

Closing Plan for ***Buyer Closing Plan

Activity	Description	Day	From	Reminder	Drop off	Assigned to
To-do	Proof all Paper Work for Completion	0	After acceptan...	0		CathyHoffer
To-do	Make Sure We Have Pre-approval Lett...	0	After acceptan...	0		CathyHoffer
To-do	Enter Closing Date in TP + All Parties t...	0	After acceptan...	0	14	CathyHoffer
To-do	Order Warranty (if applicable) Put Conf...	0	After acceptan...	0		CathyHoffer
To-do	Put Post Inspection Deadlines in TP un...	0	After acceptan...	0	30	CathyHoffer
To-do	Mark Pending in OUR Listings Noteboo...	0	After acceptan...	0	15	CathyHoffer
To-do	Make a Copy of Earnest Money check/...	0	After acceptan...	0		CathyHoffer
To-do	Is a Well, Septic or City Inspection Nee...	0	After acceptan...	0	20	CathyHoffer
Email	Introduce Client Care Managers	0	After acceptan...	0		CathyHoffer
To-do	Send a post card to introduce Client Ca...	1	After acceptan...	0		Cathy Hoffer
Email	Inspection Instruction letter to client	1	After acceptan...	0		CathyHoffer
Call	Ask lender to use one of our Title comp...	1	After acceptan...	0	20	CathyHoffer
Call	Inspections: Follow up, make sure clien...	3	After acceptan...	0	30	CathyHoffer
To-do	Inspections: Submit Post Inspection Ag...	7	After acceptan...	0		CathyHoffer
To-do	Enter Title Company Info and any other...	7	After acceptan...	0	15	CathyHoffer
Call	Lender: Confirm appraisal ordered and ...	10	After acceptan...	0	90	CathyHoffer
Call	Inspections: Check on Sellers respons...	7	After 'Inspectio...	0	90	CathyHoffer
Call	Closing Statement: Call Buyer & Review	1	Before closing ...	0	90	Julie Beall
Call	Closing Statement: Confirm inspection ...	1	Before closing ...	0	7	CathyHoffer
To-do	Closing Statement: Confirm HOA dues	1	Before closing ...	0	90	CathyHoffer
To-do	Closing Statement: Confirm commisions	1	Before closing ...	0	90	CathyHoffer
To-do	Closing Statement: Confirm home warr...	1	Before closing ...	0	7	CathyHoffer
To-do	Closing Statement: Forwarded to Buyer	1	Before closing ...	0	7	CathyHoffer
To-do	Closing Statement: Confirm purchase p...	1	Before closing ...	0	90	CathyHoffer
To-do	Closing Statement: Confirm address	1	Before closing ...	0	90	CathyHoffer
To-do	Add client to Facebook Account	1	Before closing ...	0		Applied Person
To-do	Closing Statement: Confirm county taxes	1	Before closing ...	0	90	CathyHoffer
To-do	Closing Statement: Closing Costs	1	Before closing ...	0	90	CathyHoffer
To-do	Closing Statement: Confirm repair costs	1	Before closing ...	0	7	CathyHoffer
To-do	Closing Statement: Confirm marital stat...	1	Before closing ...	0	90	CathyHoffer
To-do	Buyer Closing Packet: Home warranty ...	2	Before closing ...	0	90	CathyHoffer
To-do	Title Co.: Closing Info Sheet-Inspection...	2	Before closing ...	0	7	CathyHoffer
To-do	Title Co.: Closing Info Sheet-Earnest m...	2	Before closing ...	0	7	CathyHoffer
To-do	Title Co.: Closing Info Sheet-Commissi...	2	Before closing ...	0	7	CathyHoffer
To-do	Lender: Confirm appraisal completed	2	Before closing ...	0	90	CathyHoffer
To-do	Make 2 Copies of Final Paperwork (1 f...	3	Before closing ...	0	16	CathyHoffer
To-do	Request Earnest Money Check from of...	3	Before closing ...	0	90	CathyHoffer
Email	Title Insurance can be confusing	6	Before closing ...	0		CathyHoffer
To-do	Schedule Closing: Conference room	7	Before closing ...	0	90	CathyHoffer
Email	Closing Invitation	7	Before closing ...	0		Cathy Hoffer
To-do	Letter: Attach map to closing with clesi...	7	Before closing ...	0	90	CathyHoffer
To-do	Title Co.: Closing Info Sheet-POA need...	7	Before closing ...	0	7	CathyHoffer
To-do	Pre-Closing Reminder: Client will need ...	7	Before closing ...	0	7	CathyHoffer

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Call	Call our Buyers Agent: Schedule final ...	7	Before closing ...	0	90	CathyHoffer
Call	Request Receipts for Repairs From Po...	7	Before closing ...	0	90	CathyHoffer
Email	Pre-Closing Client Reminders	7	Before closing ...	0		CathyHoffer
Email	Moving Checklist	14	Before closing ...	0		CathyHoffer
To-do	Title Co.: Closing Info Sheet - Complet...	14	Before closing ...	0	7	CathyHoffer
To-do	Title Co.: Submit Closing Info sheet	14	Before closing ...	0	7	CathyHoffer
Call	Schedule Closing: Call Co-Op Agent/S...	15	Before closing ...	0	90	CathyHoffer
To-do	Call: Client follow up	15	Before closing ...	0	90	CathyHoffer
To-do	After closing record information from bl...	0	After closing d...	0		CathyHoffer
To-do	Co-Op Agent: Arrange for buyers to get...	0	After closing d...	0	90	Julie Beall
To-do	After Closing: Submit closing file to Offi...	1	After closing d...	0	90	CathyHoffer
To-do	Letter: Send tax letter January 15th	1	After closing d...	0	90	CathyHoffer
To-do	TP Action: Change buyer status	1	After closing d...	0	90	CathyHoffer
To-do	Set Up 10 Year Plan	1	After closing d...	0		CathyHoffer
To-do	After Closing: Copy Settlement Statem...	1	After closing d...	0		CathyHoffer
To-do	Ask Julie About Ordering a Personalize...	1	After closing d...	0		CathyHoffer
To-do	TP Action: Rotate address in database	1	After closing d...	0	90	CathyHoffer
To-do	Pick Up Sign & Lockbox	2	After closing d...	0		CathyHoffer
Email	Thank Co-Op agent	2	After closing d...	0	90	CathyHoffer
To-do	Create Market Snapshot for buyer on h...	3	After closing d...	0		CathyHoffer
To-do	After Closing: Receive commission che...	3	After closing d...	0	90	Julie Beall
To-do	After Closing: Quantum Mail -Just sold ...	4	After closing d...	0	90	CathyHoffer
Email	Thank Buyer	7	After closing d...	0	90	CathyHoffer
Letter	Letter: New address labels attached to ...	14	After closing d...	0	90	Cathy Hoffer