

Transaction Details:

- Introduction Sent to Agent: _____
- Introduction to Lender: _____
- Contract sent to Lender: _____ Title: _____
- If Cash: Introduction Sent to Title Company: _____
- Introduction Sent to Buyer/Seller: _____
- Realtor Info Sheet: Received _____ Sent _____
- Skyslope: List: _____ Buy _____
- Review file in Dotloop: _____
- Enter listing into, Cincy _____ Dayton, _____
- Mark pending in MLS _____
- Write on board List: _____ Buy _____
- Collect inspection repair item receipts _____ Add to Dotloop _____
- Send Utilities list to client. _____
- Schedule Closing _____
- Prep for closing email: _____
- Send closing email _____
- Order Home Warranty _____ Mail Home Warranty _____
- Disbursement sheet in Skyslope _____
- Final settlement email: _____
- Send CDA to title: _____
- Save settlement/ Alta in dotloop _____
- Add to Excel – COE: _____
- Add to Excel – OAR: _____
- Add to KVcore _____
- Change to SOLD and close out MLS Cincy and Dayton _____
- Submit check and Settlement Statement to Skyslope _____
- Send closing picture and info to _____
- Verify Listing agent closed properly _____

Contract Dates/Deadlines:

- Contract Acceptance Date: _____
- EM Due _____
- HOA Docs _____
- Inspection Date: _____
- Inspection Period Ends: _____
- Inspection Consideration Period: _____ days
- Inspection Settlement Period: _____ days
- Appraisal: _____
- Loan Application & Intent to Proceed due: _____
- Loan Conditional Approval due: _____
- Loan Approval (Clear to Close) due: _____
- Anticipated Closing Date: _____
- Occupancy Date: _____