

# Buyer's Checklist

## 1. Early-Phase Buyer's Agent Checklist

- Ask if your prospective buyers have a home they need to sell
- Provide a Buyer's Guide to your prospective buyers
  - How to get pre-approved\* for a mortgage
  - What to pay special attention to during the house hunt
  - What to expect during escrow
- Get your clients pre-approved
- Get your clients to commit via the Buyer Representation Agreement

## 2. House-Hunt Checklist

- Get the prospective buyer's details, including their search criteria
- Help your clients keep track as they tour prospective homes
  - Home Tour Checklist from Total Expert

## 3. Buyer's Agent Checklist for Making an Offer

- Let the listing agent know an offer is coming
- Review MLS report for instructions on submitting offers
- Complete a quick CMA
- Draft the offer documents
- Provide instructions for buyer to wire earnest money deposit AND OPTION FEE
- Create "Under Contract" and "Just Sold" social media posts in Total Expert. Post the "Under Contract" marketing piece

*Contact me today to learn more!*

## 4. Buyer's Agent Checklist: Contract-to-Close

- Open escrow
- Schedule the home inspection(s)
- Order any surveys, if needed
- Order the appraisal
- Order the title search
- Confirm the status of the loan funding
- Review the inspection with buyers
- Have the buyers arrange homeowners insurance
- Have the buyers review the settlement statement
- Schedule the final walkthrough
- Remind the buyers to transfer utilities to the new home
- Confirm clear-to-close with the lender
- Attend closing, if necessary
- Give your buyers their keys
- Collect your commission

## 5. Post-Close Checklist

- Give a thoughtful closing gift
- Ask for an online review
- Post "Just Sold" piece on social media
- Follow up after three days to see if your buyers have questions
- Ask for referrals
- Add to your ongoing client base marketing campaigns
- Add to calendar/task one-year anniversary card/gift, homestead exemption



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