Offer Checklist

Pre-Offer Preparation - (Representation and buyer presentation should be done)

- ☐ Buyer(s) questions
- ☐ Open the line of communication with Mortgage Specialist
- ☐ Review MLS listing and attachments
- ☐ Initial call to listing agent to ask questions
- ☐ Research - Print Property Line Report
- ☐ Research - Print Geowarehouse Report
- ☐ Research - Check municipal and area influences
- ☐ Research - Mini Market Analysis
- ☐ Communicate with Buyer(s) to review construction of offer and presentation Strategy - Conditions, Inclusions, Irrevocable, etc.

Construct Offer and Supporting documents

- ☐ VirtualOffer.ca to help - Input information
- ☐ Login to Skyslope - Select Template
- ☐ RECO Brochure and Representation Should already be done
- ☐ Form 801
- ☐ Confirmation of Representation - Agency & Commission
- ☐ Construct your Agreement of Purchase and sale
- ☐ Review and add listing brokerage Schedule “B”
- ☐ Review with your Buyer
- ☐ Get your signatures and initials
- ☐ Fintracker done on individual(s)

- [ ] Register the Offer - Request confirmation

Presentation of offer

- [ ] In-person if possible
- [ ] Submit offer - Explain strengths
- [ ] Negotiate offer - In writing
- [ ] Offer acceptance - Review Agreement
- [ ] Deliver complete documents to Client
- [ ] Arrange deposit delivery - Receipt & FINTRAC Receipt of Funds

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After Acceptance

- [ ] Sales Information Sheet
- [ ] Book Home Inspector
- [ ] Communicate with Mortgage Specialist
- [ ] Schedule dates in calendar -Home Insp - condition expiry - check in - closing
- [ ] Facilitate fulfillment of conditions & terms
- [ ] Submit any additional documents to brokerage
- [ ] Notification weekly on outstanding paperwork
- [ ] Verify & sign trade record sheet
- [ ] Weekly check-in
- [ ] Assist client and listing agent until closing
- [ ] Post Sale Moving Checklist - After Firming Up

Closing Day & Beyond

- ☐ Make notes in CRM
- ☐ Schedule an Occasion - Home Anniversary in CRM
- ☐ Verify successful closing
- ☐ Advise client to immediately check property condition, chattels & fixtures
- ☐ Enter notes and anniversaries in CRM

PDF Download - Offer Checklist

Revision #2
Created 7 April 2025 12:33:47 by Eryn Richardson
Updated 7 April 2025 12:39:58 by Eryn Richardson