



TRANSMITTAL AND STACK SHEET ON SALE

For Administrative File Review

Prepared by: Agent _____
Broker _____

Phone _____
Email _____

NOTE: This stack sheet is used when a sales escrow is opened and prior to closing to gather all forms and documents which may affect the rights and obligations of the Buyer or Seller. To use this stack sheet, check the appropriate boxes to indicate the items included in the stack. Leave items blank or unchecked to indicate they do not exist in this transaction.

Date prepared _____, 20____, by _____.

Manager's Notes

Listing Documents:

- ☐ Listing Information Report – For Broker's Administrative Use [ft Form 522]
- ☐ Property Sold Report – Administrative and Fee-Sharing Information [ft Form 523]
- ☐ Seller's Listing Agreement – Exclusive Right to Sell, Exchange or Option [ft Form 102]
- ☐ Agency Law Disclosure – Real Estate Agency Relationships [ft Form 305]
- ☐ Comparative Market Analysis for Setting Values [ft Form 318]
- ☐ Good Faith Estimate of Seller's Net Proceeds – On Sale of Property [ft Form 310]
- ☐ Listing Package Cost Sheet – Due Diligence Checklist [ft Form 107]
- ☐ Work Authorization [ft Form 108]
- ☐ Federal Residency Declarations – Citizen Status [ft Form 301]
- ☐ Seller's Real Estate Withholding Certificate [ft 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 [ft Form 130]
- ☐ Authorization to Prepare Natural Hazard Disclosure [ft Form 131]
- ☐ Authorization to Structural Pest Control Operator [ft Form 132]
- ☐ Authorization to Provide Services – General Services [ft Form 133]

Name of Provider _____

Property Disclosures Delivered to Prospective Buyers:

- ☐ Condition of Property Disclosure – Transfer Disclosure Statement [ft Form 304]
- ☐ Natural Hazard Disclosure Statement [ft Form 314]
- ☐ Lead-Based Paint Disclosure – On Sale of Real Estate [ft Form 313]
- ☐ Residential Earthquake Hazards Report [ft Form 315]
- ☐ Seller's Neighborhood Security Disclosure [ft Form 321]
- ☐ Property Expense Report [ft Form 306]
- ☐ Ordinance Compliance – Local Option Disclosure [ft 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 [ft Form 137]
- ☐ Condo (CID) CC&Rs, Articles, By-laws, Collection Policy, Budget, etc.
- ☐ Other _____
- ☐ Other _____

Offer and Acceptance:

☐ Purchase Agreement [ft 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"/> Ordnance Location, | <input type="checkbox"/> Industrial Zoning. |

☐ Counteroffer [ft Form 180]

☐ Copy of Deposit Check from Buyer

☐ Agency Law Disclosure – Real Estate Agency Relationships [ft Form 305]

☐ Short Sale Addendum – Loan Discount Approval Contingency [ft Form 274]

☐ Backup Offer Addendum – Cancellation of Prior Sale [ft Form 276]

☐ Court Confirmation Addendum – A Contingency Provision [ft Form 278]

☐ Leasing and Operating Addendum [ft Form 275]

☐ Personal Property Inventory – Transferred with Real Estate [ft Form 256]

☐ Financial Disclosure Statement – For a Seller Carryback Note [ft Form 300]

☐ Affiliated Business Arrangement Disclosure Statement [ft Form 256]

☐ Conflict of Interest Disclosure [ft Form 527]

☐ Compensation Disclosure in a Real Estate Transaction [ft Form 119]

☐ Other _____

☐ Other _____

Closing Documents:

☐ Property Inspection – Request for Repairs [ft Form 269]

☐ Preliminary Title Report Approval

☐ Sale of Other Property Waiver Provision [ft Form 182-1]

☐ Waiver of Contingency [ft Form 182]

☐ Release of Recorded Instrument [ft Form 409]

☐ Interim Occupancy Agreement – Receipt for Rent and Security Deposit [ft Form 271]

☐ Holdover Occupancy Agreement [ft Form 272]

☐ Credit Application – Individual [ft Form 302]

☐ Authorization to Open Home Warranty Order [ft Form 134]

☐ Final Walk-Through Inspection – Condition-of-Property Confirmation [ft Form 270]

☐ Disposition of Security Deposit on Sale of Tenant-Occupied Premises [ft Form 586]

☐ Other _____

☐ Other _____

Buyer Representation Documents:

☐ Good Faith Estimate of Buyer's Costs – On Acquisition of Property [ft Form 311]

☐ Escrow's Receipt of Buyer's Deposit

☐ Adjustable Rate Mortgage (ARM) Disclosure Worksheet [ft Form 320]

☐ Loan Assumption Agreement (Lender forms)

☐ Other _____

Closing Activity:

☐ Escrow Instructions – Buyer and Seller Instructions [ft Form 401]

☐ Supplemental Instructions _____

☐ Settlement Statement for _____ [ft Form 402]

☐ File Activity Sheet [ft Form 520]