCESSING CHECKLIST

_____ Send out Just Opened Escrow Letter Date: _____

SOLD

_____ Sold date _____ Attach all checklists and marketing timelines Date: _____

_____ Copy of Closing Statement in Escrow & Lender in Dropbox Date: _____

_____ Order 500 Just Sold Post cards Date: _____

_____ Request same 3 up labels from Just Listed Postcards & Just Removed Contingencies notes for
Just Sold Post Cards Date: _____

_____ Send out Post cards Date: _____

Post cards: \$ Postage: \$

_____ Closing Gift Amount: \$ Detail: _____ Date: _____

_____ Receipt for Gift in Folder

_____ Fill out QSC Excel Request

Subject "QSC Survey Submission Form | Tamara Suminski" to Info@qualitycertified.org

To check: Sign In: tamarasuminski Password: _____ Date: _____

_____ Buyer's new address: _____

Excel Sphere ___ H1s ___ Google Contacts ___ Date: _____

_____ **BUYERS ONLY:** 10 days before close: LowesRealtorBenefits.com & Gift Center Date: _____

_____ Copies of ALL checks from escrow

_____ Harcourts Foundation (\$___) _____ Children's Hospital (\$___) _____ Sebastian (\$200) _____

_____ Referral Check (if any) (\$___) _____ Date: _____

_____ Close out file Date: _____

_____ Clean-up Dropbox Date: _____

_____ Send donation form & check to Children's Hospital (Copy of form) Date: _____

_____ Send Thank you letter **1st Week** Date: _____

_____ Copy of Closing Statement for Annual File Date: _____

_____ Keys delivered to Buyer w/keychain _____ Date: _____

_____ Copy & Mail/Deliver CD file (Always make CD easy & neat for clients) Date: _____

_____ Gift to Referrer Name & Gift: _____ Date: _____

Amount: \$ Details: _____

_____ **2nd Week** Follow up and Offer Housewarming (Follow Housewarming Checklist) Date: _____

WEBSITE

_____ Add to beachrealestategal.com as "Sold" Date: _____

NOTES: