[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. Add or remove table rows to fit your needs. 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	[Address]
Client	[Name]

Checks

Check	Yes	No	N/A
Contracts exchanged - date confirmed	☐	☐	☐
Completion date agreed and diarised	☐	☐	☐
Funds / deposit arrangements confirmed	☐	☐	☐
Searches and enquiries satisfied	☐	☐	☐
Keys / access arrangements confirmed	☐	☐	☐
Meter readings arranged for completion day	☐	☐	☐
Removal / move-in logistics confirmed with client	☐	☐	☐
Final statement and invoice prepared	☐	☐	☐
File closed and archived	☐	☐	☐
Review / testimonial requested	☐	☐	☐

Actions required

[List any issues found and what was done]

Sign-off

Checked by	Signature	Date