[Company name]

How to use this document: delete this paragraph before saving, sharing, or circulating it. Every part shown in blue is yours to replace: type your own details over each blue [field] until no blue remains. Then select all (Ctrl+A) and set the font colour to the same dark colour throughout. What is left is your finished document.

Estate agency closing checklist

Exchange to completion - nothing forgotten at the finish line.

Property: _____

Client: _____

Checks

[ ] Contracts exchanged - date confirmed Yes **[ ]** No **[ ]** N/A **[ ]**

[ ] Completion date agreed and diarised Yes **[ ]** No **[ ]** N/A **[ ]**

[ ] Funds / deposit arrangements confirmed Yes **[ ]** No **[ ]** N/A **[ ]**

[ ] Searches and enquiries satisfied Yes **[ ]** No **[ ]** N/A **[ ]**

[ ] Keys / access arrangements confirmed Yes **[ ]** No **[ ]** N/A **[ ]**

[ ] Meter readings arranged for completion day Yes **[ ]** No **[ ]** N/A **[ ]**

[ ] Removal / move-in logistics confirmed with client Yes **[ ]** No **[ ]** N/A **[ ]**

[ ] Final statement and invoice prepared Yes **[ ]** No **[ ]** N/A **[ ]**

[ ] File closed and archived Yes **[ ]** No **[ ]** N/A **[ ]**

[ ] Review / testimonial requested Yes **[ ]** No **[ ]** N/A **[ ]**

Actions required [List any issues found and what was done]

Sign-off

Checked by: _____ **Signature:** _____ **Date:** _____