

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
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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
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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

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