

AI-Assisted Transaction Timeline and Deadline Tracking for Real Estate Agents

Keep every contingency deadline, document, and closing task on track from contract to close.

**24 copy-paste prompts 6 chapters residential real estate agents, transaction coordinators,
real estate teams managing multiple concurrent closings**

A FIELD GUIDE, NOT A BINDER

Use AI to build transaction timelines from your purchase agreement, track contingency deadlines, draft status update messages to clients and cooperating agents, and flag documents at risk of falling behind — while you keep sole authority over every date, contract interpretation, and legal step.

WELCOME

What this pack helps you build

Use AI to build transaction timelines from your purchase agreement, track contingency deadlines, draft status update messages to clients and cooperating agents, and flag documents at risk of falling behind — while you keep sole authority over every date, contract interpretation, and legal step.

THE HUMAN BOUNDARY

This is a tracking and drafting companion, not a real estate attorney, title officer, or a substitute for reading your actual contract. It does not have legal authority to interpret contract terms — a licensed agent (and attorney where required) must verify every deadline and contingency directly against the signed purchase agreement.

THE WORKFLOW

01 extract contract deadlines -> 02 build the transaction timeline -> 03 track contingencies -> 04 coordinate document collection -> 05 communicate status updates -> 06 manage the closing process

YOUR TOOLS

Choose the tool that fits the work

TOOL	SHINES AT	GOOD TO KNOW
ChatGPT	building timeline calculations and drafting status update messages to clients and cooperating agents	Give it the actual dates from your contract; always verify calculated deadlines against the signed document.
Claude	reading a full purchase agreement to extract every contingency and deadline in one pass	Paste the complete contract text, not a summary, so it doesn't miss a clause buried in an addendum.

Extracting Deadlines from the Contract

Every transaction timeline starts with the purchase agreement itself. This chapter uses AI to extract every date-bound obligation from the contract so nothing gets missed in the fine print.

IN THIS CHAPTER

- 01 Extract every deadline from the purchase agreement
- 02 Clarify calendar days vs. business days
- 03 Flag unusual or non-standard contract terms
- 04 Build the deadline verification summary

Extract every deadline from the purchase agreement

PURPOSE

Pull every contingency deadline and date-bound obligation out of a full contract, including ones buried in addenda.

WHEN TO USE IT

Use immediately after a purchase agreement is fully executed, before building any timeline.

COPY & PASTE PROMPT

Here is the full executed purchase agreement, including all addenda: [paste full contract text]. Extract every date-bound deadline mentioned, including: inspection period end date, appraisal deadline, loan commitment/financing contingency deadline, earnest money deposit due date, title commitment/review deadline, HOA document review period if applicable, and closing date. For each, note the exact contract language it's derived from and the calculation method if it's expressed as 'X days from acceptance' rather than a fixed date.

PRO TIPS

- Paste the complete document including every addendum — deadlines are frequently modified or added in addenda that a summary read would miss.
- Always verify a calculated date (e.g., '10 days from acceptance') by counting it yourself against the actual acceptance date and your state's rules on business vs. calendar days.

EXAMPLE OUTPUT

A list of extracted deadlines with source clause and calculation basis, e.g. 'Inspection deadline: 10 calendar days from acceptance (Section 6.2) — acceptance date 7/1, deadline 7/11.'

WHAT'S NEXT

Run the next prompt in this chapter.

Clarify calendar days vs. business days

PURPOSE

Correctly calculate deadlines that depend on whether the contract counts calendar days or business days, and how holidays factor in.

WHEN TO USE IT

Use whenever a contract deadline is expressed in days rather than a fixed date, especially near a weekend or holiday.

COPY & PASTE PROMPT

This contract deadline is described as [paste exact clause, e.g., '5 business days after mutual acceptance']. Our state's default rule for real estate contract day-counting is [describe your state's rule, or paste it from the contract if it specifies]. Mutual acceptance date was [date]. Calculate the exact deadline date, accounting for weekends and these upcoming holidays: [list any relevant holidays]. Show your day-by-day counting so I can verify it.

