

CONTRACTS / PREPARATION ONLY

Purchase terms worksheet

Organize the proposed deal terms before your local attorney or closing professional prepares the contract.

Preparation worksheet only. This is not a purchase agreement, assignment agreement or authorization. Do not sign it as a contract.

Property address / parcel and legal description

Proposed seller legal name(s) and proposed buyer legal name

Purchase price / deposit / balance and payment method

Deposit holder and deposit delivery deadline

Target closing date and closing / title company

Possession, occupants and personal property included or excluded

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Review before contracting

Record the items that need to be resolved with your local attorney and closing team.

Inspection period, access arrangements and investigation deadlines

Title, liens, taxes, HOA, easements and other known issues

Disclosures and required attachments to be reviewed locally

Who pays each closing cost / prorations / existing deposits

Assignment, marketing, cancellation and default terms for attorney review

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Assignment terms worksheet

Use this checklist to brief the closing team. It does not transfer or create any rights in a contract.

Underlying purchase agreement date and property identification

Assignor / assignee legal names and authority

Seller consent or other assignment restrictions to verify

Underlying purchase price / assignment fee / total buyer cost

Deposit amount, deposit holder and deadline

Closing date / conditions / contract exhibits to attach

Disclosures, marketing rights and local requirements to review

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Payoff request preparation

Gather the instructions for a secure payoff request. The lender or settlement agent should supply the authorization it requires.

Do not put Social Security numbers, account passwords, full account numbers or banking credentials on this worksheet. Share required identifiers directly through your closing team's secure process.

Property address and owner / authorized representative

Lender or lienholder / settlement agent

Loan reference supplied securely / payoff effective date

Information requested, recipients and permitted purpose

Authorization method, expiration and revocation instructions to confirm

Closing professional / next action / date
