



Homebuyer Checklist



Agent Name

Brokerage Name

Phone #

Website

HOME BUYER CHECKLIST

USE THIS CHECKLIST TO GUIDE YOU THROUGH THE HOME-BUYING PROCESS AND
KEEP TRACK OF IMPORTANT DETAILS.

Step 1: Determine Affordability

- ☐ Price range (highest):
- ☐ Price range (lowest):
- ☐ Target monthly mortgage:
- ☐ Other expenses:
- ☐ Household income:
- ☐ Debt amount:
 - Monthly debt payment:
- ☐ Credit score:
 - Credit score goal(s):
- ☐ Down payment amount:
 - Est. % of home price

Step 2: Choose a Lender

Lender's name:

Lender's company:

- ☐ Gather financial documents:
- ☐ Proof of Income
- ☐ Proof of Assets
- ☐ Meet credit score goal
- ☐ Employment verification
- ☐ Other documentation
- ☐ Submit financial documents

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Step 2: Choose a Lender

☐ Choose a Mortgage Loan:

- Loan type:
- Loan amount:
- Monthly payment:
- Payment length:
- Interest rate:

☐ Get prequalified

☐ Get preapproved

Step 3: Choose a Real Estate Agent

- Name:
- Brokerage:

☐ Discuss commission, closing costs, fees, etc.

☐ Sign buyer's agreement

Step 4: Choose Your Top Locations

- Zip code #1:
- Zip code #2:
- Zip code #3

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Step 5: Find a Home (Preferences)

- # of Bedrooms:
- # of Bathrooms:
- Age of Home:
- Square footage:
- ☐ Backyard?
- ☐ Garage/carport?
- ☐ Other features:

Step 6: Showings & Open Houses

Step 7: Submit Offer

- Offer amount:
- Escalation cap:
- Contingencies?
- Preferred move-in date:
- Terms of contract:
- ☐ Get offer approved by lender
- ☐ Determine the earnest deposit amount

Step 8: Get Offer Accepted

- ☐ Submit earnest deposit

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Step 9: Complete Home Inspection

- ☐ Request repairs?
- ☐ Renegotiate offer?
- ☐ Add contingencies?

Step 10: Complete Appraisal

- Appraisal value:

Step 11: Complete Closing Process

- ☐ Contingency complete date:
- ☐ Sign important documents:
- ☐ Settlement statement
- ☐ The deed (if paid in-full)
- ☐ The promissory note
- ☐ The Deed of trust/mortgages
- ☐ Complete the title process
- ☐ Close ESCROW

Step 12: Get Keys & Move In!

- ☐ Apply for homeowner's insurance
- ☐ Write a testimonial for your real estate agent