PRO TIPS

- Always have it show the day-by-day count rather than just the final answer — this is the step where off-by-one errors happen and are easiest to catch.
- Check your specific contract form's definition of 'day' — some standard forms define this explicitly and it can differ from your state's general default.

EXAMPLE OUTPUT

A day-by-day calculation ending in a specific deadline date, e.g. 'Day 1: Mon 7/1 (excluded, day of acceptance) ... Day 5: Mon 7/8 — deadline is 7/8.'

WHAT'S NEXT

Run the next prompt in this chapter.

Flag unusual or non-standard contract terms

PURPOSE

Catch deadlines or contingencies that deviate from your market's standard contract form, which are easy to miss if you're used to standard timelines.

WHEN TO USE IT

Use when a contract includes custom addenda or negotiated terms that modify the standard form.

COPY & PASTE PROMPT

Compare this executed contract's timeline terms [paste relevant sections] against a standard [your state/MLS] purchase agreement timeline, where inspection is typically [X] days, financing typically [Y] days, and closing typically [Z] days from acceptance. Flag anything in this specific contract that deviates from that standard — shortened contingency periods, unusual conditions precedent, or non-standard closing requirements.

PRO TIPS

- Shortened contingency periods are a common negotiation tactic in competitive offers — flag these clearly so your client isn't surprised by a compressed timeline.
- Route any flagged unusual legal term to an attorney if your state requires attorney review, rather than interpreting it yourself.

EXAMPLE OUTPUT

*A list of deviations from standard timeline terms, e.g.
'Inspection period shortened to 5 days (standard is 10) — flag to client as an unusually tight window.'*

WHAT'S NEXT

Run the next prompt in this chapter.

Build the deadline verification summary

PURPOSE

Create a final, agent-verified summary of all deadlines that will anchor the transaction timeline.

WHEN TO USE IT

Use once all deadlines are extracted and calculated, before building the full transaction timeline.

COPY & PASTE PROMPT

Here are all the deadlines I've extracted and calculated for this transaction [paste your list with dates and source clauses]. Organize them into a chronological summary table: deadline name, date, days remaining from today, source clause reference, and status (upcoming/at risk/passed). I will do a final manual check of each date against the signed contract before this becomes the working timeline.

PRO TIPS

- This chronological summary is the document you personally verify line by line against the signed contract — treat it as a draft until you've done that check.
- Recalculate 'days remaining' each time you pull up this summary since it's date-dependent and goes stale immediately.

EXAMPLE OUTPUT

A chronological deadline summary table ready for your final manual verification against the signed contract.

WHAT'S NEXT

Move on to "Building the Full Transaction Timeline".

Building the Full Transaction Timeline

With verified deadlines in hand, this chapter builds a complete working timeline that covers every task between contract acceptance and closing, not just the contractual deadlines.

IN THIS CHAPTER

- 05 Build the master transaction timeline
- 06 Identify timeline bottleneck risks
- 07 Draft a contingency removal amendment note
- 08 Rebuild the timeline after an amendment

Build the master transaction timeline

PURPOSE

Expand your verified contract deadlines into a complete task-level timeline covering every step to closing.

WHEN TO USE IT

Use once contract deadlines are verified, to build the working timeline for the whole transaction.

COPY & PASTE PROMPT

Using these verified contract deadlines [paste your verified deadline summary], build a complete transaction timeline including both contractual deadlines and standard supporting tasks: inspection scheduling, appraisal ordering, loan application/processing milestones, title order and review, HOA document request if applicable, final walkthrough, and closing/funding. For each task, estimate a target date working backward from the relevant deadline, and note who typically owns that task (buyer's agent, listing agent, lender, title company, client).

PRO TIPS

- Distinguish clearly between hard contractual deadlines (which cannot move without an amendment) and internal target dates (which are your own working buffers) so no one confuses the two.
- Build in buffer days before hard deadlines for tasks outside your direct control, like lender processing, since delays there are common.

