

Property Address _____

File Number _____ Date Opened _____

SERVICING YOUR LISTING BEFORE THE SALE

DATE COMPLETED

ACTIVITIES/DISCLOSURE

_____ Market analysis & other pre-listing activities.
_____ List features & amenities of property. Create suggestions for property preparation & repairs.
_____ Order property profile: Is Seller Individual? Multiple Sellers? Trustee? Executor/Administrator?
_____ If Property in Trust, obtain copy trust document; If Probate Sale, does Seller have authority to sell? (Court Order?) If Power of Attorney, see document.
_____ Give Seller "Residential Listing Agreement" (Form RLA-exclusive or RLAA-agency or RLAN-open). If Multiple Sellers, did you get all signatures on listing contract? Prepare "Estimated Seller's Proceeds" (Form ESP). Verify Loan Information/Short Payoff.
_____ Give Seller "Disclosure Regarding Real Estate Agency Relationships" (Form AD), the C.A.R. "Property Transaction Booklet," and the "Consumer Guide to Disclosure Requirements for Sellers."
_____ Have Seller complete "Real Estate Transfer Disclosure Statement" (Form TDS).
_____ **For TDS, consider additional issues:** Lot size, Square footage? (from prior appraisal? from assessor's office? from original plans? Include a statement to the effect that this information has not been personally verified by the listing broker). Death on property within last 3 years? Flood disaster insurance? Mello-Roos district? (Seller to request form from local taxing agency) Any City/County Disclosures? Any Prior Inspection Reports? Any Other Material Facts Regarding the Property? Radon Gas? Mold Problem? If so, use "Radon Gas and Mold Notice and Release Agreement" (Form RGM) Industrial Use Zone? (Form SSD). **Seller Must Disclose All Material Facts!**
_____ Keysafe/Lock Box Authorization (Form KLA), Obtain Key from Seller (if applicable, obtain tenant approval).
_____ Install Lock Box/Place FOR SALE sign on the property.
_____ Prepare listing information sheet. Place listing on MLS; Check MLS listing for accuracy! If applicable, have Seller complete "Seller Instruction to Exclude Listing From the Multiple Listing Service (Form SEL).
_____ Prepare classified ads, brochures and promotional flyers.
_____ Set up broker's caravan and open house.
_____ Have Seller complete "Seller's Affidavit of Nonforeign Status and/or California Withholding Exemption (Form AS).
_____ Water Heater Braced? Have Seller complete "Water Heater Statement of Compliance" (Form WHS)
_____ Smoke Detectors? (Check local law for compliance) If Property is a Single-Family Home or Factory-Built Housing have Seller complete "Smoke Detector Statement of Compliance" (Form SDS)
_____ Give Seller the "Combined Hazards Book" (Includes the The Homeowner's Guide to Earthquake Safety, Environmental Hazards: Guide for Homeowners and Buyers, and Protect Your Family From Lead in Your Home). Have Seller complete "Lead-Based Paint and Lead-Based Paint Hazards Disclosure, Acknowledgement and Addendum for Pre-1978 Sales" (Form FLD). Give Seller The Commercial Property Owner's Guide to Earthquake Safety, if Property built of cinder blocks or bricks (non-frame) construction.
_____ Tenants to Remain in Property? Request Estoppel Certificate from tenants (Form TEC)
_____ Does Seller want to exchange property as a 1031 exchange? Have Seller complete "Seller Intent to Exchange Supplement" (Form SES) - Give this to prospective buyer's agent to incorporate into purchase offer.
_____ NATURAL HAZARD ZONES - Have Seller complete the "Natural Hazard Disclosure Statement" (Form NHD) or order a substituted report from a private company.
_____ Property is in an Earthquake Fault Zone?
_____ Property is in a Flood Hazard Area (Zone A or V)? Area of Potential Flooding?
_____ Property is in a Seismic Hazard Zone?
_____ Property is in a State Responsibility (Fire) Area?
_____ Property is in a Very High Fire Hazard Severity Zone?
_____ COMMON INTEREST DEVELOPMENT (e.g., condo)? Get Copies of Articles of Incorporation, Bylaws, CC&Rs, Current Financial Statement, Minutes of Meetings, Other Association Documents. If necessary, have Seller complete "Homeowner Association Information Request" (Form HOA)
_____ New Subdivision Property? Get Copy of Public Report (Conditional, Preliminary, or Final). If applicable, have Seller complete "New Construction Property Disclosure Statement" (Form NCDS)

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SERVICING YOUR LISTING DURING THE ESCROW PERIOD

DATE COMPLETED

ACTIVITIES/DISCLOSURE

_____ Be sure Residential Purchase Contract, any applicable Contract Addenda (e.g., "Contingency for Sale or Purchase of Other Property - Form COP, "Interim Occupancy Agreement (Buyer in Possession Prior to Close of Escrow) - Form IOA, "Purchase Agreement Addendum - Form PAA, "Residential Lease After Sale (Seller in Possession After Close of Escrow) - Form RLAS, "Wood Destroying Pest Inspection and Allocation of Cost Addendum - Form WPA) and all Counter Offers (Form CO) are signed/initialed by all parties.

_____ Buyer's Good Faith Deposit Check - Log into Trust Account Transaction Log - Broker Trust Account? Escrow?

_____ Deliver all the above forms (purchase contract and all addenda) to Escrow.

_____ Give the Buyer the completed "Transfer Disclosure Statement" (Form TDS).

_____ Give the Buyer the "Combined Hazards Book" and the completed "Lead-Based Paint and Lead-Based Paint Hazards Disclosure, Acknowledgement and Addendum for Pre-1978 Sales" (Form FLD).

_____ Give Buyer the "Property Transaction Booklet." Obtain a signed copy of the "Disclosure Regarding Real Estate Agency Relationships" (Form AD) signed by the Seller and the Buyer's Agent.

_____ Report Sale to Broker/Manager. Report Sale to MLS as Pending.

_____ Buyer's Increased Deposit? Have Buyer Complete "Receipt for Increased Deposit/Liquidatd Damages" (Form RID)

_____ Obtain Buyer's loan prequalification. Report/Letter Delivered to Seller? _____

_____ Order Preliminary (Title) Report. Report Delivered to Buyer? _____

_____ Order Structural Pest Control Inspection. Report Delivered to Buyer? _____

_____ Receive Pest Control Certification Report. Report Delivered to Buyer? _____

_____ Order City/County Retrofit Report, if applicable. Report Delivered to Buyer? _____

_____ Buyer's "Request for Repair" (Form RR)? Report Delivered to Seller? _____

_____ Have Seller Give Written Response. Report Delivered to Buyer? _____

_____ Subsequent Repair on Property? Report Delivered to Buyer? _____

_____ Seller Financing? "Seller Financing Addendum and Disclosure" (Form SFA) to be completed by Buyer's Agent.

_____ Have Seller complete "Notice to Buyer to Perform" (Form NBP) if Buyer has not timely removed contingencies.

_____ Receive Lender Approval? 1TD _____ 2TD _____

_____ Loan documents sent to Escrow/Title.

_____ Buyer's final verification of property condition performed. Have Buyer complete "Verification of Property Condition" (Form VP)

_____ ALL DISCLOSURE BOOKLETS/FORMS GIVEN TO BUYER? Signed Receipts?

Can use "Receipt for Reports (Form RFR) to obtain signed acknowledgments from Buyer. (Use Checklist Provided On Next Page of Folder)

FOR YOUR LEGAL PROTECTION
Document All Telephone and Personal Conversations
Related to the Transaction

