

Real Estate Closing Checklist Template

General Information

- ☐ Confirm property address
- ☐ Verify buyer and seller contact details
- ☐ Confirm real estate agent and brokerage information
- ☐ Record closing date and time
- ☐ Verify escrow company and transaction reference details

Financial Details

- ☐ Verify final purchase price
- ☐ Confirm earnest money deposit details
- ☐ Confirm down payment amount
- ☐ Ensure loan approval and lender contact details are accurate
- ☐ Review breakdown of closing costs
- ☐ Prorate property taxes and HOA fees

Required Documents

- ☐ Ensure purchase agreement is signed
- ☐ Review title insurance policy
- ☐ Confirm home inspection report
- ☐ Appraisal report received
- ☐ Verify loan documents are ready
- ☐ Review seller disclosures
- ☐ Ensure proof of repairs is available
- ☐ Include home warranty information (if applicable)

Pre-Closing Tasks

- ☐ Schedule and complete the final walk through
- ☐ Ensure all contingencies, including financing and appraisal, are met
- ☐ Confirm all repairs or updates are completed
- ☐ Obtain homeowners insurance policy
- ☐ Arrange utility transfers (e.g., electricity, water, internet)
- ☐ Verify HOA documents and fees, if applicable

Title and Escrow Tasks

- ☐ Complete title search and clearance
- ☐ Review and confirm title insurance policy
- ☐ Verify escrow account details and funds
- ☐ Ensure all required documents are signed by all parties

Closing Day Checklist

- ☐ Bring driver's license or government issued photo ID
- ☐ Have certified funds or proof of wire transfer
- ☐ Review and sign the closing disclosure and all documents
- ☐ Complete and sign documents such as the deed and loan package
- ☐ Collect keys, garage openers, and any access items
- ☐ Confirm ownership transfer is documented

Post-Closing Tasks

- ☐ File all closing documents securely
- ☐ Update mailing address with USPS and service providers
- ☐ Set up new accounts for utilities or HOA
- ☐ Follow up with clients for feedback or testimonials
- ☐ Send a thank-you note or closing gift to clients

Additional Notes/Custom Tasks

- ☐ Add specific reminders or case-specific needs