

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)
- ☐ 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)

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)
- ☐ 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:

- ☐ 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)

TENANT UNDER CONTRACT FILE:

- ☐ 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)

