

TRANSMITTAL AND STACK SHEET ON SALE

For Administrative File Review

NOTE: This form is used by an agent as a checklist when preparing to close a sales transaction, to identify and gather all reports and documents affecting interests of the buyer, seller and employing broker and hand the form and the stack of all items gathered to the employing broker for supervisory review.

Date prepared _____, 20_____, by _____.

Manager's Notes

Listing Documents:

- Listing Information Report – For Broker’s Administrative Use [RPI Form 522]
- Property Sold Report – Administrative and Fee-Sharing Information [RPI Form 523]
- Seller’s Listing Agreement – Exclusive Right to Sell, Exchange or Option [RPI Form 102]
- Agency Law Disclosure – Real Estate Agency Relationships [RPI Form 305]
- Comparative Market Analysis for Setting Values [RPI Form 318]
- Good Faith Estimate of Seller’s Net Proceeds – On Sale of Property [RPI Form 310]
- Listing Package Cost Sheet – Due Diligence Checklist [RPI Form 107]
- Work Authorization [RPI Form 108]
- Federal Residency Declarations – Citizen Status [RPI Form 301]
- Seller’s Real Estate Withholding Certificate [RPI Form 301-1]
- Other _____

Marketing Documents:

- MLS/Listing Profile Sheet (Seller-approved copy)
- Promotional Flyer (Seller-approved copy)
- Property Profile (title company)
- Other _____

Authority to Provider for Services:

- Authorization for Home Inspection Report [RPI Form 130]
- Authorization to Prepare Natural Hazard Disclosure [RPI Form 131]
- Authorization to Structural Pest Control Operator [RPI Form 132]
- Authorization to Provide Services – General Services [RPI Form 133]

Name of Provider _____

Property Disclosures Delivered to Prospective Buyers:

- Condition of Property Disclosure – Transfer Disclosure Statement [RPI Form 304]
- Natural Hazard Disclosure Statement [RPI Form 314]
- Lead-Based Paint Disclosure – On Sale of Real Estate [RPI Form 313]
- Residential Earthquake Hazards Report [RPI Form 315]
- Seller’s Neighborhood Security Disclosure [RPI Form 321]
- Property Expense Report [RPI Form 306]
- Ordinance Compliance – Local Option Disclosure [RPI Form 307]
- Certificate of Occupancy, Conservation, Retrofit
- Home Inspector’s Report (HIR)
- Structural Pest Control Operator’s Report, Clearance
- Request for Notice of Mello-Roos Assessment [RPI Form 137]
- Condo (CID) CC&Rs, Articles, By-laws, Collection Policy, Budget, etc.
- Other _____
- Other _____

Offer and Acceptance:

- Purchase Agreement [RPI Forms 150, etc.]

Mandatory provisions as contained in Purchase Agreement:

- | | |
|---|---|
| <input type="checkbox"/> Sexual Predator Website, | <input type="checkbox"/> Agency Confirmation, |
| <input type="checkbox"/> Supplemental Tax Bills, | <input type="checkbox"/> Smoke Detector Compliance, |
| <input type="checkbox"/> Water Heater Anchor, | <input type="checkbox"/> Airport Influence Area, |
| <input type="checkbox"/> Ordinance Location, | <input type="checkbox"/> Industrial Zoning. |

- Counteroffer [RPI Form 180]
- Copy of Deposit Check from Buyer
- Agency Law Disclosure – Real Estate Agency Relationships [RPI Form 305]
- Short Sale Addendum – Loan Discount Approval Contingency [RPI Form 274]
- Backup Offer Addendum – Cancellation of Prior Sale [RPI Form 276]
- Court Confirmation Addendum – A Contingency Provision [RPI Form 278]
- Leasing and Operating Addendum [RPI Form 275]
- Personal Property Inventory – Transferred with Real Estate [RPI Form 256]
- Financial Disclosure Statement – For a Seller Carryback Note [RPI Form 300]
- Affiliated Business Arrangement Disclosure Statement [RPI Form 256]
- Conflict of Interest Disclosure [RPI Form 527]
- Compensation Disclosure in a Real Estate Transaction [RPI Form 119]
- Other _____
- Other _____

Closing Documents:

- Property Inspection – Request for Repairs [RPI Form 269]
- Preliminary Title Report Approval
- Sale of Other Property Waiver Provision [RPI Form 182-1]
- Waiver of Contingency [RPI Form 182]
- Release of Recorded Instrument [RPI Form 409]
- Interim Occupancy Agreement – Receipt for Rent and Security Deposit [RPI Form 271]
- Holdover Occupancy Agreement [RPI Form 272]
- Credit Application – Individual [RPI Form 302]
- Authorization to Open Home Warranty Order [RPI Form 134]
- Final Walk-Through Inspection – Condition-of-Property Confirmation [RPI Form 270]
- Disposition of Security Deposit on Sale of Tenant-Occupied Premises [RPI Form 586]
- Other _____
- Other _____

Buyer Representation Documents:

- Good Faith Estimate of Buyer's Costs – On Acquisition of Property [RPI Form 311]
- Escrow's Receipt of Buyer's Deposit
- Adjustable Rate Mortgage (ARM) Disclosure Worksheet [RPI Form 320]
- Loan Assumption Agreement (Lender forms)
- Other _____

Closing Activity:

- Escrow Instructions – Buyer and Seller Instructions [RPI Form 401]
- Supplemental Instructions _____
- Settlement Statement for _____ [RPI Form 402]
- File Activity Sheet [RPI Form 520]