



# Real Estate Case Management Checklist Template

## Initial Assessment & Intake

Gathering initial information and defining the scope of the case.

### Client Name

Write something...

### Case Number (if assigned)

Enter a number...

### Date of Initial Contact

Enter date...

### Type of Real Estate Transaction

- ☐ Purchase
- ☐ Sale
- ☐ Lease
- ☐ Other


### Brief Description of Client's Needs/Concerns

Write something...

### Potential Issues Identified

- ☐ Title Issues
- ☐ Contract Disputes
- ☐ Zoning Concerns
- ☐ Environmental Risks
- ☐ Financial Constraints
- ☐ None Identified

### Relevant Documents (if available)

 Upload File

## Due Diligence & Title Review

Verifying property details, liens, and encumbrances.

### Title Search Order Date

Enter date...

### Summary of Title Search Results

Write something...

### Title Company Used

- ☐ Company A
- ☐ Company B
- ☐ Company C
- ☐ Other

### Copy of Preliminary Title Report

 Upload File

### Number of Recorded Liens

Enter a number...

### Description of Encumbrances (Easements, Restrictions)

Write something...

### Title Insurance Policy Status

- ☐ Ordered
- ☐ Issued
- ☐ Pending

## Contract Negotiation & Execution

Managing the drafting, review, and finalization of agreements.

### Offer Expiration Date

Enter date...

### Contingency Clauses?

- ☐ None
- ☐ Financing
- ☐ Inspection
- ☐ Sale of Property
- ☐ Other

### Negotiation Notes & Summary

Write something...

### Purchase Price Adjustment (if applicable)

Enter a number...

### Buyer Signature (Initial)

### Earnest Money Deposit Details?

- ☐ Confirm Amount
- ☐ Confirm Account
- ☐ Confirm Hold Period

## Uploaded Counteroffer Documents

 Upload File

# Financing & Escrow

Tracking loan applications, appraisals, and escrow processes.

## Loan Amount

Enter a number...

## Loan Type

- ☐ Conventional
- ☐ FHA
- ☐ VA
- ☐ USDA

## Loan Application Date

Enter date...

## Interest Rate

Enter a number...

## Appraisal Date

Enter date...

### Escrow Company

- ☐ Company A
- ☐ Company B
- ☐ Company C

### Escrow Fees

Enter a number...

### Funding Date

Enter date...

## Property Inspections & Reports

Coordinating and reviewing inspection results (e.g., home, environmental).

### Inspection Scheduling Date

Enter date...

### Inspection Type

- ☐ Home Inspection
- ☐ Pest Inspection
- ☐ Environmental Inspection
- ☐ Roof Inspection
- ☐ Property Survey

### Inspector's Summary/Notes

Write something...

### Inspection Report (PDF/Image)

 Upload File

### Inspection Cost

Enter a number...

### Inspection Result

- ☐ Satisfactory
- ☐ Needs Repair
- ☐ Major Issues Found

## Legal & Regulatory Compliance

Ensuring adherence to relevant laws and regulations (e.g., zoning, fair housing).

### Zoning Compliance Status

- ☐ Compliant
- ☐ Non-Compliant
- ☐ Pending Review

### Fair Housing Act Compliance

- ☐ Compliant
- ☐ Potential Issues
- ☐ Requires Review

### Environmental Assessment Completion Date

Enter date...

### Notes on Potential Regulatory Issues

Write something...

### Disclosure Status

- ☐ Disclosure Completed
- ☐ Disclosure Pending
- ☐ Disclosure Not Required

### Supporting Documents (e.g., Permits, Certificates)

 Upload File

## Closing & Transfer of Ownership

Managing the final steps of the transaction, including document signing and recording.



### Scheduled Closing Date

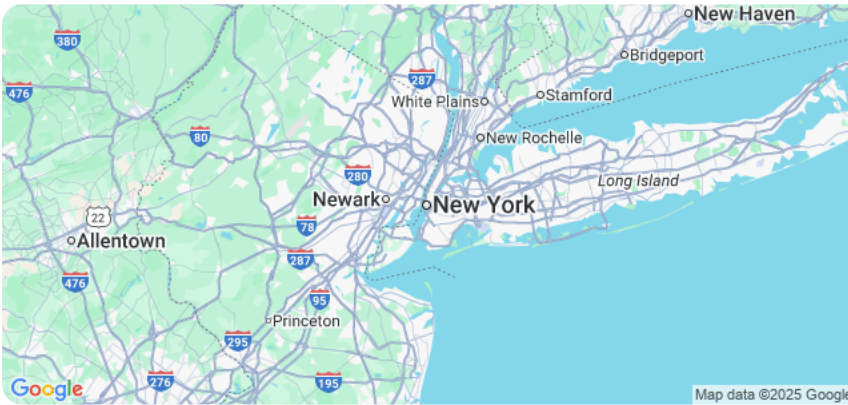
Enter date...

### Scheduled Closing Time

Enter time...

### Closing Location

 [Set My Current Location](#)



### Buyer Signature Capture

### Seller Signature Capture

### Final Deed Upload

 [Upload File](#)

### Total Closing Costs

Enter a number...

### Funding Status

- ☐ Funded
- ☐ Pending Funding
- ☐ Issue with Funding

## Post-Closing Activities

Handling any follow-up items or adjustments after the closing.

### Final Payment Received Date

Enter date...

### Adjustments/Refunds Issued (if any)

Enter a number...

### Summary of Post-Closing Issues (if any)

Write something...

### Title Company Satisfaction

- ☐ Very Satisfied
- ☐ Satisfied
- ☐ Neutral
- ☐ Dissatisfied
- ☐ Very Dissatisfied

### Supporting Documents (e.g., final accounting)

 Upload File

### Time spent on post-closing tasks

Enter time...

## Document Management & Archiving

Organizing and securely storing all case-related documents.

### Document Scan Date

Enter date...

### Document Category

- ☐ Contract
- ☐ Title Report
- ☐ Inspection Report
- ☐ Correspondence
- ☐ Financial Documents

### Document Description/Notes

Write something...

### Scanned Document File

 Upload File

### Document Status

- ☐ Initial
- ☐ Reviewed
- ☐ Final
- ☐ Archived

### Page Count

Enter a number...

## Communication & Stakeholder Management

Maintaining clear and consistent communication with all parties involved.

### Communication Method Preferred

- ☐ Email
- ☐ Phone
- ☐ In-Person
- ☐ Portal Message

### Last Communication Date

Enter date...

### Communication Summary

Write something...

### Stakeholders Involved

- ☐ Client
- ☐ Real Estate Agent
- ☐ Legal Counsel
- ☐ Mortgage Broker
- ☐ Title Company

### Contact Person Name

Write something...

### Number of Communications

Enter a number...

### Acknowledgement of Communication (Optional)