

# COMMERCIAL CHECKLIST

CLIENT NAME: \_\_\_\_\_

PROPERTY ADDRESS: \_\_\_\_\_

**INSTRUCTIONS :** AGENTS ARE TO ENSURE ALL FORMS ARE THE LATEST C.A.R. REVISIONS. All non C.A.R Forms can be found on the Intranet Keller Williams Website or on the wall next to the West Hall printer. All files to be uploaded to Command within 3 days of taking a listing or getting your offer accepted.

## REQUIRED DOCUMENTS FOR ALL LEASE AND SALE TRANSACTIONS

- |   |   |
|---|---|
| 1 | AGENCY DISCLOSURE   |
| 2 | LISTING AGREEMENT   |
| 3 | COMMISSION AGREEMENT                                      |
| 4 | CO-BROKER AGREEMENT                                       |
| 5 | ADA/HAZMAT/TAX DISCLOSURE                                 |
| 6 | NATURAL HAZARD DISCLOSURE                                 |
| 7 | OTHER REPORTS   |
| 8 | OTHER DOCUMENTS REQUIRED BY LOCAL/STATE REGULATORY AGENCY |

## LEASE TRANSACTIONS

- |    |   |
|----|---|
| 9  | LEASE APPLICATION / LETTER OF INTENT (LOI)  |
| 10 | FULLY EXECUTED LEASE AGREEMENT  |
| 11 | LISTING / MARKETING FLYER PRINT OUT IN LOOPNET OR COSTAR                          |
| 12 | ALL OTHER OFFERS, COUNTER OFFERS, CORRESPONDANCE, AND OTHER PERTINENT INFORMATION |

## SALE TRANSACTIONS

- |    |   |
|----|---|
| 13 | ALL OFFERS, COUNTER OFFERS, LETTER OF INTENT (LOI)  |
| 14 | LISTING / OFFERING MEMORANDUM / MARKETING FLYER PRINT OUT IN LOOPNET OR COSTAR  |
| 15 | COPY OF BUYER'S FINANCIALS - LENDER STATEMENT OR VOF  |
| 16 | FULLY EXECUTED PURCHASE CONTRACT  |
| 17 | COPY OF ESCROW INSTRUCTIONS   |
| 18 | COPY OF ESCROW COMMISSION AUTHORIZATION   |
| 19 | (RU-PA) RESIDENTIAL UNITS PURCHASE ADDENDUM   |
| 20 | COPY OF BUYER/SELLER SIGNED ESTIMATED CLOSING STATEMENT   |
| 21 | COPY OF PRELIMINARY TITLE REPORTS   |
| 22 | (KW) PRELIMINARY TITLE REPORT ADVISORY  |
| 23 | EXECUTED FIRPTA OR EVIDENCE OF COMPLIANCE (SELLER)  |
| 24 | (CSPQ) COMMERCIAL SELLER PROPERTY QUESTIONNAIRE   |
| 25 | COMMERCIAL PROPERTY OWNER'S GUIDE TO EARTHQUAKE SAFETY  |
| 26 | FULLY EXECUTED DISCLOSURE OF INFORMATION ON LEAD BASED PAINT AND/OR LEASE BASED HAZARDS (MULTI-FAMILY PROPERTIES BUILT BEFORE 1978) |
| 27 | (KW) AFFILIATED BUSINESS ARRANGEMENT DISCLOSURE STATEMENT   |
| 28 | 1031 EXCHANGE - INTERMEDIARY PACKAGE  |
| 29 | CLIENT CORRESPONDANCE   |
| 30 | (CLCA) COMMERCIAL LEASE CONSTRUCTION ACCESSIBILITY ADDENDUM   |
| 31 | REFERRAL FORM (SIGNED BY BROKERS AND AGENTS)  |
| 32 | CLOSING STATEMENT   |
| 33 | MLS SOLD  |

Revised 9/28/2023