EXAMPLE OUTPUT

A full task-level timeline with target dates, task owners, and clear labeling of hard deadlines vs. internal targets.

WHAT'S NEXT

Run the next prompt in this chapter.

Identify timeline bottleneck risks

PURPOSE

Spot which tasks in the timeline are most likely to cause a delay based on known risk factors for this specific transaction.

WHEN TO USE IT

Use right after building the initial timeline, to proactively flag risk areas rather than reacting to delays as they happen.

COPY & PASTE PROMPT

Here is our transaction timeline [paste it]. Given these known risk factors for this deal: [describe any known factors — e.g., 'buyer's lender is a smaller local bank with slower turnaround, appraiser backlog is 2 weeks in this area, seller is out of state and slow to respond to document requests']. Identify which timeline tasks are most at risk of delay and suggest a specific mitigation for each (e.g., order appraisal immediately, set an earlier internal check-in date).

PRO TIPS

- Give it real, specific risk context about this deal's parties — generic risk advice is less useful than advice tailored to your actual lender's known turnaround time.
- Set your own internal check-in dates earlier than the contractual deadline specifically for flagged high-risk tasks.

EXAMPLE OUTPUT

A risk-flagged list with specific mitigations, e.g. 'Appraisal: 2-week area backlog — order immediately, don't wait for inspection results.'

WHAT'S NEXT

Run the next prompt in this chapter.

Draft a contingency removal amendment note

PURPOSE

Prepare internal notes and a client explanation when a contingency is satisfied or removed ahead of an amendment being signed.

WHEN TO USE IT

Use when a contingency (inspection, appraisal, financing) is being satisfied or waived and needs to be formally documented.

COPY & PASTE PROMPT

The [inspection/appraisal/financing] contingency for [address] is being [satisfied/waived] as of [date]. Draft: (1) an internal file note documenting the contingency status change with the relevant facts, and (2) a plain-language explanation I can send my client confirming what this means for the transaction and what contractual protections they're giving up, if any, by removing this contingency. The actual amendment/waiver document itself must still be the official record, signed by all parties.

PRO TIPS

- Always be explicit with clients about what protection they lose when a contingency is waived — this is a common source of buyer confusion and later disputes.
- This drafted note supplements but never replaces the actual signed amendment or waiver form required by your contract.

EXAMPLE OUTPUT

An internal file note plus a plain-language client explanation of what waiving the contingency means, both clearly distinct from the official signed document.

WHAT'S NEXT

Run the next prompt in this chapter.

Rebuild the timeline after an amendment

PURPOSE

Update the working timeline accurately when the parties sign an amendment changing a deadline or closing date.

WHEN TO USE IT

Use whenever a signed amendment changes any date in the transaction.

COPY & PASTE PROMPT

An amendment has been signed changing [describe the change, e.g., 'closing date moved from 8/15 to 8/22 due to a financing contingency extension']. Here is our current timeline [paste it]. Update every downstream date that depends on the changed date, and flag any task that now falls too close to another deadline as a result of the shift.

PRO TIPS

- Any date change usually cascades — always regenerate the whole downstream timeline rather than manually editing just the one changed date, to catch ripple effects.
- Notify every relevant party (lender, title, cooperating agent) of the timeline update the same day the amendment is signed, not after you've finished internal paperwork.

EXAMPLE OUTPUT

An updated timeline with all downstream dates recalculated and any newly created scheduling conflicts flagged.

WHAT'S NEXT

Move on to "Tracking Contingencies and Risk".

Tracking Contingencies and Risk

Contingencies are where transactions most often fall apart. This chapter builds a systematic way to track contingency status and catch problems before they become deal-threatening.

IN THIS CHAPTER

- 09 Build the contingency tracking dashboard
- 10 Draft an inspection issue response plan
- 11 Track financing contingency risk signals
- 12 Draft an at-risk deadline escalation message

Build the contingency tracking dashboard

PURPOSE

Maintain a single view of every open contingency's status and deadline for a transaction, or across multiple active transactions.

