Listing Agent Checklist

From first seller contact through closing and follow up

Use one copy for each residential listing. Keep it with the listing file and work through the stages as the transaction progresses. The completed checklist should point to the supporting records in Dotloop.

Property address:

Seller names:

Agent:

Dotloop name or ID:

MLS number:

List price and target launch date:

Listing signed and expiration dates:

Contract date and target closing date:

How to use the checklist

Check an item when the action is complete and the required record is saved. For an item that does not apply, write its number and N/A in the section notes with a reason. Record unresolved items, the responsible person, and a due date. Obtain manager direction before omitting required office paperwork.

Commission policy

Century 21 Alliance has a minimum listing commission of 3%. Commissions are negotiable and are not set by law. [1] Obtain written manager approval before offering an exception. Record all agreed compensation terms in the approved documents.

Before public launch

- ☐ **P1** Required listing paperwork is fully executed and approved by the manager.
- ☐ **P2** The seller disclosure has received its separate manager review.
- ☐ **P3** The seller has authorized the launch, access arrangements, and marketing choices.
- ☐ **P4** The MLS plan, public-marketing timing, and property readiness have been checked.

01 First contact and the listing appointment

Establish the seller relationship and identify issues that could affect the listing before promising dates or results.

- [ ] **01.01** Record the referral source, property address, seller contact information, preferred communication method, and appointment date.
- [ ] **01.02** Ask whether the property is currently listed or subject to another brokerage agreement. Resolve any conflict with the manager before proceeding.
- [ ] **01.03** Provide and explain the current Consumer Information Statement at the required time; keep delivery and acknowledgment records. [1]
- [ ] **01.04** Identify all owners and decision makers. Arrange for everyone whose participation is needed to attend or join the appointment.
- [ ] **01.05** Ask about the reason for selling, desired closing date, next-home plans, financial constraints, and any purchase or relocation contingency.
- [ ] **01.06** Determine occupancy: owner occupied, vacant, tenant occupied, or occupied by someone other than the owner. Identify access and notice concerns.
- [ ] **01.07** Verify ownership and basic public-record information. Flag an estate, trust, LLC, power of attorney, divorce, bankruptcy, foreclosure, or disputed ownership for manager and attorney review.
- [ ] **01.08** Review prior MLS history, public records, current competition, recent sales, and relevant neighborhood conditions before the appointment.
- [ ] **01.09** Prepare the CMA, pre-listing packet, listing presentation, proposed marketing plan, and seller document request list.
- [ ] **01.10** Walk through the property with the seller. Record condition, improvements, known defects, potential safety issues, and questions requiring verification.
- [ ] **01.11** Discuss preparation, pricing, marketing, showings, communication, costs, and the seller's responsibilities. Record agreed next steps and owners.
- [ ] **01.12** Confirm the next appointment and follow-up dates. Send the seller a written recap and the document request checklist.

Section notes:

02 Seller documents and property records

Request copies early and save them securely. Use the section notes to identify anything missing, unavailable, or not applicable.

- ☐ **02.01** Confirm each seller's legal name, mailing address, phone, and email. Verify identity using the company's approved process without collecting unnecessary sensitive data.
- ☐ **02.02** Obtain the deed, prior title policy, survey or plot plan, and documents establishing signing authority when applicable.
- ☐ **02.03** Obtain a current property tax bill. Verify annual taxes, billing period, assessments, exemptions, abatements, and any known delinquency.
- ☐ **02.04** Obtain the latest water bill and sewer bill, including separate providers if applicable. Record billing cycles, service type, and known balances.
- ☐ **02.05** Request utility provider names and available electric, gas, oil, or propane usage information. Identify leased tanks, equipment, and recurring service charges.
- ☐ **02.06** Obtain prior inspection reports: general home, roof, structure, pest, radon, mold, chimney, sewer scope, well, septic, pool, and other available evaluations.
- ☐ **02.07** Collect receipts, permits, final approvals, warranties, and service records for repairs, renovations, additions, roof, HVAC, and major systems.
- ☐ **02.08** Request information about insurance claims, water intrusion, flooding, fire damage, remediation, and unresolved defects, with available supporting reports.
- ☐ **02.09** Obtain available flood insurance information, elevation certificates, and flood-related records. Have the seller complete the current flood disclosures. [2]
- ☐ **02.10** Obtain lead-based paint records and reports when applicable, plus any available lead-safe certificates for rental property. [3]
- ☐ **02.11** Record included and excluded appliances, fixtures, window treatments, equipment, and personal property. Identify items the seller intends to replace or remove.
- ☐ **02.12** Request mortgage and home-equity lender names and approximate balances for the net estimate. Route payoff authorizations and account details securely to the closing professional.
- ☐ **02.13** Ask about liens, judgments, unpaid contractor bills, tax appeals, pending assessments, and recorded restrictions. Refer title and legal questions to qualified professionals.
- ☐ **02.14** Collect keys, remote controls, gate or building access devices, manuals, warranty contacts, and service-provider details needed for showings or transfer.
- ☐ **02.15** Record each missing item, who will obtain it, and the due date. Do not mark a requested document complete until it is received or the exception is resolved.

