Closing & handoff checklist

For the seller, agent, and closing adviser

Association / unit: _____ Target date: _____

- ☐ Have the closing adviser confirm title, correct unit description, applicable approval/waiver, and closing documents.
- ☐ Review the current estoppel, assessment allocation, other community balances, and closing statement.
- ☐ Resolve possession arrangements, including any tenant, deposit, lease, or seller stay after closing.
- ☐ Complete the final walkthrough and confirm promised fixtures, appliances, repairs, and personal-property removal.
- ☐ Arrange utility/service transitions and confirm when insurance responsibility changes with the advisers.
- ☐ Deliver unit keys, mailbox keys, remotes, manuals, warranties, and renovation records as applicable.
- ☐ Coordinate official ID, barcode, gate, parking, and account changes; confirm which credentials must be returned or replaced.
- ☐ Give the association reliable confirmation of the completed transfer and current buyer contact details.
- ☐ Reconcile final payments and stop the seller’s recurring payments only after the accounts are settled.
- ☐ Give the buyer reporting contacts and the New Owner Checklist; retain the seller’s closing and tax records securely.

Follow-up / person responsible: _____

Recommended planning aid, not a legal-compliance form. Confirm the actual contract, current law, association documents, and official procedures with your advisers.