

CALIFORNIA · RESIDENTIAL TRANSACTION

California contract-to-closing checklist

Use these 35 steps to organize a California residential transaction from acceptance through recordation and file completion.

01 Verify the accepted agreement

- ☐ Save the final accepted purchase agreement and every incorporated addendum and counteroffer.
- ☐ Confirm the acceptance date and delivery that formed the agreement.
CHECK THE SIGNED AGREEMENT
- ☐ Verify the parties, property, purchase price and financing terms.
- ☐ Record the close-of-escrow date, possession terms and any occupancy agreement.
CHECK THE SIGNED AGREEMENT
- ☐ Confirm delivery and acknowledgement of the applicable agency relationship disclosures.
- ☐ Submit the executed transaction documents through the brokerage's required process.

02 Open escrow and deliver the deposit

- ☐ Confirm escrow is open and has the complete accepted agreement.
- ☐ Record the initial deposit amount and delivery deadline in the agreement.
CHECK THE SIGNED AGREEMENT
- ☐ Obtain and retain escrow's confirmation that the deposit was received.
- ☐ Track review and signing of escrow instructions and opening documents.
- ☐ Create a contact sheet for the agents, coordinator, lender, escrow, title and other named parties.
- ☐ Give the client a plain-language timeline based on the signed agreement.

03

Track disclosures and investigations

- ☐ Track delivery and review of the Transfer Disclosure Statement when applicable.
- ☐ Confirm the required agent visual inspection and related disclosure are completed when applicable.
- ☐ Track natural-hazard and other location- or property-specific disclosures used in the transaction.
- ☐ Confirm the federal lead-based-paint disclosure for applicable pre-1978 housing.
- ☐ For common-interest property, track association documents, budgets, minutes and review rights.

CHECK THE SIGNED AGREEMENT

- ☐ Schedule buyer investigations and track the contractual investigation period.

CHECK THE SIGNED AGREEMENT

- ☐ Document repair requests, credits or other negotiated changes in writing.
- ☐ Track the preliminary title report, exception documents and resolution of title questions.

04

Manage contingencies and closing

- ☐ Calendar each investigation, disclosure, loan, appraisal, sale-of-property and other contingency.
- ☐ Track lender requirements, loan progress and any financing contingency.
- ☐ Coordinate appraisal access and track the appraisal contingency when included.
- ☐ Prompt the buyer to confirm property insurance availability and cost early.
- ☐ Track written contingency removals only as authorized by the client and required by the agreement.

CHECK THE SIGNED AGREEMENT

- ☐ Confirm the buyer receives and reviews lender closing disclosures and cash-to-close information.
- ☐ Tell the client to verify wiring instructions directly with escrow through a trusted contact method.
- ☐ Arrange the final verification of property condition and review agreed repairs.

05

Confirm recordation and complete the file

- ☐ Confirm signing arrangements and escrow's remaining requirements.
- ☐ Track lender funding and buyer funds without treating signing as closing.
- ☐ Obtain confirmation that the deed recorded and escrow closed before releasing possession.
- ☐ Release keys and possession according to the written agreement.
- ☐ Save the final closing statement, signed changes, disclosures and material correspondence.
- ☐ Complete the brokerage's final file review and correct any missing items.
- ☐ Send the client a closing confirmation and practical property handoff information.

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