



Offer Submission Checklist

Offer Preparation & Review

Tasks related to drafting and reviewing the offer document itself.

Offered Purchase Price

Earnest Money Deposit Amount

Financing Type (if applicable)

- ☐ Cash
- ☐ Conventional
- ☐ FHA
- ☐ VA
- ☐ Other

Proposed Closing Date

Special Conditions/Requests

Write something...

Preferred Method of Communication

- ☐ Email
- ☐ Phone
- ☐ Text

Buyer's Full Name

Write something...

Buyer's Address

Write something...

Financial Documentation

Gathering and preparing all necessary financial documents to support the offer.

Earnest Money Deposit Amount

Enter a number...

Proof of Funds (Bank Statement)

 Upload File

Down Payment Amount

Enter a number...

Loan Type (if applicable)

☐ Conventional

☐ FHA

☐ VA


☐ USDA

☐ Cash

Loan Pre-Approval Amount

Enter a number...

Pre-Approval Letter

 Upload File

Property Information & Disclosures

Ensuring complete and accurate property details and required disclosures are included.

Property Address

Write something...

Parcel Number (APN)

Write something...

Lot Size (Square Feet)

Enter a number...

Property Survey (if available)

 Upload File

Known Property Defects (Check all that apply)

- ☐ None
- ☐ Roof Issues
- ☐ Foundation Issues
- ☐ Plumbing Issues
- ☐ Electrical Issues
- ☐ HVAC Issues
- ☐ Pest Infestation
- ☐ Other (Specify in Long Text)

Additional Property Disclosures (if 'Other' is selected above, provide details)

Write something...

Date of Last Property Tax Assessment

Enter date...

Contingencies & Addenda

Carefully crafting and including appropriate contingencies and addenda.

Financing Contingency?

☐ Yes

☐ No

Loan Approval Deadline (Days)

Enter a number...

Inspection Deadline

Enter date...

Inspection Details/Scope

Write something...

Sale of Buyer's Property Contingency?

☐ Yes

☐ No

Sale of Buyer's Property Deadline

Enter date...

Addenda to Include (Select all that apply)

- ☐ Lead-Based Paint Disclosure
- ☐ Seller Property Disclosure
- ☐ HOA Documents
- ☐ As-Is Addendum

Special Addenda Instructions (if any)

Write something...

Legal Review & Compliance

Ensuring the offer complies with all applicable laws and regulations, and potentially obtaining legal review.

Attorney Review Required?

- ☐ Yes
- ☐ No

Summary of Attorney Review Notes (if applicable)

Write something...

Compliance with Fair Housing Act?

- ☐ Verified
- ☐ Not Applicable

Date of Legal Review Completion

Enter date...

Copy of Legal Review Documentation (if applicable)

 Upload File

Description of any required disclosures based on local regulations

Write something...

Final Submission & Delivery

Preparing the offer for submission and ensuring proper delivery to the seller's agent/owner.

Seller's Agent Name

Write something...

Seller's Agent Phone Number

Write something...

Seller's Agent Email Address

Write something...

Delivery Method

- ☐ Email
- ☐ In Person
- ☐ Courier

Offer Document (PDF)

 Upload File

Date of Submission

Enter date...

Time of Submission

Confirmation Tracking Number (if applicable)

Write something...

Buyer's Signature - Confirmation of Submission