



ENTWISTLE
REAL ESTATE TEAM

kw
KELLERWILLIAMS.



RELOCATE WITH EASE BUYER CHECKLIST

READY TO BUY YOUR HOME?

Zach Entwistle

Dear Potential Home Buyer!

Hi and thank you for trusting me and my team to help guide you through buying your home.

We understand that many of our clients don't buy and sell real estate on a regular basis. We also know that you are probably pretty busy with jobs, hobbies, kids...life.

This is why we created this process checklist.

We wanted to give you a play-by-play understanding of what is going to happen as you move from thinking about buying a home all the way to getting keys to your new place.

WE'VE BROKEN DOWN THE PROCESS INTO MULTIPLE PHASES. AND IN EACH PHASE, YOU'LL FIND NOT ONLY A CHECKLIST OF THINGS WE NEED FOR YOU TO DO, AS WELL AS WHAT YOU CAN EXPECT FROM US.

We've also included phase specific FAQs that we hope will help answer some commonly asked questions.

I've also included a list of turbulence we may experience as we move through the transaction. Our hope is that if you and I do what we need to, when we need to, we will have the best chance of minimizing turbulence on our end.

And, keep in mind, turbulence is a regular part of any transaction. I've been selling real estate for over 15 years and haven't had 1 transaction without some bumps. I give you this list so you are aware of what we are working on (and preventing) from our standpoint.

If you have any questions anytime, feel free to reach out via phone, text, or email. We'd love to help get your questions answered and to give you your options.

Super grateful that you would let me be a part of your process!

On the journey,

Zach



BUYER PROCESS

Phase 1 – Getting Ready to Buy

Getting ready to buy your home can give you a mix of emotions! At this point in the process you may have a number of questions. Whether this is your first home or your 15th, it never hurts to review the process.

OUR TEAM'S TASKS

- Connect you with a lender if needed
- Go over your needs and wants
- Set up your home search
- Go over Disclosures
- Send Disclosures for electronic signatures, if applicable
- Set up group text for house showing
- Set up Group Marco Polo for video previews
- Talk to your lender to go over preapproval specifics
- Prep showings for 3 home preview
- Draft practice offer
- Go over how strong the market is to know what kind of offer you need to be competitive



YOUR NEXT TASKS

- If cash buyer, provide blacked out bank statements showing proof of available funds
- If mortgage, get preapproved & determine how much your closing costs and pre-pays will be
 - Have lender pull your credit report
 - Turn in all Bank statements, tax returns, pay stubs, etc requested by lender
 - Have your Down payment and closing costs liquid
- Send Zach contact information on who your mortgage lender is
- Send Zach your favorite homes you've seen online so far
- Sign Disclosures
- Download Marco Polo App
- 3 home preview
- Review practice offer and go over with Zach