WHEN TO USE IT

Use as a standing tool updated throughout the transaction, and reviewed at the start of each week.

COPY & PASTE PROMPT

Build a contingency tracking dashboard structure for [address or 'my active transactions' if tracking multiple]. Columns: contingency type, deadline, current status (pending/satisfied/waived/failed), days remaining, and next action required. Using this current status info [paste what you know], populate it and flag anything with fewer than 3 days remaining and no clear next action recorded.

PRO TIPS

- Review this dashboard at a fixed weekly time, not just when something feels urgent — the value is in catching things before they become urgent.
- A contingency flagged with days remaining but no next action is the highest-risk row on the dashboard — resolve those first.

EXAMPLE OUTPUT

A contingency dashboard with status and days-remaining columns, flagging any item under 3 days with no next action recorded.

WHAT'S NEXT

Run the next prompt in this chapter.

Draft an inspection issue response plan

PURPOSE

Organize a clear response plan when inspection findings require negotiation before the contingency deadline.

WHEN TO USE IT

Use immediately after receiving an inspection report with issues that may require a repair request or price negotiation.

COPY & PASTE PROMPT

The inspection report for [address] identified these issues: [paste key findings]. The inspection contingency deadline is [date], [X] days away. Help me organize a response plan: which issues are likely material enough to negotiate versus minor/cosmetic, a rough timeline for requesting a repair addendum and getting seller response before the deadline, and a fallback plan if negotiation isn't resolved in time (extend, waive, or terminate).

PRO TIPS

- Materiality judgment (what's worth negotiating) is a professional call for the agent and client to make together — use the draft as an organizing tool, not the final decision.
- Always have a clear fallback plan identified before the deadline arrives, so a stalled negotiation doesn't default into an accidental contingency waiver.

EXAMPLE OUTPUT

An organized response plan distinguishing likely-material from minor issues, with a negotiation timeline and a named fallback if the deadline arrives first.

WHAT'S NEXT

Run the next prompt in this chapter.

Track financing contingency risk signals

PURPOSE

Monitor for early warning signs that a buyer's financing may not close on time, so the timeline can be adjusted proactively.

WHEN TO USE IT

Use throughout the financing period, especially when the lender's communication suggests any delay or complication.

COPY & PASTE PROMPT

Here's what I know about the buyer's financing status: [describe — e.g., lender updates received, any conditions still outstanding, appraisal come in at value or not, buyer's communication about their loan process]. Assess whether this looks on track for the financing contingency deadline of [date] or whether there are warning signs of delay. If there are warning signs, suggest what questions to ask the lender and whether to start a conversation about a possible extension.

PRO TIPS

- A lender who stops giving specific updates and shifts to vague reassurances is itself often a warning sign worth probing directly.
- Start the extension conversation with the seller's side early if there's real risk — a last-minute extension request close to the deadline is a much harder ask.

EXAMPLE OUTPUT

A risk assessment with specific follow-up questions for the lender and a recommendation on whether to proactively raise an extension conversation.

WHAT'S NEXT

Run the next prompt in this chapter.

Draft an at-risk deadline escalation message

PURPOSE

Alert your client and relevant parties clearly and promptly when a deadline is genuinely at risk of being missed.

WHEN TO USE IT

Use as soon as you identify a deadline is genuinely at risk, not after it's already passed.

COPY & PASTE PROMPT

The [deadline name] deadline for [address] is at risk of being missed because [describe the reason]. Draft an escalation message to my client explaining the situation clearly, what the contractual consequence of missing it could be, and the options available (request extension, expedite the pending item, or accept the risk). Keep it direct and factual, not alarmist, but make sure the urgency is clear.

PRO TIPS

- Send this the moment you identify real risk, not after the deadline has already passed — timing is what allows any of the listed options to still be viable.
- State the actual contractual consequence plainly (e.g., loss of earnest money, contract termination rights) so the client can make an informed, timely decision.

