

Date: \_\_\_\_\_ Owner: \_\_\_\_\_

Address: \_\_\_\_\_

Prepared By: \_\_\_\_\_

- Make Certain Contract Is Fully Executed and Accurate
- Fill In Executed Date \_\_\_\_\_
- Short Sale Disclosure Signed By All Parties (Form Q)
- Send Client A Fully Executed Copy And Recorded Method

Make certain package is complete for Lender, include everything requested and possibly:

- Package Cover Letter (Form Q)
- Preliminary Closing Statement
- Listing Agreement
- MLS Print Out
- History Executed
- Contract
- Buyer Approval Letter
- Authorization To Release Information (Form A)
- Homeowner Financial Worksheet (Form F)
- Hardship Letter (Form N)
- Bank Statements (2 months, all accounts)
- Pay Stubs (2 months)
- Tax Returns (2 years)
- Property Photos (show true property condition)
- Market Data
- MLS Print Out

- Fax Complete Packet To Lender
- Mail Complete Packet To Lender
- Email / Fax / Send "What To Expect" Letter
- 72 Hours After Submission, Confirm Receipt Of Package
- Ask How Long Process Is Taking And Update All Parties
- Record BPO/Appraisal Completion Date \_\_\_\_\_
- BPO Appraiser Contact Information \_\_\_\_\_

Follow up with Lender 1 time per week until approval or counter received and log calls / result in File Management System.

**Document Everything!**

- Call            1            Date: \_\_\_\_\_
- Call            2            Date: \_\_\_\_\_
- Call            3            Date: \_\_\_\_\_
- Call            4            Date: \_\_\_\_\_
- Call            5            Date: \_\_\_\_\_
- Call            6            Date: \_\_\_\_\_
- Call            7            Date: \_\_\_\_\_
- Call            8            Date: \_\_\_\_\_
- Call            9            Date: \_\_\_\_\_

- Once Approval Is Received, Notify All Parties Of Required Closing Date
- Get Approval Signed By Seller If Required By Lender
- Proceed With Standard Closing Procedure