Section notes:

03 HOA and special property records

Complete the applicable items for the property. Request documents early enough to address resale requirements and financing questions.

- ☐ **03.01** Identify every HOA, condominium association, master association, or other mandatory association and the management contact.
- ☐ **03.02** Request governing documents, bylaws, rules, restrictions, current fee schedules, and available resale or disclosure packages.
- ☐ **03.03** Verify regular dues, payment frequency, initiation or capital-contribution fees, transfer fees, special assessments, and any unpaid balance.
- ☐ **03.04** Request available association budgets, financial statements, reserve studies, insurance summaries, meeting minutes, and notices of litigation or major projects.
- ☐ **03.05** Confirm resale-certificate ordering steps, fees, turnaround time, approval or interview requirements, and any right of first refusal.
- ☐ **03.06** Verify association rules affecting signs, lockboxes, showings, rentals, pets, parking, amenities, renovations, and move-in or move-out arrangements.
- ☐ **03.07** For tenant-occupied property, obtain leases, amendments, rent records, security-deposit details, registrations, and required notices. Have counsel address access, possession, and tenant rights.
- ☐ **03.08** For solar or other financed equipment, obtain the lease, loan, or power-purchase agreement; document transfer, payoff, approval, and lien-release requirements.
- ☐ **03.09** For a private well, obtain available permits and test records. Identify whether the Private Well Testing Act applies and schedule the required testing process. [5]
- ☐ **03.10** For septic, obtain permits, design or as-built plans, pumping and service records, and inspection reports; verify local health authority requirements.
- ☐ **03.11** For oil tanks, obtain installation, removal, abandonment, testing, remediation, and closure records. Escalate missing records or contamination concerns.
- ☐ **03.12** For pools, waterfront features, docks, additions, finished basements, or converted spaces, obtain available permits and approvals; verify advertised uses and dimensions.
- ☐ **03.13** Identify historic, age-restricted, affordable-housing, deed-restricted, or unusual ownership conditions. Confirm resale limitations and required approvals with the proper authority.

Section notes:

04 Pricing and the listing agreement

Agree on the service, price, timing, and compensation before the launch. Use current approved forms and obtain all required signatures.

- [ ] **04.01** Review the CMA and competing listings with the seller. Document the recommended range, selected list price, and reasons for that price. Save the completed CMA in Dotloop.
- [ ] **04.02** Prepare and explain a preliminary seller net estimate using verified assumptions; identify estimates, payoff information still needed, and possible credits or costs.
- [ ] **04.03** Explain the Century 21 Alliance minimum listing commission of 3%. State that this is company policy; commissions are negotiable and are not set by law. [1]
- [ ] **04.04** Obtain written manager approval before offering any commission exception, rebate, credit, referral arrangement, or other nonstandard financial term, including friends and family situations.
- [ ] **04.05** Record the agreed commission calculation, payment terms, and any separately authorized buyer-broker compensation in the appropriate approved documents. Do not imply that the 3% minimum automatically establishes a buyer-broker payment.
- [ ] **04.06** Confirm the listing start and expiration dates, anticipated market date, possession plans, and the seller's availability for showings and negotiations.
- [ ] **04.07** Review the six-month marketing plan and initial launch calendar. Identify included services, optional expenses, approval requirements, and review dates.
- [ ] **04.08** Document the seller's choices concerning MLS exposure, public marketing, photos, video, signs, lockboxes, open houses, and any permitted limited-marketing arrangement.
- [ ] **04.09** Verify the property description, ownership names, price, inclusions, exclusions, contact details, dates, and every negotiated term before sending forms for signature.
- [ ] **04.10** Explain the documents and allow time for questions. Refer legal, tax, title, and estate questions to the appropriate professional.
- [ ] **04.11** Obtain signatures and dates from all necessary parties and the required brokerage signatory. Confirm signer authority rather than assuming one owner can sign for another.
- [ ] **04.12** Deliver complete executed copies to the seller, save them in Dotloop, and calendar listing expiration and scheduled pricing or marketing reviews.