Phase 2 – House Shopping

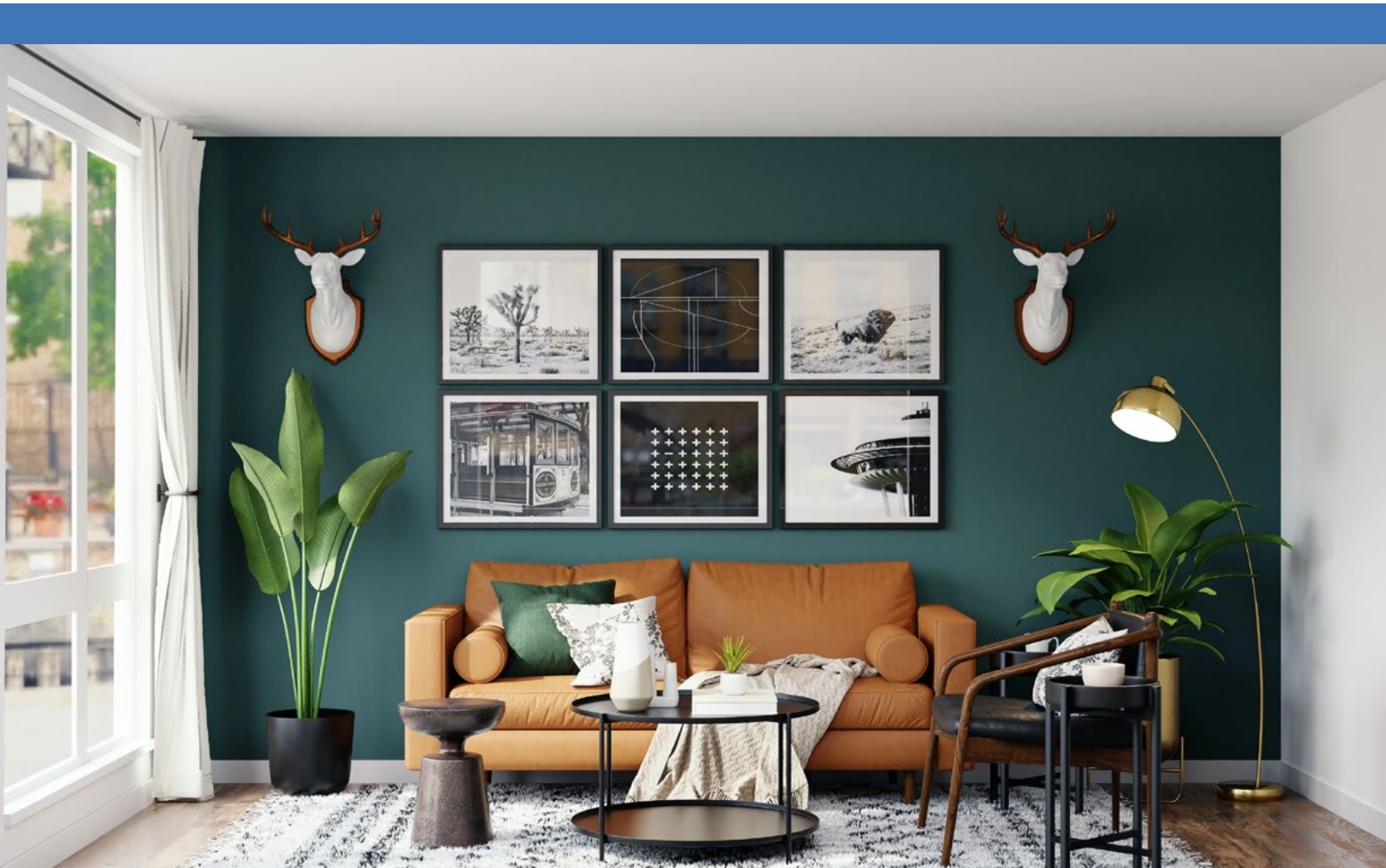
Our team will take you on a 3-home preview that will really help us narrow down your likes & dislikes. We want you to be as honest with your feedback as possible to help us find the perfect home for you and your family.

OUR TEAM'S TASKS

- We will be available to show you homes
- Continue to update your home search per your feedback

YOUR NEXT TASKS

- Look at the feed to see other homes you're interested in and let us know
- Have us preview it or go out and look at the home
- Making an offer if is 80% of what you are looking for



