

Real Estate Purchase To Do List

Before Closing

1	Receipts of Contract	
2	Receipt of Mortgage Instruction	
3	To Confirm with clients / realtors about our representation & client contact information	
4	If necessary, send out retainer letter	
5	Open File	
6	To Put Closing Date on the Outlook Calendar, highlight with proper colour	
7	Review Contract	
8	If there are issues or special items such as repair issues, holdback, etc. To set up remainder in Outlook and mark on file	
9	Title Search – to discuss with Kathy regarding any concerns	
10	Tax Search	
11	Contact other side to obtain RPR; If there is – to give Kathy to Review ASAP	
12	HOA	
13	Condo Fee	
14	Drafting mortgage and calculating cash shortfall	
15	Arrange Signing and instruct client to purchase fire insurance	
16	After Signing and before closing date, confirm request for funds sent and bank received	
17	Receipt of Trust Package – Review NON-PERMIT ITEMS – Discuss it with Kathy	
18	Video Signing or Remote Signing – check LTO website	
19	NEW CONDO CLOSING – Speed Form sign by Kathy	

On Closing Date

1	Conduct Protocol and Pending Registration Searches	
2	Prepare Cash to Close Letter, Cheque	
3	Double Check Fire Insurance in place	
4	Double Check Outstanding issues in the contract	
5	No Holdback Requirement	
6	Release Funds	

After closing

1	DRR	
2	Account	
3	Note On File (Re: Outstanding Issues)	
4	Hold Back, RPR, Estoppel, Insurance, Tax Arrears, etc.	
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Other Items

1	Fire Insurance	
2	Estoppel Certificate	
3	Condo Insurance Certificate	
4	Real Property Report	
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