Section notes:

05 Required Dotloop listing paperwork

Complete the five documents shown in the office required listing paperwork folder. Applicability and agency consent must be reviewed rather than assumed.

- [ ] **05.01** Consumer Information Statement. Use the current approved version; document delivery and obtain the required acknowledgment. [1]
- [ ] **05.02** Listing Agreement w/AG Letter (SJ Div). Use the office template, include the AG Letter, and verify every required page, signature, initial, and date.
- [ ] **05.03** Lead Paint Disclosure. Confirm applicability for most pre-1978 housing; provide the required pamphlet and available records, and obtain the necessary signatures. If inapplicable, document the reason and manager acceptance. [3]
- [ ] **05.04** Standard Form of Informed Consent to Dual Agency. Confirm the current office form title and applicable agency arrangement. Explain consent and document the seller's actual decision; consent is not automatic. [1]
- [ ] **05.05** Seller's Property Condition Disclosure Statement. Obtain the seller-completed, signed version, including current flood-risk questions or the required addendum. [1, 2]
- [ ] **05.06** Create the listing loop using the current office template. Confirm the property address, loop name, transaction type, agent, and sellers.
- [ ] **05.07** Check each participant's email and role. Limit access to the documents that person needs; protect financial, identity, and security information.
- [ ] **05.08** Add the company-required supporting forms and applicable disclosures for the actual transaction, including agency, marketing choices, and approved compensation documents.
- [ ] **05.09** Upload seller records, HOA documents, prior inspection reports, permits, and approvals into clearly named folders; separate internal records from materials approved for sharing.
- [ ] **05.10** Check completeness before requesting signatures. Confirm that blanks, selections, initials, dates, and all referenced attachments are addressed.
- [ ] **05.11** Verify that electronic signing is complete for every required signer. Save fully executed versions and the available signing record; retain the document history.
- [ ] **05.12** Submit the complete listing paperwork for manager review through the office process. Record the submission date and any outstanding requirements.
- [ ] **05.13** Resolve every returned correction, obtain any needed corrected signatures, and record the manager's approval. An upload alone does not complete the review.

Section notes:

06 Seller disclosure and manager approvals

Complete both manager reviews before launch. Keep seller answers, supporting records, and the advertising consistent.

- [ ] **06.01** Ask the seller to answer the disclosure from their own knowledge. Do not supply answers, guess, or change the seller's response without the seller's documented correction.
- [ ] **06.02** Review the disclosure for missing answers, signatures, dates, explanations, and attachments. Ask the seller to address incomplete or unclear responses.
- [ ] **06.03** Compare the disclosure with the walkthrough, prior reports, repair records, and known property history. Escalate inconsistencies for clarification.
- [ ] **06.04** Check flood-history and risk responses and attach required supporting information, including an available elevation certificate where required. [2]
- [ ] **06.05** Confirm applicable lead disclosures, records, and pamphlet delivery. Track the buyer's inspection opportunity and any written change or waiver when an offer is handled. [3]
- [ ] **06.06** Submit the Seller's Property Condition Disclosure Statement and supporting explanations to the manager for a separate review.
- [ ] **06.07** Obtain the manager's seller-disclosure review approval and resolve requested corrections before using the disclosure in the listing package.
- [ ] **06.08** Confirm that the manager has also approved the listing agreement, other required listing paperwork, and any commission or marketing exceptions.
- [ ] **06.09** Coordinate delivery of the completed seller disclosure to prospective buyers before they become contractually obligated; retain evidence of delivery. [1, 2]
- [ ] **06.10** Review which attachments may be shared through the MLS or with buyers. Remove unnecessary personal, account, and security details from approved copies.
- [ ] **06.11** Tell the seller to report newly discovered conditions or changes promptly. Update disclosures, notify the manager, and document required delivery of revisions.
- [ ] **06.12** Record launch approval only after required documents, reviews, seller instructions, and unresolved property issues have been addressed.

