



Who	What	When	√
	Manager to create monthly spreadsheet for Agent. Create cheatsheet		
	Letter to be sent to entire group of staff of change Inform Agent and all contractors by phone		
	Cease Car Insurance when you transfer		
	The Tangible items are to be assigned and presumably delivered to the buyer.		
	Sending letters to owners Vendor & Purchaser must agree content & date letter's to be sent		
	Photocopier – to transfer or lease?		
	Agent to draft letter to go to the entire team as at unconditional date. Don't send until you have spoken to each personally following unconditional date.		
	Update all social media Ask agent to transition all information		
	Make contact all sub-contractors – see website, call them		
	Transfer hard files plus signage and any other material		
	Inform agent as a matter of courtesy		
	Letter to be sent to owners and tenants Send similar letter to contractor's		
	Update website – make list for updated contacts on both sites		
	Remove car signage		
	Bond signatory – Agent to sign, Manager to lodge / transfer		
	ADAI and URL transfers. Note contacts on list ready to action. Immediately after settlement		
	TRUST ACCOUNT – to transfer or close out?		
	The company name needs changing.		
	Move cars and other assets to new company, if applicable		
	Move various in and out of company / new company- need to sell everything left in asset schedule to the new company		
	Move car insurance to new company		
	Move mobiles if applicable		
	Move domains		
	Must draft and send letter to employees at the time the sale goes unconditional. And contractors- as they must recontract to buyer		
	Finalise pay's old team to settlement date		
	Ownership transfers for the vehicle. Print transfer forms and fill in part ready for after settlement has occurred / funds in.		

	Direct Debits – <ul style="list-style-type: none"> <li>• review list of</li> <li>• note to advise of change once unconditional</li> </ul> Cancel these direct debits at this time		
	LPMNZ Premium Membership – Cancel or transfer?		
	Transfer office rent over?		
	Trademe & realestate.co.nz accounts – update		
	Manager Facebook – change password and change settings to Private		
	Set up email redirections- all done		
	Office 365 - add Manager to the all staff group and the admin group? Removed Agent from email groups- review all office 365 groups.		
	E-mail Accounts – need transferring.		
	Mailchimp- review what needs to be done in this system		
	CONSOLE / or PM system, close out		
	Vendor to finalise EOFY & provide copy to purchaser		