Accepted offer to closing checklist

For Ontario agents. Use it on every file so nothing slips between acceptance and closing.

John
Remote transaction coordinator

1 Right after acceptance

- [ ] Every signature and initial is in, on every page
- [ ] All schedules are attached and named in the agreement
- [ ] Date and time of acceptance recorded from the signed agreement itself
- [ ] Signed copies sent to the right people, through the channel your brokerage approves
- [ ] Deposit amount, holder, due date and method noted
- [ ] Deposit followed up until your office confirms the receipt (not a promise or a screenshot)
- [ ] File opened and named the same way every time, e.g. "Offer Documents - Property Address"

2 Conditions

- [ ] Each condition copied word for word from the signed agreement
- [ ] Each condition turned into one calendar date and time (check how "business days" are defined)
- [ ] Who needs to act, and what proof is needed, noted for each condition
- [ ] Reminders set a couple of days before and the day before each deadline
- [ ] Waiver or notice of fulfillment drafted only when the agent instructs
- [ ] Signed by the right party and delivered before the deadline, as the agreement allows
- [ ] Any changed terms handled with an amendment, with versions kept in order

3 Going firm

- [ ] Every condition dealt with, and confirmed in writing
- [ ] Status changed only when the paperwork is complete and the office confirms it
- [ ] Separate "you're firm" emails for buyer and seller clients, approved by the agent

4 Firm to closing

- [ ] Lawyer details verified before anything is sent
- [ ] Lawyer package sent: signed agreement, amendments, waivers or notices, deposit receipt
- [ ] What was sent and what is still outstanding written down
- [ ] Client reminders planned, for example about four weeks and two weeks before closing
- [ ] Closing file complete: final documents, condition proof, deposit receipt and closing notes

Administrative checklist only, not legal advice. Your brokerage's process and your Broker of Record come first.

Want this handled for you?
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