Section notes:

07 Home preparation photography and access

Prepare the property and access arrangements before photography and showings. Confirm that each activity is authorized for the listing status.

- ☐ **07.01** Give the seller a written preparation checklist with priorities, responsible people, costs, and target dates.
- ☐ **07.02** Confirm agreed repairs, decluttering, cleaning, staging, landscaping, and lighting are complete or accurately reflected in the marketing plan.
- ☐ **07.03** Ask the seller to secure valuables, medications, firearms, financial papers, family photographs, visible personal information, and devices containing private information.
- ☐ **07.04** Discuss cameras, microphones, smart locks, and alarm systems; obtain manager guidance on notices, access, and privacy before showings.
- ☐ **07.05** Schedule professional photography and approved video, floor plans, virtual tours, or drone services. Confirm permissions, usage rights, vendor cost, and weather backup.
- ☐ **07.06** Verify room counts, dimensions, square-footage sources, lot information, and improvements before creating captions, floor plans, or feature sheets.
- ☐ **07.07** Review the delivered photos and media for accuracy, image order, private information, and any required virtual-staging or alteration disclosures.
- ☐ **07.08** Confirm written sign authorization, association or municipal restrictions, and the approved public-marketing date before ordering or installing a sign.
- ☐ **07.09** Arrange sign installation in the approved location and verify completion, required brokerage identification, and safe placement.
- ☐ **07.10** Obtain lockbox authorization, install the lockbox, record its identifier and location securely, test the key, and confirm approved access with the seller.
- ☐ **07.11** Configure showing instructions, appointment notice, restricted hours, tenant requirements, pets, alarms, lights, and post-showing locking procedures.
- ☐ **07.12** Test appointment requests and access instructions. Keep lockbox combinations and security codes out of public remarks and public materials.
- ☐ **07.13** Complete a final readiness check with the seller and confirm the first date showings may occur under the selected MLS status.

Section notes:

08 MLS entry and listing launch

Coordinate entry, public marketing, signs, and showings with current Bright MLS rules and the seller's written instructions.

- [ ] **08.01** Verify the current Bright MLS entry deadline, public-marketing requirements, status choices, and any required seller authorization. Record the applicable deadline and assigned owner. [4]
- [ ] **08.02** Enter and review the property address, parcel, ownership type, property type, room counts, measurements and sources, taxes, utilities, and association information.
- [ ] **08.03** Verify price, dates, inclusions, exclusions, occupancy, possession terms, listing contacts, and all required listing fields.
- [ ] **08.04** Write accurate public remarks using verified property features. Review fair housing language and remove unsupported claims.
- [ ] **08.05** Place access and security instructions only in the appropriate private fields. Check that syndication will not expose confidential information.
- [ ] **08.06** Upload approved photos, floor plans, tours, and shareable attachments. Check the lead image, image order, rights, accuracy, and required disclosures.
- [ ] **08.07** Keep offers of broker compensation out of the MLS, including remarks, images, attachments, and links used to convey an offer. Use approved channels outside the MLS. [6]
- [ ] **08.08** Review a complete MLS draft with the seller for factual accuracy, and obtain any office-required sign-off without shifting the agent's verification responsibility.
- [ ] **08.09** Save the listing in the correct authorized status and confirm that the MLS number has been issued. Calendar any required status changes or future market date.
- [ ] **08.10** Check the live MLS display and major public displays for correct price, photos, facts, contacts, links, and showing availability; request corrections promptly.
- [ ] **08.11** Send the seller the live listing link and approved launch schedule. Explain when and how questions, showing feedback, and reports will be shared.
- [ ] **08.12** Confirm that sign installation, social posts, email, websites, and other public marketing match the approved launch timing and MLS requirements.
- [ ] **08.13** Save the final MLS printout and evidence of the launch check in Dotloop. Record the MLS number and live date on the listing overview.

