

10 Steps from Executed Contract to new home by builder  
 After all Design Selections & final contract

CL= Closing Date  
 EF=Effective Date

# = responsible person/s

As of  
 4/4/2018

| Step #                                      | To-Do:                            | Start ** | Due Date          | DONE? | BY:   |       |         |       |       | Notes                              |
|---|-----------------------------------|----------|-------------------|-------|-------|-------|---------|-------|-------|------------------------------------|
|   |                                   |          |                   |       | Buyer | Nancy | List A. | Build | Other |                                    |
| 1.0 Mortgage:                               |                                   |          |                   |       |       |       |         |       |       |                                    |
| 1.1   | Finalize/estimate/lock best rate  |          | CL-60             | #     |       |       |         |       | #     |                                    |
| 1.2   | Copy of contract to chosen Lender |          |                   | #     | #     |       |         |       |       |                                    |
| 1.3   | Submit all required paperwork     |          |                   | #     |       |       |         |       |       |                                    |
| 1.4   | Appraisal                         |          | CL-24             | #     |       |       |         |       | #     |                                    |
| 1.5   | Survey                            | ?        |                   | #     |       |       |         |       | #     | If desired, bank arranges          |
| 1.6   | Get final loan approval           | asap     | CL-3              | #     |       |       |         |       | #     |                                    |
| 2.0 Lawyer:                                 |                                   |          |                   |       |       |       |         |       |       |                                    |
| 2.1   | Schedule closing date & time      | asap     | EF+1              | #     | #     |       |         |       | #     |                                    |
| 2.2   | Executed contract & forms         |          | EF+1              | #     | #     |       |         |       |       |                                    |
| 2.3   | Wiring instruction                |          | CL-4              | #     | no!   |       |         |       | #     | Don't include agent on wiring info |
| 3.0 Meeting with Construction manager +/-or |                                   |          |                   |       |       |       |         |       |       |                                    |
|   | Updated Building timeline         |          | CL-4mo<br>ongoing | #     | #     |       |         |       | #     |                                    |
| 4.0 Pre-drywall if applicable               |                                   |          |                   |       |       |       |         |       |       |                                    |
| 4.1   | Schedule agreed dates             | open     |                   | #     | #     |       |         |       | #     |                                    |
| 4.2   | Overall House Inspection          |          |                   | #     | #     |       |         |       | #     |                                    |
| 4.3   | Review items with Builder         |          |                   | #     | #     |       |         |       | #     |                                    |
| 4.4   | Ensure Selections are being met   |          |                   | #     | #     |       |         |       | #     |                                    |
| 5.0 Schedule movers/pack                    |                                   |          |                   |       |       |       |         |       |       |                                    |
|   |                                   | CL-28    | CL                | #     |       |       |         |       |       |                                    |
| 6.0 Insurance:                              |                                   |          |                   |       |       |       |         |       |       |                                    |
| 6.1   | Title Insurance- req by bank      | CL-14    | CL-1              | #     |       |       |         |       | #     |                                    |
| 6.2   | Title Insurance-add optional      |          | ?                 | #     |       |       |         |       | #     |                                    |
| 6.3   | Home Insurance                    | CL-14    | CL-1              | #     |       |       |         |       |       |                                    |
| 7.0 Final Walk through with Builder         |                                   |          |                   |       |       |       |         |       |       |                                    |
| 7.1   | Schedule Inspector day/s before   | CL-14    | CL-3              |       | #     |       |         |       | #     |                                    |

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|--------------------------------------|--------------------------------------|----------|----------|-------|-------|-------|---------|-------|-------|------------------------------------|
|                                      |                                      |          |          |       | Buyer | Nancy | List A. | Build | Other |                                    |
| 7.2                                  | Final Inspection done                | CL-14    | CL-2     |       | #     | #     |         |       |       | Share report with builder          |
| 7.3                                  | Have list of ^ Punch list repairs    |          | CL-2     |       |       |       |         | #     |       |                                    |
| 7.4                                  | Termite & Radon                      | varies   |          |       | #     | #     |         |       | #     | Radon test time varies per builder |
| 7.5                                  | Septic/Water if applicable           | open     |          |       | #     | #     |         |       | #     |                                    |
| 7.6                                  | Walk through again with Builder      |          | CL-1     |       | #     | #     |         | #     |       |                                    |
| 7.7                                  | Items to be fixed before closing     |          | CL-1     |       | #     |       |         |       | #     |                                    |
| 7.8                                  | List of post closing items to lawyer |          | CL-1     |       | #     | #     |         | #     |       |                                    |
| 8.0 Utilites:                        |                                      |          |          |       |       |       |         |       |       |                                    |
| 8.1                                  | Change address                       | CL-14    | CL       |       | #     |       |         |       |       |                                    |
| 8.2                                  | Add electric                         | CL-14    | CL       |       | #     |       |         |       |       | In Builder's Info pack             |
| 8.3                                  | Add phone, internet, cable           | CL-14    | CL       |       | #     |       |         |       |       |                                    |
| 8.4                                  | Add gas                              | CL-14    | CL       |       | #     |       |         |       |       |                                    |
| 8.5                                  | Update alarm info?                   | CL-14    | CL       |       | #     |       |         |       |       |                                    |
| 9.0 Warranty & Appliances Info books |                                      |          |          |       |       |       |         |       |       |                                    |
|                                      |                                      | CL-14    | option   |       | #     | #     |         | #     | #     | BHHS has additional years warranty |
| 10 Closing                           |                                      |          |          |       |       |       |         |       |       |                                    |
|                                      | HUD                                  |          | CL-3     |       | #     | #     | #       |       | #     |                                    |
|                                      | Certified or wire funds              | CL-5     | CL-1     |       | #     |       |         |       |       |                                    |
|                                      | Bring photo id, Insurance, funds     |          | CL       |       | #     |       |         |       |       |                                    |
|                                      | Transfer keys, garage fobs           |          | CL       |       | #     |       |         | #     |       |                                    |
|                                      | Possibly change locks >move          |          | CL+1     |       | #     |       |         |       |       |                                    |

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