Phase 3 – Mutual Acceptance

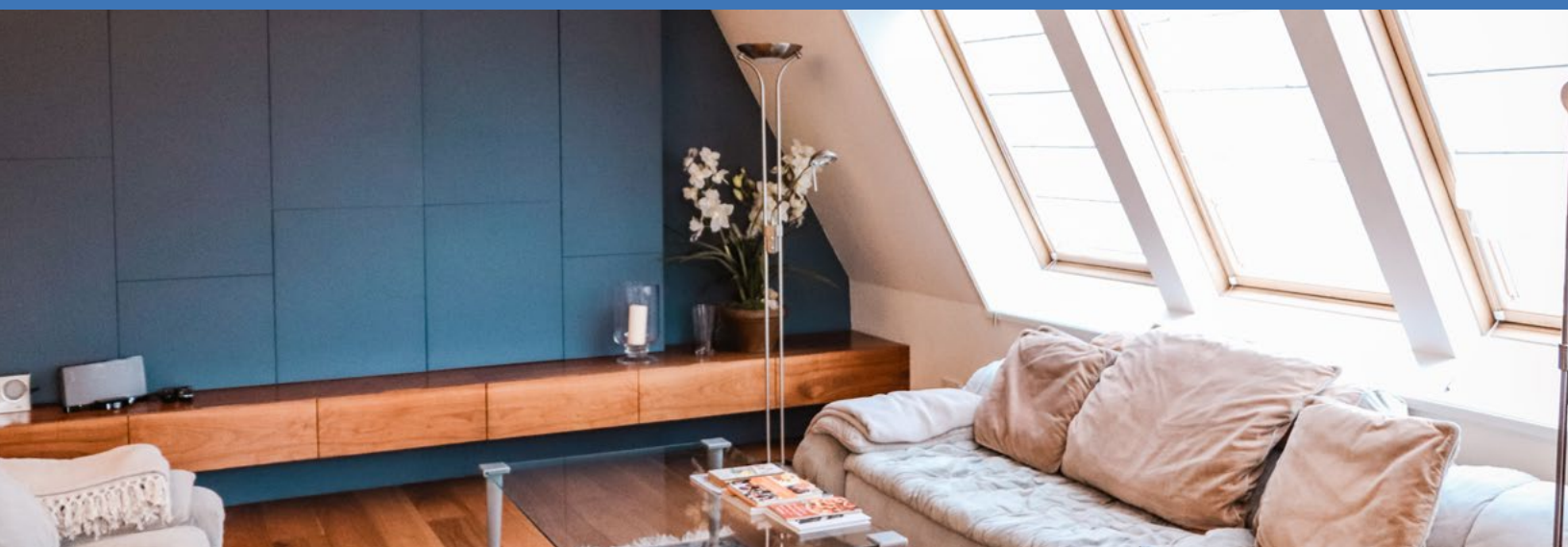
Congratulations on getting your offer accepted! It's okay to celebrate this. However, I'd recommend don't mentally move into the new home until you have the keys. That way, if something major comes up unexpectedly on the inspection, you won't be heart broken.

OUR TEAM'S TASKS

- Deliver the contract to escrow and your lender
- Order title for the home
- Schedule the inspection, including sewer scope
- Request HOA documents if applicable
- Negotiate Inspection

YOUR NEXT TASKS

- Deliver Earnest Money to Escrow within 2 days of mutual acceptance
- Contact your lender for any questions you have
- Provide your lender with any additional information they may need
- Contact your insurance company to tell them you are buying a house
- Contact your inspector or have Zach recommend one
- Attend the inspection if at all possible
- Review the seller disclosure statement
- Meet the neighbors and ask "What's the Best/worst thing about the neighborhood?"
- Review inspection report and decide what repairs you want to ask for





Phase 4 – Post inspection

We've reached a major milestone towards the successful closing of your new home!

