



Customer _____

Agent _____

New Home Purchase Date _____

Max Sale Date _____

TASK	OWNER	DATE	✓
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QUALIFYING THE LISTING AND CONFIRMING EQUITY

- | | | | | |
|---|-------------------------------------------------------------|-------|-------|--------------------------|
| 1 | Submit listing in HomePro app or send customer to Knock.com | Agent | _____ | <input type="checkbox"/> |
| 2 | Confirm property condition with Knock HomePro app | Agent | _____ | <input type="checkbox"/> |
- « Knock team will review submissions and respond within 24 hours. When approved, move to step 3. »

PRE-APPROVAL AND PREP PLANNING

- | | | | | |
|---|-----------------------------------------------------------------------------------------------|----------|-------|--------------------------|
| 3 | Customer to apply for mortgage with Knock Lending (apply.knock.com) | Customer | _____ | <input type="checkbox"/> |
| 4 | If completing home prep, retrieve estimates and share chosen estimate with Knock for approval | Customer | _____ | <input type="checkbox"/> |

NEW HOME PURCHASE

- | | | | | |
|----|----------------------------------------------------------------------|----------------|-------|--------------------------|
| 5 | Write purchase offer with no sales contingency and go under contract | Agent | _____ | <input type="checkbox"/> |
| 6 | Submit contract to Knock Lending and the title/closing company | Agent | _____ | <input type="checkbox"/> |
| 7 | Ask Knock Lending team to order appraisal | Agent/Customer | _____ | <input type="checkbox"/> |
| 8 | Sign Knock Backup Contract to ensure loan compliance | Agent/Customer | _____ | <input type="checkbox"/> |
| 9 | Complete home inspection and negotiate amendments | Agent/Customer | _____ | <input type="checkbox"/> |
| 10 | Close New Home Purchase Transaction and Move In! | Agent/Customer | _____ | <input type="checkbox"/> |

LISTING THE OLD HOUSE

- | | | | | |
|----|---------------------------------------------------------------------------------|----------------|-------|--------------------------|
| 11 | Complete listing prep ASAP (within 2 weeks is recommended) | Agent/Customer | _____ | <input type="checkbox"/> |
| 12 | List house on open market and negotiate offers | Agent | _____ | <input type="checkbox"/> |
| 13 | Close sale of old house and pay off Home Swap Equity Advance loan | Agent/Customer | _____ | <input type="checkbox"/> |
| 14 | Post a successful #KnockHomeSwap on social media and tag Knock so we can share! | Agent/Customer | _____ | <input type="checkbox"/> |

NOTES
