

Ultimate Transaction Coordinator Checklist

Master checklist with 50+ critical tasks for every real estate transaction from contract to close

✓ Checklist ✓ Process ✓ Organization

High Priority - Critical Tasks	Medium Priority - Important Tasks	Low Priority - Recommended Tasks
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 **Contract to Close Timeline Overview**

Days 1-3: Contract Execution & Initial Setup

Critical foundation tasks that set the tone for the entire transaction

Days 4-10: Due Diligence Period

Inspections, appraisals, and buyer contingency management

Days 11-21: Financing & Documentation

Loan processing, title work, and document preparation

Days 22-30: Final Preparations & Closing

Final walkthroughs, closing coordination, and post-closing tasks



Days 1-3: Contract Execution & Initial Setup

Contract Processing

- ☐ Review executed contract for completeness and accuracy
- ☐ Verify all required signatures and initials are present
- ☐ Confirm contract dates and deadlines
- ☐ Upload contract to transaction management system
- ☐ Create transaction timeline with all critical dates
- ☐ Set up automated reminders for key deadlines

Communication Setup

- ☐ Send contract confirmation to all parties
- ☐ Establish communication protocols with agents
- ☐ Create contact database with all transaction parties
- ☐ Set up group communication channels if needed
- ☐ Send introduction email to all parties

Initial Disclosures & Documents

- ☐ Order title commitment and preliminary title report

☐ Request property disclosures from seller

☐ Verify earnest money deposit receipt

☐ Order HOA documents (if applicable)

☐ Request survey and property reports

Days 4-10: Due Diligence Period

Inspection Coordination

☐ Schedule property inspection with buyer's inspector

☐ Coordinate access for inspection

☐ Follow up on inspection report delivery

☐ Schedule any additional inspections (pest, HVAC, etc.)

☐ Track inspection contingency deadlines

☐ Provide inspection report to relevant parties

Appraisal Management

☐ Confirm appraisal has been ordered by lender

☐ Schedule appraisal appointment

☐ Ensure property access for appraiser

☐ Follow up on appraisal completion

☐ Review appraisal results when received

Loan Processing Support

☐ Confirm loan application submission

☐ Verify borrower has provided required documentation

☐ Check on loan processing milestones

☐ Coordinate with lender for any additional requirements

☐ Request loan status updates

Days 11-21: Financing & Documentation

Title & Escrow

☐ Review title commitment for issues

☐ Address any title exceptions or problems

☐ Confirm escrow/closing company selection

☐ Provide required documents to title company

☐ Verify property taxes and assessments

☐ Order owner's title insurance policy

Loan Finalization

☐ Confirm loan approval status

☐ Review loan conditions and requirements

☐ Ensure all loan conditions are satisfied

☐ Verify loan terms match contract

☐ Confirm loan funding timeline

Documentation Preparation

☐ Prepare closing disclosure preview

☐ Gather all required closing documents

☐ Prepare deed and transfer documents

☐ Verify homeowner's insurance coverage

☐ Prepare post-closing document checklist

🎲 Days 22-30: Final Preparations & Closing

Pre-Closing Tasks

- ☐ Schedule final walkthrough
- ☐ Confirm closing date and time with all parties
- ☐ Prepare closing statements
- ☐ Verify utility transfer arrangements
- ☐ Confirm moving arrangements
- ☐ Prepare closing day agenda

Final Walkthrough

- ☐ Accompany buyer for final walkthrough
- ☐ Verify property condition matches contract
- ☐ Check that all repairs are completed
- ☐ Test all systems and appliances
- ☐ Document any issues discovered

Closing Day

- ☐ Arrive early to review closing documents
- ☐ Verify all parties have required identification

☐ Review closing disclosure with clients

☐ Ensure all documents are properly executed

☐ Verify funding and recording

☐ Distribute keys and garage door openers

Post-Closing Tasks

Immediate Post-Closing (Days 1-3)

☐ Confirm deed recording

☐ Distribute closing documents to all parties

☐ Process commission payments

☐ Update transaction management system

☐ Send closing confirmation to all parties

Follow-Up Tasks (Days 4-14)

☐ Verify title policy delivery

☐ Confirm utility transfers completed

☐ Send satisfaction survey to clients

☐ Update client database

☐ Archive transaction documents

Transaction Information

Property Address:

Listing Agent:

Contract Date:

Buyer's Agent:

Closing Date:

Lender:

Additional Notes & Reminders

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