Section notes:

09 Marketing materials and team handoffs

Assign each marketing task to a person, confirm delivery, and keep a copy of the approved materials with the listing file.

- ☐ **09.01** Send the MLS number to Larissa Scialabbo for social media marketing. Include the property address, approved price, listing link, photos, highlights, and any scheduled event.
- ☐ **09.02** Confirm Larissa received the request; record the requested posting date and approved channels, and review published information for accuracy.
- ☐ **09.03** Notify Lori Boiler and request the Financial Fact Sheet. Supply approved property information, price, taxes, association fees, and the MLS number when available.
- ☐ **09.04** Receive and review the Financial Fact Sheet with Lori for correct property facts, stated financing assumptions, dates, and required disclosures before sharing it.
- ☐ **09.05** Download all approved listing marketing materials available from Moxi Present and save the presentation PDF. Obtain any additional assigned assets through the office's Moxi marketing tools.
- ☐ **09.06** Review flyers, brochures, postcards, social graphics, property pages, and other available materials for correct facts, pricing, contact information, branding, and links.
- ☐ **09.07** Prepare the property marketing packet with approved disclosure access, feature information, floor plan, Financial Fact Sheet, and relevant association information.
- ☐ **09.08** Create or verify the property page and QR codes. Test every link on a phone and confirm it leads to the current listing or intended contact action.
- ☐ **09.09** Publish approved launch posts and email marketing; use permitted contact lists, required sender information, and the applicable opt-out process.
- ☐ **09.10** Complete cooperating-agent outreach and approved buyer-database follow-up. Record responses, representation information, and the next action.
- ☐ **09.11** Schedule the authorized open house or broker event; confirm staffing, access, promotion, seller preparation, and follow-up responsibilities.
- ☐ **09.12** Display the current required New Jersey agency notice at public showings and use the approved sign-in process. [1]
- ☐ **09.13** Log marketing expenses, vendor invoices, deadlines, and approvals. Keep optional spending within the agreed budget.
- ☐ **09.14** Save copies or links showing what was published and send the seller a launch summary with the next reporting date.

Section notes:

10 Active listing service and weekly reviews

Repeat the applicable tasks while the listing is active. Record dates and results in the seller update and contact log.

- ☐ **10.01** Monitor all inquiry channels and respond promptly. Assign backup coverage for calls, messages, showing requests, and urgent seller questions.
- ☐ **10.02** Track showings, inquiries, event attendance, marketing activity, and buyer or agent feedback without treating every online view as a qualified buyer.
- ☐ **10.03** Send the agreed weekly seller update, including activity, feedback, new competition, market changes, recommendations, and the next review date.
- ☐ **10.04** Check the home after showings or arrange an appropriate seller or vendor check. Resolve access, security, pet, maintenance, or cleanliness issues.
- ☐ **10.05** Recheck MLS and public listing displays for incorrect data, broken links, stale event details, or unauthorized use of images.
- ☐ **10.06** Review new listings, pending properties, closed sales, and competing price changes; update the CMA and seller net estimate as needed.
- ☐ **10.07** Revisit the six-month marketing plan at the agreed checkpoints and sooner if feedback or market conditions justify a change.
- ☐ **10.08** Discuss proposed price changes with the seller, document the decision, and obtain signed authorization and manager review as required before making the change.
- ☐ **10.09** After an approved price or status change, update the MLS and all active materials; notify Larissa and Lori when their materials need revision.
- ☐ **10.10** Follow up after open houses and inquiries with permission. Record useful feedback and next steps rather than only counting attendance.
- ☐ **10.11** Update the disclosure and manager whenever new defects, repairs, reports, or material property information arise; document required notices to interested parties.
- ☐ **10.12** Track expiration dates, vendor renewals, seller availability, and unresolved tasks. Obtain any authorized extension before continuing beyond the agreement term.

Section notes:

11 Offers negotiation and contract handoff

Track every offer and decision, then create a transaction calendar from the actual signed documents and attorney instructions.

