



Escrow Check List

Business Name _____	Phone _____
Buyer's Name _____	Phone _____
Seller's Name _____	Phone _____
Escrow Co. _____	Phone _____
Escrow # _____	

Seller

Buyer

Prov.	Date		Prov.	Date.	
_____	_____	Signed Purchase Agreement	_____	_____	Signed Purchase Agreement
_____	_____	Final Counter Offer Sign-off	_____	_____	Final Counter Offer Sign-off
_____	_____	Amendments/Addendums	_____	_____	Amendments/Addendums
_____	_____	Copy of Deposit Check	_____	_____	Deposit Check
_____	_____	Seller Disclosure Signed	_____	_____	Buyer Disclosure Signed
_____	_____	Due Diligence List Prepared	_____	_____	Due Diligence Provided
_____	_____	Seller review- Buyers financial statement & proof of funds	_____	_____	Buyers to provide Financial Statement & proof of funds
_____	_____	Seller's info for escrow completed	_____	_____	Buyers info for escrow completed
_____	_____	Sellers attachments provided	_____	_____	Buyers attachments provided
_____	_____	Lease provided to Buyer	_____	_____	Copy of lease received
_____	_____	Lease application from landlord	_____	_____	Lease application provided



Escrow draft reviewed	Escrow draft reviewed
Escrow draft approved	Escrow draft approved
Sellers Contingencies	Contingency -due diligence removed
Review	Contingency-lease removed
Review	Contingency-financing removed
Review	Contingency-other removed
Review	Contingency –other removed
Escrow instructions signed	Escrow instructions signed
Buyers deposit funded	Buyers Deposit funded
Escrow starts –contingencies removed	Escrow starts –contingencies removed
Allocation of Purchase Price –agreed upon	Allocation of Purchase Price-agreed upon
Contact landlord- receive application	Receive application from landlord- provide requests
FFE list compiled & signed	FFE list received & signed
SBA or 3 rd party funding- pre approval (if applicable)	SBA or 3 rd party funding- pre approval (if applicable)
Provide SBA with business info	Provide SBA with package
Escrow –proposed close date	Escrow-proposed close date
City Business License	City Business License
Conditional Use Permit (CUP)	Conditional Use Permit (CUP)
Franchise UFOC-provided (if applicable)	Franchise application (if applicable)



Landlord approval	Landlord Approval-lease signed
Fictitious Name Sign off	Fictitious Name secured
Review	BOE- Sellers permit
Payroll information provided	EDD –open account
Utility Transfer-terminate	New Service-Utilities
SBA approval	SBA Approval
Contact Insurance carriers	Secure Insurance
Escrow-confirmed date COE	Escrow- confirmed date COE
Review searches/bulk sale	Secure necessary Licenses
Inventory (P.C.O.E.)	Inventory (P.C.O.E.)
Walk Through (P.C.O.E.)	Walk Through (P.C.O.E.)
Escrow pro-rations	Escrow – fund balance
Other Transfers	Other transfers
Final amendment –signed	Final Amendment- signed
Other	Other
Close Escrow	Close Escrow
Complete BOE – Final re- turn	
Funded	