

PURCHASING CONSIDERATIONS

1. Make a moving checklist :
 - a. detail a plan for things that need to be done in the weeks before you move all the way up to moving day itself
2. Contact lawyer and complete Client Intake Form
3. Plan Packing:
 - a. order packing supplies or compile boxes
 - b. take unwanted items to charity or dump
 - c. clearly label boxes with the rooms in which they belong
 - d. arrange movers or van to move yourself
 - e. separate valuables and important files into a separate box that you will personally transport on closing day
4. Set-Up/Transfer Accounts:
 - a. contact your utility companies and notify them of your purchase and set up your new accounts (you can also make arrangements for pre-authorized payments)
 - b. contact your phone/cable/internet company to arrange for the installation of your services
 - c. assume any rented appliances (such as water heater or furnace)
 - d. arrange for home insurance
5. Inform Contacts:
 - a. notify your key contacts of your change of address (such as Service Ontario, Canada Revenue Agency, Work, Doctor, Pharmacy, etc.)
 - b. apply with Canada Post to have your mail forwarded
 - c. notify your children's school and arrange for their records to be transferred to their new school district
 - d. contact City for information regarding garbage pick-up, recycling facilities and local regulations
6. Prepare for Moving:
 - a. arrange to be off work, if desired
 - b. refill prescriptions
 - c. pack a suitcase with general supplies and clothes to last a few days while you sort through and unpack
 - d. reconfirm details with your movers, such as time they will arrive and payment arrangements
 - e. check all closets and drawers for missed items
 - f. general clean and sweep
7. Financing:
 - a. confirm your financing with your mortgage broker/lender

- b. arrange for bridge financing, if desirable
- c. advise your broker/lender of the lawyer who will be representing you for the purchase
- d. arrange to have funds available for balance of discussed 'down-payment', legal fees, Land Transfer Tax, and adjustments associated with the purchase (such as property taxes and common expenses)
- e. review Funds Summary from Lawyer

*If purchasing a condominium, ensure the Status Certificate is review by the lawyer prior to expiration of the condition

*If purchasing a newly built home from a builder, ensure the Agreement of Purchase and Sale is reviewed by the Lawyer prior to the expiration of the '10 day cooldown' period following the initial execution of the Agreement

SELLING CONSIDERATIONS

1. Make a moving checklist :
 - a. detail a plan for things that need to be done in the weeks before you move all the way up to moving day itself
2. Contact lawyer and complete Client Intake Form
3. Plan Packing:
 - a. order packing supplies or compile boxes
 - b. take unwanted items to charity or dump
 - c. clearly label boxes with the rooms in which they belong
 - d. arrange movers or van to move yourself
 - e. separate valuables and important files into a separate box that you will personally transport on closing day
4. Cancel/Transfer Accounts:
 - a. contact your utility companies and notify them of your sale and forwarding address for final bills (and set up accounts for your new home)
 - b. contact your phone/cable/internet company to arrange for the cancellation of your account or to transfer your account to your new home
 - c. transfer any rented appliances (such as water heater or furnace) to the new home owners
 - d. cancel your home insurance (and set up new insurance for your new residence)
5. Inform Contacts:
 - a. notify your key contacts of your change of address (such as Service Ontario, Canada Revenue Agency, Work, Doctor, Pharmacy, etc.)
 - b. apply with Canada Post to have your mail forwarded
 - c. notify your children's school and arrange for their records to be transferred to their new school district
6. Prepare for Moving:
 - a. arrange to be off work, if desired
 - b. refill prescriptions
 - c. pack a suitcase with general supplies and clothes to last a few days while you sort through and unpack
 - d. reconfirm details with your movers, such as time they will arrive and payment arrangements
 - e. check all closets and drawers for missed items
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