



New Agent Transaction Review Checklist

Property Address: _____

Mentor Agent: _____ Mentee Agent: _____

The Mentor Agent is responsible for reviewing all of the documents involved in their Mentee Agent's first 5 listings and 5 pending sales. Below, the Mentor Agent should initial next to the document once it's been reviewed. If the document is exempt for that particular transaction, simply write "N/A."

Listing Paperwork

- ___ Consumer Notice for Seller
- ___ Listing Agreement
- ___ Seller's Disclosure (if applicable)
- ___ Lead Based Paint Disclosure (if applicable)
- ___ Estimated Closing Costs (an updated ECC is required anytime the price changes)
- ___ Change to Listing Contract 1
- ___ Change to Listing Contract 2
- ___ Change to Listing Contract 3
- ___ Change to Listing Contract 4
- ___ Other: _____
- ___ Other: _____

Pending Sale Paperwork

- ___ Consumer Notice for Buyer (if applicable)
- ___ Standard Agreement of Sale
- ___ Deposit Money Notice (buyers only, exempt if dual agent)
- ___ Fully Executed Seller's Disclosure (if applicable)
- ___ Fully Executed Lead Based Paint Disclosure (if applicable)
- ___ Buyer's Estimated Closing Costs (an updated ECC is required anytime the price changes)
- ___ Seller's Estimated Closing Costs (only for dual agency)
- ___ Buyer's Agency Contract (not required although highly recommended)
- ___ Rebate or Referral Documents (if applicable)
- ___ Buyer's Reply to Inspection
- ___ Change in Terms/Addendum to Agreement of Sale 1 (if applicable)
- ___ Change in Terms/Addendum to Agreement of Sale 2 (if applicable)
- ___ Change in Terms/Addendum to Agreement of Sale 3 (if applicable)
- ___ Change in Terms/Addendum to Agreement of Sale 4 (if applicable)
- ___ Transmittal (mentor agent only needs to review if you represent the seller)
- ___ Other: _____
- ___ Other: _____
- ___ Other: _____