

TEXAS · RESIDENTIAL TRANSACTION

Texas contract-to-closing checklist

Use these 32 steps to organize a Texas residential transaction from the effective date through funding and file completion.

01 Verify the contract

- ☐ Save the final executed contract and every referenced addendum.
- ☐ Confirm the effective date shown by the parties or brokers and use it to calculate contract periods.
CHECK THE SIGNED AGREEMENT
- ☐ Verify the parties, property description, sales price and included or excluded property.
- ☐ Record the closing date, possession terms and any temporary lease.
CHECK THE SIGNED AGREEMENT
- ☐ Confirm the contract's notices information is complete for the parties and brokers.
- ☐ Submit the executed documents through the brokerage's required compliance process.

02 Handle earnest money and the option

- ☐ Confirm the named escrow agent and verified delivery instructions.
- ☐ Record the earnest-money amount and delivery deadline in the signed contract.
CHECK THE SIGNED AGREEMENT
- ☐ Record the option fee and its delivery deadline, when an option is included.
CHECK THE SIGNED AGREEMENT
- ☐ Obtain and retain confirmation that the escrow agent received the required funds.
- ☐ Calendar the exact end of the option period, including the contractual cutoff time.
CHECK THE SIGNED AGREEMENT
- ☐ Track additional earnest money if the contract requires it.
CHECK THE SIGNED AGREEMENT

03

Track due diligence and disclosures

- ☐ Confirm delivery and review of the seller's disclosure notice when required.
- ☐ Check the contract for any groundwater or surface-water disclosure requirement.
- ☐ Confirm the federal lead-based-paint disclosure for applicable pre-1978 housing.
- ☐ Schedule inspections, provide access and track decisions during the option period.

CHECK THE SIGNED AGREEMENT

- ☐ Document any agreed repairs, treatments, credits or other changes in a signed amendment.
- ☐ Track subdivision or property-owners-association documents and any review right when applicable.

CHECK THE SIGNED AGREEMENT

- ☐ Track the existing or new survey, affidavit and any contract deadline for delivery.

CHECK THE SIGNED AGREEMENT

- ☐ Track the title commitment, exception documents and objection or cure periods.

CHECK THE SIGNED AGREEMENT

04

Coordinate financing and closing

- ☐ Send the contract to the lender when authorized and confirm the loan file is active.
 - ☐ Calendar every approval, notice and termination date in the financing addendum.
- CHECK THE SIGNED AGREEMENT**
- ☐ Track appraisal access and any appraisal addendum or lender-required repair.
 - ☐ Prompt the buyer to confirm insurability and coverage early in the option period.
 - ☐ Confirm the client receives settlement figures and verified funding instructions from the proper party.
 - ☐ Arrange the buyer's final walkthrough and confirm agreed repairs can be reviewed.
 - ☐ Confirm signing, funding and closing-agent requirements with the client.

05

Confirm closing and complete the file

- ☐ Obtain confirmation that the transaction has funded and closed before releasing keys or announcing completion.
- ☐ Release possession and access devices only as authorized by the written agreement.
- ☐ Save the final settlement statement, amendments, receipts and material correspondence.
- ☐ Complete the brokerage's final file review and resolve requested corrections.
- ☐ Send the client a closing confirmation and practical handoff information.

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