Showing Process Checklist

Buyer Pre-Screening & Initial Setup

- Determine if the potential buyer is already working with an agent.
- Provide the Real Estate Disclosure Notice [501] and upload licensee confirmation.
- Discuss the buyer's search preferences and criteria, then set up their MLS portal.
- Provide the Inspections & Investigations Advisory [102], which includes lender/service provider recommendations if needed.
- Request a pre-qualification letter from the buyer.
- Email the Buyer Representation Agreement [503] and Foundation Advisory [506] for electronic signing.
- Provide the "Protect Your Family From Lead in Your Home" pamphlet if applicable [103].
- If the buyer prefers, bring hard copies of documents for signatures instead of using email.
- Have the buyer sign the Unrepresented Persons Notice [502], if applicable.

Property Showings & Offer Preparation

- Schedule and conduct property viewings.
- Explain dual agency [504] and designated agency [505] to the buyer and secure consent if necessary.
- Present comparables and discuss potential offer terms.
- Distribute property disclosures to the buyer via email for review.
- Notify the listing agent about an offer being prepared.
- Inquire about multiple offers and any submission deadlines.

Offer Documentation & Submission

- Prepare and have the buyer sign all required purchase forms, including:
- Dual Agency Consent Agreement [504]
- Dual-Designated Agency Consent Agreement [505]
- Lead Paint Disclosure (provided by seller)
- Concrete Advisory & Disclosure for Sellers & Buyers (provided by seller)
- Residential Property Condition Report (provided by seller)
- Purchase & Sale Agreement [507]
- Inclusions/Exclusions (provided by seller)
- As-Is Rider [525]
- Escalation Rider [517]
- Appraisal Rider [548]
- FHA Rider [544]
- VA Rider [543]
- Common Interest Community Rider [508]
- Solar Panel Rider (if not provided by seller) [516]
- Hubbard – Sale of Buyer's Property (Not Under Deposit) [510]
- Sale of Buyer's Property Rider [513]
- Obtain and submit the pre-qualification letter with the offer.
- Email the offer package to the listing agent and confirm receipt.
- Create a transaction in RBO, including dates, contacts, and uploaded documents.
- Complete all tasks in RBO.

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Showing Process Checklist

Post-Offer & Contract Management

- Deliver the earnest money deposit to the listing agency.
- Request Common Interest Community Documents, if applicable.
- Facilitate buyer's acknowledgment of receipt for the Common Interest Community Documents [509].
- Assist the buyer in scheduling inspections and inform the agent accordingly.
- Monitor and adhere to all contractual deadlines.
- Confirm the appraisal appointment with the listing agent.
- Check the progress of the buyer's mortgage application with the lender.
- Attend inspections and, if necessary, prepare the Unsatisfactory Repair Remedy [520] for negotiation.
- Notify the buyer's attorney once inspections are completed.
- If needed, draft an amendment for closing cost credits based on inspections [559].
- Ensure all necessary documents are provided to the attorney and lender.
- Create the commission invoice (RBO - Commission Demand) and send it to the buyer's attorney.
- Monitor the mortgage commitment progress and request extensions if needed.
- Obtain and upload repair invoices to RBO.
- Secure the mortgage approval letter and distribute it to relevant parties.
- Create a commission request for agent payment (split) in RBO.

Closing & Post-Closing Follow-Up

- Arrange the final walkthrough and notify the agent.
- Obtain the buyer's signature on the Pre-Closing Inspection form [533].
- Coordinate key handover after closing.
- Deliver the commission check or arrange for mailing to the office.
- Verify completion of all tasks in RBO and upload relevant communications.
- Follow up with the buyer at 30, 60, and 90 days after closing.
- Add the buyer to the Sphere of Influence (SOI) list for ongoing communication and support.

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