EXAMPLE OUTPUT

A direct, factual escalation message stating the risk, the contractual consequence, and the client's available options with enough lead time to act.

WHAT'S NEXT

Move on to "Coordinating Document Collection".

Coordinating Document Collection

Transactions generate a steady stream of documents from multiple parties. This chapter uses AI to track what's needed, what's been received, and what's still missing.

IN THIS CHAPTER

- 13 Build the transaction document checklist
- 14 Track document collection status
- 15 Draft a document request follow-up
- 16 Prepare the closing document package summary

Build the transaction document checklist

PURPOSE

List every document required for this specific transaction type and jurisdiction so nothing is overlooked at closing.

WHEN TO USE IT

Use at the start of the transaction, based on the property type and any special conditions (HOA, well/septic, etc.).

COPY & PASTE PROMPT

Build a document checklist for this transaction: [describe property type, whether it's in an HOA, whether it has well/septic, whether it's a short sale/estate sale/new construction, and your state]. List every document typically required by closing, organized by source (buyer, seller, lender, title company, HOA, inspector), and note which are legally required in [your state] versus commonly included by convention.

PRO TIPS

- Note your state's specific required disclosures explicitly in the prompt — required forms vary significantly by state and this list must match your actual jurisdiction.
- Property type conditions (HOA, well/septic, new construction) each add their own required documents — describe the actual property accurately rather than using a generic checklist.

EXAMPLE OUTPUT

A document checklist organized by source with state-required items flagged separately from conventional ones, e.g. 'HOA resale certificate — required in [state] within X days of acceptance.'

WHAT'S NEXT

Run the next prompt in this chapter.

Track document collection status

PURPOSE

Maintain a running status of which required documents have been received, requested, or are still outstanding.

WHEN TO USE IT

Use as a standing tracker updated whenever a document is requested or received, reviewed regularly through the transaction.

COPY & PASTE PROMPT

Here is our document checklist [paste it] and current status of each item [describe what's received, requested but not yet received, or not yet requested]. Build a tracking table with columns: document, source, status, date requested, date received, and flag anything not yet requested that should be, given we're [X] days from closing.

PRO TIPS

- Flag anything not yet requested as closing approaches — a document that's simply been forgotten is different from one genuinely delayed, and this table should surface that distinction.
- Update this table the same day a document arrives, not in a weekly batch — stale status tracking defeats the purpose.

EXAMPLE OUTPUT

A document status tracking table with flagged items not yet requested, prioritized by proximity to closing.

WHAT'S NEXT

Run the next prompt in this chapter.

Draft a document request follow-up

PURPOSE

Send a professional reminder when a requested document is overdue from a cooperating party.

WHEN TO USE IT

Use when a requested document (from lender, title company, HOA, or the other side's agent) hasn't arrived by its expected date.

COPY & PASTE PROMPT

I requested [document name] from [party/role] on [date requested] and it hasn't arrived. Closing is [date]. Draft a professional follow-up message that references the original request, notes the closing timeline urgency without being aggressive, and asks for a specific expected delivery date.

PRO TIPS

- Ask for a specific expected date rather than a general 'when you can' — a concrete commitment is easier to follow up on again if missed.
- Escalate to a phone call, not just another email, if a document is genuinely holding up closing within the final week.

EXAMPLE OUTPUT

A professional, closing-timeline-aware follow-up message asking for a specific expected delivery date.

WHAT'S NEXT

Run the next prompt in this chapter.

Prepare the closing document package summary

PURPOSE

Confirm every required document is accounted for before closing and produce a summary for your file and the client.

WHEN TO USE IT

Use in the final days before closing, as a completeness check.

COPY & PASTE PROMPT

We're [X] days from closing on [address]. Here is our document checklist and current status [paste it]. Confirm which documents are fully complete and which still need action before closing, listed by urgency. Draft a brief summary I can share with my client confirming we're on track, or flagging specifically what's still outstanding and who's handling it.

