

# Real Estate Buyer Agent Checklist

## 1. Initial Client Consultation

Set appointment via phone, virtual, or in-person (date/time: \_\_\_\_\_)

Ask questions to learn about client and home preferences:

What is your budget range?

Have you gotten a pre-approval?

What are your must-haves, wants, and nice-to-haves in a new home?

Do you have any deal-breakers?

What is your ideal timeline for moving into a new home?

Are there specific neighborhoods or areas you're considering?

## 2. Financial Prequalification & Pre-approval

- Prequalification letter (Date: \_\_\_\_\_)
- Pre-approval letter (Date: \_\_\_\_\_)
- Amount approved for \$\_\_\_\_\_

## 3. Provide Market Education

- Review current trends and statistics:
  - Pricing
  - Inventory level
  - Current property selling/buying strategies
  - Interest rates
  - Competition in desired area
  - Days on market
  - Preferences in relation to desired area

## 4. Neighborhood Selection

- Preferences of neighborhood:
  - Neighborhood #1:

4. Neighborhood Selection (cont'd)

Neighborhood #2:

Neighborhood #3:

Preferences in a neighborhood:

Preference #1:

Preference #2:

Preference #3:

Preference #4:

Preference #5:

## 5. Perform Home Search

Search on listing sites

MLS

Zillow

Realtor.com

Professional network

Exclusive listings

Send listings to client

What do you like about this property, and why?

What do you dislike about this property, and why?

How do you feel about the layout and space of this home?

Can you see yourself living in this neighborhood?

Is there anything missing in this home that you were hoping to find?

### 5. Perform Home Search (cont'd)

- How does this home compare to others we've seen?

- What are your thoughts on the price of this home?

- Does this home's condition meet your expectations?

## 6. Property Viewings

- Organize property viewings and open houses
- Visit properties
- Take notes for clients and document client response to properties
- Print out listing sheets for each property
- Revisit properties (as needed)
- Debrief after viewings to decide next steps

## 7. Make an Offer

- Reach out to listing agent about properties buyers are interested in
- Craft offer and include:
  - Competitive price
  - Contingencies
  - Personalized letter
  - All necessary documents for financing
  - Down payment/earnest money
- Negotiate as needed

## 8. Coordinate Inspection

- Date/time of home inspection: \_\_\_\_\_
- Ask inspector questions (if applicable) [Critical Questions to Ask Home Inspectors](#)
- Receive and review inspection report

## 9. Negotiating Repairs for the Client

- Speak with buyers about needed repairs (who will fix, who will pay)
- Liaise between listing and buyers to finalize negotiations
- Get quotes for repairs, if applicable
- Complete repairs, if applicable

## 10. Schedule the Appraisal

- Appraisal date/time \_\_\_\_\_
- Review appraisal report
- Negotiate, if needed

## 11. Request a Title Search

- Involve a reputable title company
- Work with title company revolving issues, if applicable
- Consult with real estate attorney, if needed

## 12. Finalize Mortgage

- Liaise with mortgage lender to make finalize process, if needed
- Assist with any document gathering

## 13. Review Closing Document

- Review closing documents with clients

## 14. Perform Final Walk-through

- Schedule final walk-through (date/time: \_\_\_\_\_)
- Check items during walk-through:
  - Completion of agreed-upon repairs:** Confirm all repairs outlined in the contract are completed.
  - Operational systems:** Test HVAC, water heater, and plumbing to ensure they're working properly.
  - Electrical systems:** Check all light switches, outlets, and fixtures for functionality.
  - Windows and doors:** Ensure all windows and doors open, close, and lock smoothly.
  - Ceilings, walls, and floors:** Inspect for any new damage or issues.
  - Exterior inspection:** Examine the roof, siding, and gutters for condition and damage.
  - Pest and mold inspection:** Look for signs of new pest infestations or mold growth.
  - Included items:** Verify all items included in the sale are present and in good condition.
  - Cleanliness:** Check that the property is clean and free of the seller's belongings.
  - Security and safety:** Test smoke detectors and ensure all keys and codes are provided.
- Document any issues
- Negotiate, if needed

## 15. Coordinate Closing

- Schedule closing (date/time: \_\_\_\_\_)



## 16. Help With Utilities & Services Transfer

- Give clients a list of utilities/services to transfer:
  - Electricity:** Contact information for the local electricity provider. Suggest start date for service to ensure power is on upon move-in.
  - Gas:** Local gas company contact details. Recommended timeline for initiating service, especially important in colder climates to avoid heating disruptions.
  - Water and sewer:** Utility provider's contact details for water services. Instructions for establishing the account, including any necessary deposits or fees.
  - Trash and recycling:** Information on the local waste management company. Schedule for trash and recycling pickup, including any community-specific recycling programs.
  - Internet and cable:** A list of available service providers in the area. Tips for comparing packages and deals tailored to the client's needs.
  - Telephone:** Landline options, if required, including traditional telephone service providers and VoIP (voice-over-internet-protocol) alternatives.

## 17. Hand Over Keys to Client

- Capture moment for clients
- Give personalized closing gift

## 18. Provide Post-closing Support

- Check-in after closing
- Check for other challenges and questions, if applicable
  - Homeowner Association (HOA) rules
  - Unexpected repairs
  - Understanding home warranty coverage
  - Mail and package delivery

## 19. Send a Resource List of Providers

- Appliance repair      *Contact info:* \_\_\_\_\_
- Attorney                *Contact info:* \_\_\_\_\_
- Contractor              *Contact info:* \_\_\_\_\_
- Carpet cleaner         *Contact info:* \_\_\_\_\_
- Electrician              *Contact info:* \_\_\_\_\_
- Flooring                 *Contact info:* \_\_\_\_\_
- Handyperson          *Contact info:* \_\_\_\_\_
- HVAC                     *Contact info:* \_\_\_\_\_
- Home inspector        *Contact info:* \_\_\_\_\_
- Home warranty         *Contact info:* \_\_\_\_\_

19. Send a Resource List of Providers (cont'd)

- Landscaping      *Contact info:* \_\_\_\_\_
- Mortgage lender      *Contact info:* \_\_\_\_\_
- Moving/storage      *Contact info:* \_\_\_\_\_
- Painting      *Contact info:* \_\_\_\_\_
- Plumbing      *Contact info:* \_\_\_\_\_
- Roofing      *Contact info:* \_\_\_\_\_
- Staging      *Contact info:* \_\_\_\_\_

20. Perform Follow-up

- Send a personalized text or email
- Request referrals
- Initiate an email drip campaign
- Seasonal greetings
- Provide local market updates
- Organize client appreciation events