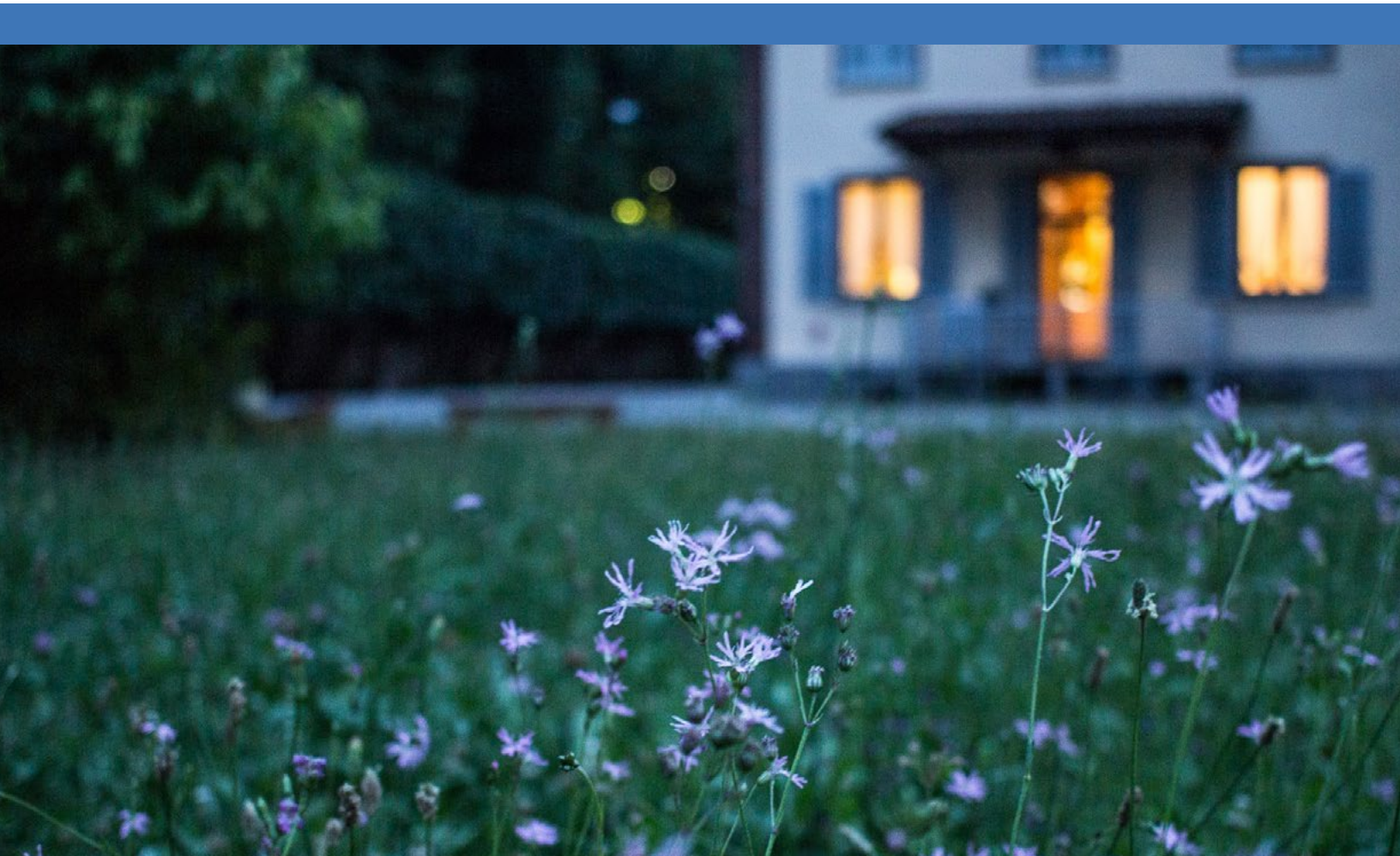
At this point, the nature of the process changes pretty substantially from being on the shoulders of the Realtor to the shoulders of the Lender. All of the milestones between here & closing are Lending or Escrow To-Do's. We shift in our role from being the main player to reporting and helping push the deal through to closing.

OUR TEAM'S TASKS

- Updating the lender & making sure the appraisal gets ordered
- Confirm lending has all needed documents & make sure they get approved from underwriting
- Work with Lending to make sure docs get sent to escrow in a timely matter
- Contact escrow to schedule your signing 5 days from closing

YOUR NEXT TASKS

- Confirm lending has all your updated documents like paystubs, etc.
- Start packing
- Contact your moving company, if applicable
- Contact your utility companies
 - Water: _____
 - Sewer: _____
 - Gas: _____
 - Electricity: _____
 - Garbage: _____
 - TV/Cable: _____
 - Internet: _____
- Escrow will contact you to schedule where and when the signing will be
- Do a final walk through of the home
- Either wire money for your down payment & closing costs or bring in a cashier's check at closing





Phase 5 – Signing/Closing/Move-in

An important thing to remember is, your signing day isn't always the same day as your closing day... which means you will generally get your keys on a different day. More than likely, your signing appointment will take place a day or 2 before the actual closing date.

OUR TEAM'S TASKS

- Be present at your signing either in person or via Zoom if at all possible
- Get you keys to your new home!
- Stay in touch after closing

YOUR NEXT TASKS

- Fill out our Team Survey
- A Notary will either come to your house or you will go to them to sign your closing documents
- Bring photo ID & reading glasses (If needed) to your signing appointment
- Review the Final Settlement Statement to be sure all numbers look correct
- You get to move in as soon as you get possession (Possession normally occurs when we receive
- recoding numbers from Escrow)
- Recommend that you change the locks
- Update the security system
- Invite neighbors over to acquaint yourselves