PRO TIPS

- This final check should happen with enough lead time (at least 3-5 business days before closing) to actually resolve anything still outstanding.
- Be specific with the client about what's outstanding and who owns it — vague reassurance ('we're working on it') is less useful than a named owner and expected date.

EXAMPLE OUTPUT

A final pre-closing completeness check with an urgency-ranked outstanding list and a client-ready status summary.

WHAT'S NEXT

Move on to "Communicating Status Updates".

Communicating Status Updates

Clients and cooperating agents need regular, clear updates through a transaction. This chapter builds the recurring communication habits that keep everyone informed without constant one-off messages.

IN THIS CHAPTER

- 17 Draft a weekly client status update
- 18 Draft a cooperating agent coordination message
- 19 Draft a delay or problem notification
- 20 Build the multi-transaction weekly summary

Draft a weekly client status update

PURPOSE

Give clients a consistent, digestible summary of where the transaction stands each week.

WHEN TO USE IT

Use on a fixed weekly cadence throughout an active transaction, until closing.

COPY & PASTE PROMPT

Draft this week's status update email for my client on [address]. Current status: [paste what's completed, what's pending, upcoming deadlines in the next 7 days, and anything that needs the client's action]. Structure: brief overall status line, what happened this week, what's coming up, and any action needed from them with a clear deadline. Keep it under 150 words and reassuring but honest if anything is behind schedule.

PRO TIPS

- Sending this on a fixed day each week (not just when something happens) builds client trust even in weeks where little changed — say so explicitly if it's a quiet week.
- Put any client action item at the very top or in bold, since a buried action item is the most common reason clients miss a deadline.

EXAMPLE OUTPUT

A weekly status update under 150 words with a clear action item highlighted and honest status framing.

WHAT'S NEXT

Run the next prompt in this chapter.

Draft a cooperating agent coordination message

PURPOSE

Coordinate logistics with the agent on the other side of the transaction clearly and professionally.

WHEN TO USE IT

Use when scheduling, confirming, or resolving a logistical item that requires the cooperating agent's coordination.

COPY & PASTE PROMPT

I need to coordinate with the [buyer's/listing] agent on [address] about [describe the issue — e.g., scheduling the final walkthrough, confirming a repair completion, resolving a title issue]. Draft a professional message proposing [specific options/times if scheduling, or the specific ask if resolving an issue] and requesting confirmation by [date] given our closing timeline.

PRO TIPS

- Propose specific options (times, dates) rather than open-ended 'let me know what works' — specific proposals get faster responses.
- Always tie the request to the actual closing timeline so the other agent understands the urgency without you having to over-explain.

EXAMPLE OUTPUT

A professional coordination message with specific proposed options and a confirmation deadline tied to closing.

WHAT'S NEXT

Run the next prompt in this chapter.

Draft a delay or problem notification

PURPOSE

Communicate a transaction problem or delay to all relevant parties clearly and without unnecessary alarm.

WHEN TO USE IT

Use as soon as a genuine problem or delay is identified that affects multiple parties in the transaction.

COPY & PASTE PROMPT

A problem has come up on [address]: [describe the issue — e.g., title defect discovered, appraisal came in low, inspection revealed a major issue]. I need to notify [client / cooperating agent / lender, specify who]. Draft the notification message: state the issue factually, note what's being done about it, and what (if anything) is needed from the recipient. Keep tone calm and solution-oriented.

PRO TIPS

- Lead with the factual issue, not with reassurance — clients trust a straight statement of the problem followed by a plan more than vague comfort language upfront.
- Tailor the level of detail to the recipient — a lender needs different specifics than your client does for the same underlying issue.

EXAMPLE OUTPUT

A calm, factual problem notification tailored to the recipient, stating the issue, current action, and any needed response.

WHAT'S NEXT

Run the next prompt in this chapter.

