

Pre-Closing Checklist

As you prepare for the closing of your home sale, it's important to make sure that you have all of the necessary items and have completed all necessary tasks. To ensure a smooth closing process, please review and complete the items on this checklist.

PRIOR TO CLOSING

- | | |
|--|---|
| <input type="checkbox"/> Start, stop, or move services: Utility, home insurance, electric, internet, gas, etc. | <input type="checkbox"/> Forward your mail to your new address. |
| <input type="checkbox"/> Clean your house thoroughly or hire a cleaning service | <input type="checkbox"/> Notify your HOA of the sale and upcoming change of ownership. |
| <input type="checkbox"/> Collect all the manuals, warranties, and receipts for appliances. | <input type="checkbox"/> Make arrangements for the transfer of any warranties or service agreements for home systems (e.g. alarm system, lawn service, etc.). |
| <input type="checkbox"/> Shut off water valves. | <input type="checkbox"/> Review all statements and disclosures to ensure that all costs and fees are accurate and that you understand the terms of the sale. |
| <input type="checkbox"/> Remove all personal items and belongings from the home, including furniture, decor, and clothing. | |

BRING TO CLOSING

- | | |
|--|---|
| <input type="checkbox"/> Keys and/or security codes for the home, as well as any remotes for appliances (garage door, HVAC, etc) | <input type="checkbox"/> Final utility bills to be paid at closing |
| <input type="checkbox"/> Photo identification (two forms of ID) for all sellers listed on the home contract | <input type="checkbox"/> Cashier's check or proof of wire transfer to cover closing costs |
| | <input type="checkbox"/> Proof of any repairs made as per the home inspection report |



Ann-Marie Bortz

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Moving Checklist

MOVING PREPARATIONS

- ☐ Declutter, discard & donate
- ☐ Purchase packing supplies
- ☐ Create a file of moving-related papers and receipts
- ☐ Collect quotes from moving companies, choose a mover and schedule service
- ☐ Secure off-site storage if needed
- ☐ Discontinue additional home services (housekeeper, gardener/lawn service)
- ☐ Arrange time off work and childcare and/or pet care on moving day
- ☐ Notify HOA about upcoming move, reserve elevator usage (if applicable)
- ☐ Pack an essentials box for quick access at new home (toiletries, medications, toilet paper, hand soap, basic tools, paper towels/cleaning supplies, pet food/supplies, hangers, etc)
- ☐ Label moving boxes with the contents inside
- ☐ Final cleaning, lock up house, dispose of trash, leave any keys and garage door openers

NOTIFY ABOUT CHANGE OF ADDRESS

- ☐ Post Office
- ☐ DMV
- ☐ Employer
- ☐ Banks & Loan Companies
- ☐ Lawn/Home Services
- ☐ Insurance Companies
- ☐ Doctors, Lawyers, Accountant, etc.
- ☐ Subscriptions
- ☐ Family + Friends

START/STOP/MOVE SERVICES

- ☐ Electric
Can set up online at [website]
- ☐ Utilities
Call [County] to set up [###-###-####]
- ☐ Internet/TV/Phone
Can set up online at [website]
- ☐ Gas
Can set up online at [website]



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- Notify your HOA of the sale and upcoming change of ownership.
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