- [ ] **11.01** Log the date and time each offer is received and present it promptly in accordance with legal duties and the seller's documented instructions.
- [ ] **11.02** Check the buyer's correct name, signatures, price, deposit, financing, contingencies, inclusions, requested credits, proposed closing, and possession terms.
- [ ] **11.03** Review lender preapproval or proof of funds through approved channels; clarify missing information without promising that financing is guaranteed.
- [ ] **11.04** Verify delivery of the seller disclosure, applicable lead disclosures, and other required information before the buyer is contractually obligated. [1, 2, 3]
- [ ] **11.05** Compare offers using net proceeds, contingencies, financing, timing, and risk. Keep the seller's decision and instructions in the file.
- [ ] **11.06** In multiple-offer situations, use the manager-approved process and seller instructions; keep confidential terms protected and document communications.
- [ ] **11.07** Document counters, extensions, acceptance, and any agreed credits or concessions in the approved written forms. Do not rely on a verbal understanding.
- [ ] **11.08** Confirm any buyer-broker compensation arrangement is separately documented as needed and matches the seller's authorization and brokerage agreements. [6]
- [ ] **11.09** Resolve any dual or designated agency issue with the manager and obtain the required informed written consents before proceeding in that role. [1]
- [ ] **11.10** Deliver complete executed documents to the parties and their attorneys; confirm receipt and preserve the delivery record in Dotloop.
- [ ] **11.11** Record the actual attorney-review status and instructions. Calendar review, deposit, inspection, financing, appraisal, title, association, and closing deadlines from the governing documents.
- [ ] **11.12** Notify the manager and assigned transaction coordinator; provide the signed contract, parties' contact details, deadline calendar, and outstanding issues.
- [ ] **11.13** Track escrow deposits and receipts through the authorized holder. Follow office procedures and escalate missing or late funds without handling money outside the approved process.
- [ ] **11.14** Update MLS status when required and legally appropriate; notify the seller, Larissa, Lori, vendors, and showing contacts of the authorized change.

Section notes:

12 Inspections financing title and approvals

Monitor the contract requirements and document completion. The signed contract and attorney directions control dates and remedies.

- [ ] **12.01** Coordinate buyer inspections and access, including utilities, pets, tenants, and safe access to the property. Track the inspection and response deadlines.
- [ ] **12.02** Deliver inspection-related requests and reports through the agreed process; discuss repair or credit decisions with the seller and appropriate professionals.
- [ ] **12.03** Obtain written repair, credit, extension, or other agreements. Calendar completion dates and retain invoices, permits, warranties, and verification.
- [ ] **12.04** Update the seller disclosure when new material information is learned, including information from an unsuccessful transaction; obtain manager guidance on required delivery.
- [ ] **12.05** Track appraisal scheduling and access; supply verified property facts and relevant information through permitted channels. Escalate an appraisal issue promptly.
- [ ] **12.06** Monitor financing and commitment deadlines with the buyer's agent or lender as authorized. Obtain written extensions before deadlines lapse when required.
- [ ] **12.07** Confirm that the closing professional has ordered title work, tax and lien searches, payoffs, survey work if needed, and other required items.
- [ ] **12.08** Track resolution of title defects, judgments, estate or entity authority, lien releases, and solar or equipment transfers with the attorney or closing professional.
- [ ] **12.09** Order required association resale documents, account balances, approvals, and move arrangements; verify delivery and any buyer review requirements.
- [ ] **12.10** For a property subject to the Private Well Testing Act, obtain compliant results and track buyer and seller receipt, review, and written certification before closing. [5]
- [ ] **12.11** Track required septic, water, sewer, environmental, or other property-specific inspections and approvals, including repairs and reinspection.
- [ ] **12.12** Confirm municipal resale or occupancy requirements and applicable smoke, carbon monoxide, and fire-extinguisher certifications; schedule inspections early enough for corrections. [7]
- [ ] **12.13** Verify the seller's moving plan, cleanout, possession date, utility-transfer plan, and any attorney-approved occupancy agreement.
- [ ] **12.14** Update the transaction calendar and seller regularly; escalate missed deadlines, unresolved contingencies, and possible closing delays to the manager and attorney.