Build the multi-transaction weekly summary

PURPOSE

Produce a single view across all your active transactions for your own planning or a team stand-up.

WHEN TO USE IT

Use weekly if you're managing multiple concurrent transactions, to prioritize your own time.

COPY & PASTE PROMPT

Here are my active transactions: [list each with address, current stage, closing date, and any known issues].
Build a weekly summary table ranked by urgency (nearest deadline or most at-risk first), with a one-line status and the single most important action needed on each this week.

PRO TIPS

- Rank by urgency, not alphabetically or by closing date alone
— a transaction closing in 30 days with an active problem can be more urgent than one closing in 5 days that's fully on track.
- Limit the 'most important action' to one item per transaction
— forcing that prioritization is what makes the summary useful for planning your week.

EXAMPLE OUTPUT

A ranked multi-transaction summary table with one status line and one priority action per deal.

WHAT'S NEXT

Move on to "Managing the Closing Process".

Managing the Closing Process

The final stretch to closing has its own checklist and communication needs. This chapter covers the walkthrough, closing disclosure review, and post-closing wrap-up.

IN THIS CHAPTER

- 21 Build the final walkthrough checklist
- 22 Explain the closing disclosure to a client
- 23 Draft the day-of-closing checklist
- 24 Draft the post-closing wrap-up

Build the final walkthrough checklist

PURPOSE

Prepare a specific final walkthrough checklist based on what was negotiated (repairs, included items) so nothing is missed at the last check.

WHEN TO USE IT

Use in the days before the scheduled final walkthrough.

COPY & PASTE PROMPT

Build a final walkthrough checklist for [address]. Include standard items (all systems functioning, property in same condition as under contract, no new damage) plus these transaction-specific items: [list negotiated repairs to verify complete, included items to confirm are still present, and any specific concerns from the inspection]. Format as a checklist my client can use during the actual walkthrough.

PRO TIPS

- Always include the specific negotiated repair items and included personal property from this deal — a generic walkthrough checklist misses the items most likely to actually be disputed.
- Photograph or note anything that fails the walkthrough immediately, since this is often the last practical leverage point before closing.

EXAMPLE OUTPUT

A walkthrough checklist combining standard items with this deal's specific negotiated repairs and included items.

WHAT'S NEXT

Run the next prompt in this chapter.

Explain the closing disclosure to a client

PURPOSE

Help a client understand their closing disclosure figures in plain language before they sign.

WHEN TO USE IT

Use once the closing disclosure is available, before the closing appointment, so the client isn't reviewing it cold.

COPY & PASTE PROMPT

My client received their closing disclosure with these figures: [paste the key line items — loan amount, cash to close, closing costs breakdown]. Draft a plain-language explanation of what each major line item means and what they should specifically compare against their most recent loan estimate to check for unexpected changes, per the standard 3-day review requirements.

PRO TIPS

- Direct clients to compare specifically against their last loan estimate, not just read the disclosure in isolation — the changes between the two documents are what actually matter.
- Any significant unexplained increase in closing costs should be raised with the lender immediately, not addressed at the closing table.

EXAMPLE OUTPUT

A plain-language walkthrough of the closing disclosure's key line items with specific guidance on what to compare against the loan estimate.

WHAT'S NEXT

Run the next prompt in this chapter.

Draft the day-of-closing checklist

PURPOSE

Make sure every practical detail for the closing appointment itself is handled.

WHEN TO USE IT

Use the day before closing, as a final logistics check.

COPY & PASTE PROMPT

Build a day-of-closing checklist for my client on [address]: what to bring (ID, cashier's check or wire confirmation details, any documents), what to expect during the appointment, and any last confirmations I should make (utilities transfer, final walkthrough completed, keys/garage remotes accounted for). Keep it as a simple, client-friendly checklist.

PRO TIPS

- Confirm wire instructions verbally by phone with a known number, never solely by email, given the prevalence of wire fraud targeting real estate closings.
- Remind clients that closing costs are typically paid via cashier's check or wire, not personal check, and confirm which their title company requires.

