CLIENT CLOSING COMPANION

From Contract to Closing

Your next steps, organized in one place

Use this checklist with your signed contract, escrow instructions, lender guidance, and Leslie's transaction updates. Fill in the dates below so the milestones that matter most are always within reach.

IMPORTANT Your signed contract and addenda control every deadline. Dates vary by transaction, so confirm each milestone with Leslie, escrow, and your lender.

01 YOUR TRANSACTION AT A GLANCE

PROPERTY ADDRESS ________________________	CLIENT NAME(S) ________________________
OFFER ACCEPTED / DAY ZERO ________________________	ESCROW COMPANY + CONTACT ________________________
INITIAL DEPOSIT DUE ________________________	INSPECTION CONTINGENCY DUE ________________________
LOAN CONTINGENCY DUE ________________________	APPRAISAL CONTINGENCY DUE / WAIVED ________________________
FINAL WALKTHROUGH ________________________	SIGNING DATE ________________________
CLOSING / RECORDING DATE ________________________	POSSESSION / KEY DATE ________________________

02 THE PATH AHEAD

1	2	3	4	5
ACCEPTED	INVESTIGATE	FINANCE	FINALIZE	CLOSE

Every step builds toward a confident close. Your role may change by phase; the next page identifies which items are for the buyer, seller, or both.

03 KEEP THE TRANSACTION MOVING

RESPOND PROMPTLY Quick replies keep decisions and deadlines on track.	**KEEP FUNDS TRACEABLE** Avoid unexplained deposits or transfers without lender guidance.
PROTECT YOUR CREDIT Before closing, avoid new credit, large purchases, or job changes.	**VERIFY WIRE INSTRUCTIONS** Call a trusted number before sending funds; never rely on an emailed change.

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FROM CONTRACT TO CLOSING

The Closing Checklist

Check each item as it is completed. Leslie will help you adapt this list to the terms of your transaction.

01 DAY ZERO & ESCROW OPEN

☐	**BOTH**	Save the fully signed contract and all addenda.
☐	**BOTH**	Confirm escrow contact information and review wire-fraud safety procedures.
☐	**BUYER**	Send the initial deposit by the contract deadline and retain proof.
☐	**SELLER**	Provide requested disclosures and transaction documents promptly.

02 INVESTIGATION & DISCLOSURES

☐	**BUYER**	Review disclosures, reports, title items, and HOA documents, if applicable.
☐	**BUYER**	Schedule inspections appropriate for the property and your concerns.
☐	**BOTH**	Track contingency dates and discuss findings, requests, or strategy with Leslie.
☐	**SELLER**	Document completion of any agreed repairs or credits.

03 FINANCING & APPRAISAL

☐	**BUYER**	Provide lender documents quickly and keep employment, assets, and credit stable.
☐	**BUYER**	Confirm appraisal status, loan approval, insurance, and closing funds.
☐	**SELLER**	Maintain property access for the appraisal and approved appointments.

04 FINAL PREPARATIONS

☐	**BOTH**	Review the preliminary settlement or closing statement for accuracy.
☐	**BUYER**	Bind homeowner's insurance and arrange utilities for possession.
☐	**SELLER**	Complete agreed work, gather receipts, and plan utilities and move-out.
☐	**BOTH**	Schedule the final walkthrough and confirm safe signing/wire instructions.

05 SIGNING, CLOSING & KEYS

☐	**BOTH**	Sign final documents and bring approved identification.
☐	**BUYER**	Deliver remaining funds only after independently verifying instructions.
☐	**SELLER**	Confirm proceeds instructions and the agreed condition of the property.
☐	**BOTH**	Wait for county recording confirmation before exchanging keys or possession.
☐	**BOTH**	Save closing statements, disclosures, warranties, and tax records.

NOTES

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A NOTE ABOUT THIS GUIDE This checklist is for general educational use. It does not replace your contract or advice from escrow, your lender, an attorney, or a tax professional. Transaction duties and timing are specific to your signed documents.

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