Section notes:

13 Final preparation and closing

Confirm that the property, paperwork, funds, and possession arrangements are ready before releasing keys.

- [ ] **13.01** Confirm closing date, time, location or remote process, all signers, identification requirements, and any approved power of attorney with the closing professional.
- [ ] **13.02** Verify completed repairs, receipts, permits, warranties, final certifications, association approvals, and required reinspection documents are delivered.
- [ ] **13.03** Confirm final water and sewer readings, balances, tax information, and association account information requested for closing adjustments.
- [ ] **13.04** Review the seller's closing figures with the appropriate professional, including price, credits, payoffs, prorations, fees, commission, and expected proceeds.
- [ ] **13.05** Submit the office commission-disbursement or accounting documents and obtain required approval; reconcile compensation with the executed agreements.
- [ ] **13.06** Remind the seller to verify wiring instructions using a trusted phone number obtained independently. Follow the closing professional's secure process for proceeds and banking information.
- [ ] **13.07** Confirm the home is vacated as agreed, cleaned, and free of excluded belongings and trash; verify agreed appliances and fixtures remain.
- [ ] **13.08** Keep utilities and required insurance in place through the agreed transfer point; coordinate the seller's changes with the closing and possession arrangements.
- [ ] **13.09** Coordinate the buyer's final walkthrough and promptly route unresolved issues to the seller, manager, and attorneys for written resolution.
- [ ] **13.10** Collect house keys, remotes, access devices, mailbox keys, manuals, warranties, and agreed transfer information; arrange smart-device account removal securely.
- [ ] **13.11** Confirm the closing professional has authorized possession and release of keys under the contract. Do not release solely because documents have been signed.
- [ ] **13.12** Obtain the final closing statement and confirmation of completed closing, funding or disbursement as appropriate; save the approved records in Dotloop.
- [ ] **13.13** Confirm the seller received the expected documents and knows whom to contact about proceeds, payoff processing, taxes, or unresolved post-closing obligations.

Section notes:

14 After closing and file completion

Finish the property and office tasks, then maintain the client relationship with permission.

- [ ] **14.01** Update the MLS to the correct closed status within the applicable deadline; verify sale date, price, financing, and required reporting fields.
- [ ] **14.02** Notify Larissa, Lori, the transaction coordinator, and the manager that the sale has closed and identify any authorized final marketing task.
- [ ] **14.03** Arrange removal of the sign and lockbox; confirm removal and account for keys, equipment, brochures, and open-house signs.
- [ ] **14.04** Stop active listing advertising, scheduled posts, paid campaigns, and showing requests; update property pages and correct outdated marketing.
- [ ] **14.05** Verify commission receipt and approved accounting allocations with the office; resolve outstanding invoices, referral payments, and approved reimbursements.
- [ ] **14.06** Complete the Dotloop file with executed agreements, amendments, disclosures, delivery records, reports, approvals, escrow evidence, and closing documents.
- [ ] **14.07** Submit the completed transaction file for final manager or compliance review; correct returned items and obtain the office's file-complete confirmation.
- [ ] **14.08** Retain and archive records according to office and legal requirements, preserve required lead-disclosure records, and remove unneeded access permissions. [3]
- [ ] **14.09** Thank the seller, confirm their preferred forwarding contact information, and ask about any unresolved moving or property-transfer issue.
- [ ] **14.10** Request a review or testimonial and permission for any sold announcement, photographs, or client story. Protect the seller's private information.
- [ ] **14.11** Update the CRM, client preferences, and follow-up schedule; schedule the agreed check-in, home anniversary, and future real estate conversations.
- [ ] **14.12** Review the listing results, seller feedback, marketing costs, and lessons learned. Record improvements for the next listing.

Section notes:

15 Expiration withdrawal or canceled transaction

Use this section when the property does not close as planned. A listing cancellation and a sales-contract termination are separate matters.

- [ ] **15.01** Identify exactly what is ending or changing: listing term, marketing status, brokerage relationship, or purchase contract. Consult the manager and attorney as appropriate.

- [ ] **15.02** Obtain the required signed extension, withdrawal, cancellation, release, or termination document. Do not treat an email or MLS status change as a complete release.

