

CONTRACTING CHECKLIST

Buyer/Co-Buyer Info

- First, middle, and last name for buyer and co-buyer
- Street name, city, state, zip
- Phone, email, date of birth
- Marital status
- Who is taking the property (myself as individual, myself as co-buyer, entity, trust, retirement plan)

Entity Info

- Entity name, type, and state
- If LLC: Filed/stamped Articles of Organization, Operating Agreement, Resolutions Authorizing Signatory (if applicable), Certificate of Good Standing
- If Trust: Certificate of Trust, Declaration of Trust, and Amendments to Declaration of Trust (each signed and notarized); Real Estate Signing Resolution, Multiple Name Verification, and Entity Documents for all member entities
- If 401k: Adoption Agreement, Plan Summary, and Real Estate Signing Resolution (an Auction.com form)

Agent (if applicable)

- Agent's name, email, phone number, and agent license number
- Agent's firm name and full address

Funding

- Funding type (Cash, Hard Money Loan, Line of Credit, Conventional Loan or Other)
- Financing details (if applicable): lender name plus financing agent name, phone number, and email

Purchase Details

- Vesting type
- Whether you will be purchasing title insurance
- Whether you'll use the seller's escrow company or your own

Escrow Company Info (If applicable)

- Company name plus full address
- Escrow contact's name, email, and phone number

Additional questions

- Are you purchasing this as an investment, primary residence, or second home?
- Are you a first time home buyer?
- (If property is unoccupied) have you viewed the inside of the property?
- Are you a licensed real estate agent?
- Is your preferred communication method email, phone or other?
- When is the best time to call you: morning, afternoon, evening, or anytime?