

Homebuying Checklist

Private planning copy. Last reviewed: October 8, 2026.

Stage 1 - Getting prepared

- ☐ Identify housing priorities and preferred locations.
- ☐ Review personal financial information privately.
- ☐ Learn about mortgage pre-approval.
- ☐ Prepare questions for lenders and real estate professionals.

Optional stage date

Notes and questions

Stage 2 - Searching

- ☐ Identify must-have and nice-to-have features.
- ☐ Visit properties.
- ☐ Record property observations.
- ☐ Compare potential homes.

Optional stage date

Notes and questions

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Stage 3 - Under contract

- ☐ Track relevant contract dates with the appropriate professionals.
- ☐ Review disclosures and inspection information.
- ☐ Ask questions about contingencies.
- ☐ Coordinate with lender and escrow professionals.

Optional stage date

Notes and questions

Stage 4 - Closing

- ☐ Review closing documents with appropriate professionals.
- ☐ Confirm final walkthrough arrangements.
- ☐ Prepare for moving.
- ☐ Keep important transaction documents organized.

Optional stage date

Notes and questions