- [ ] **15.03** Confirm ongoing duties, protection-period provisions, outstanding costs, and any continuing agreement with the manager; explain the approved next steps to the seller.

- [ ] **15.04** For a canceled purchase contract, follow written attorney instructions and the escrow holder's procedures. Do not direct release of disputed funds without authority.

- [ ] **15.05** Update the MLS accurately within the applicable deadline and stop or change showings, advertising, property pages, and scheduled campaigns as authorized.

- [ ] **15.06** Notify Larissa, Lori, the transaction coordinator, vendors, and affected parties of the approved change; avoid unnecessary disclosure of confidential reasons.

- [ ] **15.07** Arrange sign and lockbox removal when appropriate, return keys and seller property, and confirm the home is secure.

- [ ] **15.08** Before returning to market, review new inspection information, revise disclosures and marketing facts, confirm authority and status, and obtain the required manager approvals.

- [ ] **15.09** Complete the Dotloop record and final review even if the property does not sell. Document the seller's next plan and any permitted follow-up.

Section notes:

Office review and additions

Use this page to add office-specific forms, routing instructions, deadlines, and tasks before adopting the checklist as a standard office procedure.

- [ ] **R1** Confirm the exact live Dotloop template names, including the dual-agency form and Seller's Property Condition Disclosure Statement, and list any additional mandatory forms.
- [ ] **R2** Confirm how the 3% minimum is applied in the listing agreement, how any separately authorized buyer-broker compensation is documented, and who approves exceptions.
- [ ] **R3** Confirm the manager review routing, required supporting records, turnaround expectations, and final approval record for listing paperwork and seller disclosures.
- [ ] **R4** Confirm the Moxi Present downloads and any Moxi Impress or other marketing assets agents are expected to obtain for every listing.
- [ ] **R5** Confirm the Larissa Scialabbo social-media handoff and Lori Boiler Financial Fact Sheet process, including request method and expected lead time.
- [ ] **R6** Add office-specific accounting, transaction coordinator, escrow, canceled-file, record-retention, and final-compliance procedures.

Additional required forms:

Additional office steps:

Manager review name and date:

Next revision date:

References and use notes

Use current office forms and current MLS instructions for each transaction. The signed agreements and attorney directions control contractual dates. Confirm property-specific requirements with the manager and the applicable municipal, association, or professional contact. References reviewed October 26 2026.

[1] New Jersey Department of Banking and Insurance Bulletin 24 11

Agency relationships, CIS, brokerage agreements, compensation, seller disclosures, and public-showing signage.

https://www.nj.gov/dobi/bulletins/blt2411.pdf

[2] New Jersey DEP Flood Disclosure Law

Flood-risk information and disclosure timing.

https://dep.nj.gov/flooddisclosure/

[3] US EPA Real Estate Lead Disclosures

Most pre-1978 housing, records, pamphlets, inspection opportunity, and retention.

https://www.epa.gov/lead/real-estate-disclosures-about-potential-lead-hazards

[4] NAR MLS Clear Cooperation Policy

Public marketing and submission obligations. Confirm current Bright MLS implementation and local entry rules for each listing.

https://www.nar.realtor/about-nar/policies/mls-clear-cooperation-policy

[5] New Jersey DEP Private Well Testing Act

Applicable sale transactions, testing, review, and written certification.

https://dep.nj.gov/privatewells/pwta/

[6] NAR Broker to Broker Agreements

Compensation agreements and prohibition on MLS offers of compensation.

https://www.nar.realtor/the-facts/broker-to-broker-agreements-101

[7] New Jersey municipal resale requirements

Verify the property's own municipality. Official examples describe occupancy and fire-safety checks; local procedures vary.

https://www.wyckoffnj.gov/fire-prevention/pages/smoke-detector-carbon-monoxide-detector-fire-extinguisher-compliance

Office contacts

Bob Latigona | Broker Associate and Cherry Hill Branch Manager
South Jersey Regional Trainer | 609-876-7689

Larissa Scialabbo | Social media marketing
Lori Boiler | Financial Fact Sheet request

Transaction coordinator and contact:

Office routing or reference links: