



# Real Estate Checklist and Email Templates

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## Transaction coordinator checklist

### Seller

- ☐ Complete comparative market analysis (CMA)
- ☐ Listing agreement between seller and agent or brokerage
- ☐ Create listing in **ListedKit**
- ☐ Add lockbox
- ☐ Seller property disclosure
- ☐ Send seller open house checklist
- ☐ Signed seller net sheet
- ☐ Copy of tax records
- ☐ Add listing to MLS
- ☐ HOA disclosure (if applicable)
- ☐ CDD (Community Development District) addendum
- ☐ Lead based paint disclosure - for homes built prior to 1978
- ☐ Short sale addendum
- ☐ Hire photographer
- ☐ Upload photos to MLS
- ☐ Install sign at home
- ☐ Schedule open house
- ☐ Order property profile from title company

- ☐ Purchase gift for client to celebrate their home sale

## Buyer

- ☐ Contract documents signed and uploaded to **ListedKit**
- ☐ Executed offer to purchase
- ☐ Proof of funds or pre-approval Earnest money
- ☐ Add inspector
- ☐ Add lender
- ☐ Order inspections
- ☐ Upload inspections to **ListedKit**
- ☐ Create inspection addendum
- ☐ Complete agent info sheet for title
- ☐ Schedule closing
- ☐ Seller disclosure
- ☐ Signed buyer net sheet
- ☐ HOA disclosure (if applicable)
- ☐ CDD (Community Development District) addendum
- ☐ Lead based paint disclosure - for homes built prior to 1978 Appraisal
- ☐ Short sale addendum
- ☐ Wire fraud prevention notice
- ☐ Ensure MLS marked pending
- ☐ Home warranty
- ☐ Final walkthrough (see Walkthrough Checklist)
- ☐ Complete close
- ☐ Upload to Housing and Urban Development (HUD)
- ☐ Purchase gift for client to celebrate their home purchase

## Walkthrough checklists

### Essential Walkthrough Checklist

- ☐ Bring the essentials
  - ☐ Final contract
  - ☐ Phone
  - ☐ Phone charger
  - ☐ Notepad (or notes app on phone)
  - ☐ Inspection summary

- ☐ Real estate agent
- ☐ Verify final repairs
- ☐ Check all items included in the sale (window blinds, appliances, etc.)
- ☐ Open windows and doors
- ☐ Inspect bathrooms (run facets, run showers/baths, flush toilets)
- ☐ Try heating and air conditioning
- ☐ Test electrical system (e.g., plug in your phone)
- ☐ Tour the property (thoroughly)
- ☐ Look for signs of pests (e.g., rats/mice, ants)

## Transaction coordinator email scripts

Welcome the client and introduce yourself

Subject Line: Thank you! We're excited to sell your house

Hi [CLIENT NAME],

My name is [YOUR NAME], and I am the Transaction Coordinator who will be working on your listing with [AGENT'S NAME].

My job is to ensure your closing runs smoothly.

Throughout this process, you will be receiving several emails from me with updates, reminders, and occasional questions. To ensure all of my emails go straight to your inbox please add my email "[YOUR EMAIL]" to your contact list.

[AGENT'S OFFICE] uses ListedKit to manage all transactions. You will receive an invite via email shortly. Please follow the instructions in the email to create your account.

Please reach out via phone at [YOUR PHONE NUMBER] or email with any questions. I'm always happy to help.

Best,  
[YOUR NAME]

Your listing is live

Subject Line: Your Home is Live on the Internet

HI [CLIENT NAME],

Congratulations, your home is officially listed! To view your listing, please click on this link [LINK TO LISTING].

To view your home on the MLS, please use this link: [LINK TO LISTING ON MLS].

Please reach out via phone at [YOUR PHONE NUMBER] or email with any questions. I'm always happy to help.

Best,  
[YOUR NAME]

Your home is under contract

Subject Line: Your Home is Under Contract!

HI [CLIENT NAME],

Congratulations! Your home is under contract. Here is a timeline of the important events leading to your closing.