EXAMPLE OUTPUT

A client-friendly day-of-closing checklist covering documents, funds, and final confirmations, including a wire fraud verbal-verification reminder.

WHAT'S NEXT

Run the next prompt in this chapter.

Draft the post-closing wrap-up

PURPOSE

Close out the file properly and hand off next steps to the client after closing.

WHEN TO USE IT

Use immediately after closing, to wrap up the transaction file and support the client's transition.

COPY & PASTE PROMPT

Closing is complete for [address]. Draft: (1) a congratulations message to the client with next steps (utility transfers if not done, address change reminders, where to find their closing documents, homeowner's insurance confirmation), and (2) an internal file closeout checklist confirming all documents are archived, commission is processed, and any post-closing follow-up (review request, referral ask at an appropriate later date) is scheduled.

PRO TIPS

- Time any review or referral ask for a few weeks after closing, not the same day — right after closing clients are often overwhelmed with move logistics.
- Confirm the file closeout checklist is actually completed and archived before considering the transaction closed on your end, not just on the client-facing side.

EXAMPLE OUTPUT

A client congratulations/next-steps message plus an internal file closeout checklist, both ready to execute the same day as closing.

WHAT'S NEXT

This pack is complete once the closing file is archived and every worksheet is filled in.

Make the system yours

Contract Deadline Extraction Sheet

Every date-bound obligation pulled from the executed contract, with source clause and calculation basis.

DEADLINE NAME

DATE

SOURCE CLAUSE

CALCULATION BASIS (CALENDAR/BUSINESS DAYS)

VERIFIED AGAINST CONTRACT (Y/N)

Master Transaction Timeline

Full task-level timeline from acceptance to closing, distinguishing hard deadlines from internal targets.

TASK

TARGET DATE

HARD DEADLINE OR INTERNAL TARGET

OWNER

STATUS

Contingency Tracking Dashboard

Live status of every open contingency, reviewed weekly.

CONTINGENCY TYPE

DEADLINE

STATUS

DAYS REMAINING

NEXT ACTION REQUIRED

Document Collection Checklist

Every required document for this transaction, organized by source, with state-required items flagged.

DOCUMENT

SOURCE

REQUIRED BY STATE (Y/N)

DATE REQUESTED

DATE RECEIVED

Timeline Risk Log

Flagged bottleneck risks and their mitigation plans.

TASK AT RISK	
RISK FACTOR	
MITIGATION	
OWNER	
RESOLVED (Y/N)	

Weekly Client Status Log

Track that status updates are actually going out on a consistent cadence.

WEEK OF

STATUS SENT (Y/N)

ACTION ITEM FLAGGED

CLIENT RESPONSE RECEIVED (Y/N)

Final Walkthrough Checklist

Combines standard walkthrough items with this deal's specific negotiated repairs and included items.

NEGOTIATED REPAIR ITEM

VERIFIED COMPLETE (Y/N)

INCLUDED ITEM TO CONFIRM PRESENT

ISSUE FOUND (IF ANY)

Closing and Post-Closing Checklist

Day-of-closing logistics and post-closing file closeout in one sheet.

WIRE INSTRUCTIONS VERBALLY VERIFIED (Y/N)

DOCUMENTS BROUGHT CONFIRMED (Y/N)

FILE ARCHIVED (Y/N)

COMMISSION PROCESSED (Y/N)

FOLLOW-UP SCHEDULED (Y/N)

WHEN YOU REACH THE LAST PAGE

You have a working system

- [] A verified deadline extraction process that catches every contingency date in a contract, including addenda
- [] A complete task-level transaction timeline distinguishing hard deadlines from internal buffers
- [] A contingency tracking dashboard that flags at-risk items before they become deal-threatening
- [] A consistent weekly client communication habit with clear action items
- [] A day-of-closing and post-closing checklist that protects against wire fraud and closes the file cleanly

Keep the human accountable. Let the agent make the work repeatable.