

SAMPLE LISTING FILE CHECKLIST

NEW LISTING FILE:

- Listing Agreement or MLS Compliance Certificate (signed by the seller)
- Any Addendums if Needed (price reduction, extension)
- Lead Disclosure (signed and initialed by seller and listing agent)
- Residential Property Disclosure (Single Family – 4 Family) (signed by seller)
- Concrete / Foundation Disclosure (for Sellers)
- Prospective Parties Form
- Fair Housing (for Sellers) (suggest sending electronically for your records)
- Copy of MLS Listing
- Copy of Tax Record (town or MLS)

If Needed:

- Coming Soon/Delayed Listing Form
- Audio/Video Surveillance Disclosure
- Inclusion/Exclusion Rider
- As-Is Rider
- Seller Authorization to sign for an LLC or estate

LISTING SALES CONTRACT FILE:

- Executed Contract
- Copy of EMD
- Brokerage Invoice
- Lead Disclosure (signed and initialed by all parties and agents)
- Residential Property Disclosure (Single Family – 4 Family) (signed by all parties)
- Concrete / Foundation Disclosure (for Sellers)
- Any Addendums if Needed (credit, extension, etc.)

If Needed:

- Condo RIDER (if condo)
- 2-4 Family Addendum
- Inclusion/Exclusion Addendum
- Interpreter Acknowledgment



SAMPLE BUYER FILE CHECKLIST

NEW BUYER FILE:

- Buyer Representation Agreement (signed by all parties)
- Lead Brochure
- Concrete / Foundation Disclosure (for Buyers)
- Prospective Parties Form
- Fair Housing (for Buyers) (suggest sending electronically for your records)

BUYER SALES CONTRACT FILE:

- Executed Contract
- Copy of EMD
- Brokerage Invoice
- Lead Disclosure (signed and initialed by all parties and agents)
- Residential Property Disclosure (Single Family – 4 Family) (signed by all parties)
- Copy of MLS Listing
- Copy of Tax Record (town or MLS)

If Needed:

- 2-4 Family Addendum
- Inclusion/Exclusion Addendum
- Interpreter Acknowledgment
- Condo Rider (if condo)
- Receipt of Condo Documents
- Waiver of Property Inspection
- Any Addendums if Needed (credit, extension, etc.)
- Dual Agency Consent
- Professional Service Fee Agreement (Broker to Broker or Seller to Pay)
- LLC Paperwork if Buyer is Buying/Transferring to an LLC
- Concrete / Foundation Disclosure



SAMPLE LEASE LISTING FILE CHECKLIST

NEW LISTING LEASE FILE:

- Listing Agreement
- Any Addendums if Needed (price reduction, extension)
- Lead Disclosure (signed and initialed by seller and listing agent)
- Concrete / Foundation Disclosure (for Sellers)
- Prospective Parties Form
- Fair Housing (for Sellers) (suggest sending electronically for your records)
- Copy of MLS Listing
- Copy of Tax Record (town or MLS)

If Needed:

- Coming Soon/Delayed Listing Form
- Audio/Video Surveillance Disclosure
- Inclusion/Exclusion Rider

NEW TENANT LEASE FILE:

- Standardized Rental Terms Summary Form
- Executed Lease
- Copy of Rental Deposit
- Copy of Application
- Lead Disclosure (signed and initialed by all parties and agents)
- Any Addendums if Needed (credit, extension, etc.)

If Needed:

- Receipt of monies received by brokerage
- Interpreter Acknowledgment



SAMPLE TENANT LEASE FILE CHECKLIST

NEW TENANT LEASE FILE:

- Tenant Representation Agreement (signed by all parties)
- Lead Brochure
- Prospective Parties Form
- Fair Housing (for Tenants) (suggest sending electronically for your records)

TENANT UNDER CONTRACT FILE:

- Standardized Rental Terms Summary Form
- Executed Lease
- Copy of Rental Deposit
- Copy of Application
- Lead Disclosure (signed and initialed by all parties and agents)
- Brokerage Invoice
- Copy of MLS Listing
- Any Addendums if Needed (credit, extension, etc.)

If Needed:

- Receipt of monies received by brokerage
- Interpreter Acknowledgment
- Dual Agency Consent
- Professional Service Fee Agreement (Broker to Broker or Landlord to Pay)