- The Effective Start Date is [EFFECTIVE START DATE].
- The Escrow Deposit is due to [TITLE COMPANY] by [ESCROW DUE DATE].
- Home Inspection is due by [INSPECTION DUE DATE].
- Title Commitment is due by [TITLE] from the title company.
- Your Home's Appraisal is due [APPRAISAL DUE DATE].
- The Loan Approval is due from the buyer's lender by [LOAN APPROVAL DATE].
- **Anticipated closing date: [CLOSE DATE].**

### **Home Inspection**

You do not have to attend, but it is recommended that you do. A septic inspection, wind mitigation, and/or a wood-destroying organism (WDO) inspection may be necessary.

### **Title Commitment**

The title insurance company discloses to all parties involved in the real estate transaction any defects, liens, and obligations that affect the property.

### **Home Appraisal**

Your home appraisal is initiated by the lender to ensure the loan value is supported by an appraised value. You will be notified when this is scheduled.

**Loan Approval**

This signifies the buyer's mortgage is approved for closing.

**Final Walkthrough**

The final walkthrough will be scheduled before the buyer's closing. This usually occurs right before the buyer's signing. Don't forget to turn all utilities on for this walkthrough.

**Closing**

The above must be completed on time to ensure we close on time. You will be contacted soon by the closing agent at [TITLE CO NAME]. Please work with them on any information they might need to get you to the closing table on time.

A copy of your executed contract is available for you on ListedKit.com.

As always, give me a call at [YOUR PHONE NUMBER] or shoot me an email if you need anything or have any questions.

Best,  
[YOUR NAME]

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## Thank you letter after closing a sale

Selling agent - Home seller

Subject: Congratulations! Your home sold

Yay! It sold. Selling your home is always a little tough. It was your home. You built a lot of memories there.

You will build more memories in your new home. And I look forward to seeing you and your family grow.

[ListedKit.com](#)

As always, give me a call at [YOUR PHONE NUMBER] or shoot me an email if you need anything or have any questions.

Best,  
[YOUR NAME]

Buying agent - Home buyer

Subject: Congratulation on your new home

You can finally rest! Take your time and enjoy your new home.

Thank you for allowing me to help you find a home for your family!

I'd love to swing by in the next two to three weeks to drop off a gift. Just let me know when is a good time.

As always, give me a call at [YOUR PHONE NUMBER] or shoot me an email if you need anything or have any questions.

Best,  
[YOUR NAME]

## Buyer closing instructions

Preparing for closing

Subject: Closing is around the corner

Hi [CLIENT NAME],

You're almost in your new home. But before we close, please read through this email in preparation for your upcoming closing.

Your closing is expected to take place at [TITLE COMPANY] located at [TITLE COMPANY ADDRESS] on [DATE OF CLOSING]. You can reach them via phone at [TITLE COMPANY PHONE]. I've sent you a calendar invite to [CLIENT EMAIL] with all of the information as well.

In preparation for the closing, please schedule the utilities and services at your new

address to activate the day after closing.

- Electricity: [ELECTRIC COMPANY WEBSITE]
- Water: [WATER COMPANY WEBSITE]
- Trash/Recycling: [TRASH/RECYCLING WEBSITE]
- Internet/Cable/Phone: [INTERNET/CABLE WEBSITE]

Once you get your CD (Closing Disclosure) from your lender, you will need to wire your closing funds (if any) to the title company. This is the same place and same instructions that you used to send your escrow deposit.

You will need to bring the below to the closing:

- 2 forms of ID
- Driver's license or state ID
- Social security card, passport, insurance card, or voter registration card (credit cards are not acceptable)

The last item is setting up a final walk-through. This is done the day before closing so you can take one last look at the property before you purchase it. Can you send over a couple of dates and times to complete the walkthrough? I'll coordinate everything with the seller's agent.

Please call me at [YOUR PHONE NUMBER] or respond to this email with any questions.

You're almost there!  
[YOUR NAME]

## Referral ask

Subject: Settled in? Plus small ask

It's been a little over a month. I hope you're all settled in and enjoying [BEST FEATURE OF THE NEW HOME] in your new home.

I have one small ask from you.

If you enjoyed the work I did in helping you find your home, I'd appreciate any referrals from your friends and colleagues.

If there was something I could have done better, I'm all ears. Feel free to send it via email or submit it anonymously here.

As you know, I'm incredibly responsive on all of my messaging channels. Feel free to share all or any of the below with your friends and colleagues:

- Email: [AGENT EMAIL]
- Call/Text: [AGENT PHONE]
- Website: [AGENT WEBSITE]

Please let me know if there is anything I can do to help you in the future.

Best,  
[YOUR NAME]

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