

WASHINGTON · TRANSACTION RECORDS

Transaction file completion checklist

25 checks before completing the brokerage file.

01 Agreement package

- ☐ Final purchase and sale agreement.
- ☐ Every addendum incorporated into the agreement.
- ☐ Legal-description exhibit when required.
- ☐ Every later amendment, extension and written modification.
- ☐ Offers, counteroffers and other agreement records required by the brokerage.

02 Signatures and delivery

- ☐ Required signatures, initials and dates are present on the final documents.
- ☐ Evidence of delivery or receipt is retained when material to the agreement.
- ☐ Required agency and compensation disclosures are in the file.
- ☐ Seller disclosure and related receipt or waiver records are present when applicable.
- ☐ Contractual notices and responses are retained with their delivery records.

03 Money and closing records

- ☐ Earnest-money receipt or other required delivery confirmation.
- ☐ Required records for any transaction funds handled by the brokerage.
- ☐ Final closing or settlement statement supplied to the brokerage.
- ☐ Commission, referral and compensation records required by the brokerage.
- ☐ Confirmation of closing or the final outcome of a transaction that did not close.

04

Correspondence and supporting records

- ☐ Material correspondence affecting terms, performance, notices or the transaction outcome.
- ☐ Inspection-related agreements and records required by the brokerage.
- ☐ Title-related notices, objections and responses retained when applicable.
- ☐ Transaction receipts and other supporting documents required by the brokerage.
- ☐ Referral agreements and related records when applicable.

05

Brokerage completion

- ☐ Files are legible, consistently named and attached to the correct transaction.
- ☐ Drafts and duplicates are handled according to brokerage policy without removing required history.
- ☐ The complete file is submitted to the designated broker or delegated reviewer.
- ☐ Requested corrections or missing documents are resolved and documented.
- ☐ The completed record is retained in the brokerage-approved system for the required period.

The signed agreement, written modifications and your brokerage's instructions control. DateHog does not provide legal advice.