Broker Checklist

Keep deals moving. Protect your reputation. Close with confidence.

CASE
& ASSOCIATES

Commercial deals move fast and stalls cost everyone. This checklist is built for brokers managing multiple active deals who need a reliable system to stay organized, communicate clearly, and keep momentum through every stage of the transaction.

Use it to track next steps, manage follow-up, and reduce the friction that slows deals down.

Broker Notes

Use this space to capture the essentials before your first meeting.

Property Address	
Deal Type	
Client Name	
Decision Maker	
Key Priorities	
Urgency/Timeline	
Immediate Concerns	
Additional Notes	

Pre-Deal Checklist

Get organized before the deal gets serious

Qualifying early saves weeks of effort. Use this section to confirm the deal is worth prioritizing and that you have what you need to evaluate fit and build a strong tenant recommendation.

Pre-Deal Qualification

- [ ] Confirm property type and intended use
- [ ] Define the transaction goal: lease, sale, investment, or owner-user
- [ ] Capture the client's timeline and target move-in or closing date
- [ ] Identify the decision maker and confirm their involvement in the process
- [ ] Note any urgency around occupancy, financing, or critical deadlines
- [ ] Identify all parties involved and confirm contact information
- [ ] Flag any early concerns — *location, pricing, constraints, or fit issues*

What to Have Ready Before You Pitch the Space

- [ ] Property address, type, and current use
- [ ] Available square footage or site dimensions
- [ ] Asking price or lease rate and terms
- [ ] Current occupancy status and availability timeline
- [ ] Floor plans and marketing materials
- [ ] Known constraints, special conditions, or tenant restrictions
- [ ] Primary contact at the property or ownership team

Broker Notes *Contact names, timeline details, deal structure, and any early red flags.*

CASE TIP: When evaluating properties to add to your tenant survey, prioritize owners who can answer questions quickly and provide clean materials. It reflects on you.

Due Diligence Checklist ONCE PROPERTY IS UNDER CONTRACT

Protect your client, and your commission, by staying ahead of the paperwork

Due diligence is where deals die quietly. Missing documents, unanswered questions, and slow responses from ownership can derail a closing at the worst possible moment. Use this section to stay ahead of every open item.

Due Diligence Essentials

- [ ] Request title commitment and legal description
- [ ] Confirm survey availability and order if needed
- [ ] Review zoning and confirm compatibility with client's intended use
- [ ] Gather all lease agreements, amendments, and associated documents
- [ ] Request current rent roll if property is income-producing
- [ ] Review income and expense statements
- [ ] Collect utility and operating cost history
- [ ] Request all service contracts and vendor agreements
- [ ] Confirm current tax bills and any special assessments
- [ ] Review insurance coverage and note any pending claims
- [ ] Verify permits, certificates of occupancy, and known code compliance issues
- [ ] Identify any open litigation, environmental concerns, or unresolved property matters

CASE TIP: **If something is missing or delayed, reach out directly. We'd rather solve it early than scramble at closing.**

Document Tracker *Keep these organized and accounted for throughout the process:*

DOCUMENT	STATUS	NOTES
LOI or Contract Summary		
Title Commitment & Survey		
Lease Files & Abstracts		
Rent Roll & Payment History		
Financial Statements & Expense Reports		
Maintenance & Service Agreements		
Insurance Documents		
Inspection Reports		
Permit & CO Documentation		

Deal Coordination Checklist

Keep the deal moving

Coordination breakdowns, not deal quality, are often what kill transactions. This section helps you stay on top of every moving part so your clients stay confident and your reputation stays intact.

Active Deal Coordination

- [ ] Send a clear, written update to all parties after every milestone
- [ ] Assign ownership to every open item — *no unanswered questions*
- [ ] Confirm all deadlines in writing and calendar them immediately
- [ ] Follow up on missing documents within 24 hours of the request
- [ ] Keep lender, attorney, inspector, and ownership communication aligned
- [ ] Surface issues early — *don't let a small problem become a deal-stopper*
- [ ] Maintain a single running list of open items and next steps
- [ ] Confirm no one is waiting on an unanswered question or outstanding approval

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Questions That Prevent Delays *Run through these at every key stage:*

- What is still missing and who is responsible for it?
- Who owns the next action, and what is the deadline?
- What needs to be resolved before the next milestone?
- Is anyone waiting on a document, approval, or decision?
- Is there anything that could affect closing timing right now?
- Has every party received the information they need to move forward?

Broker Notes *Pending actions, key conversations, and your next scheduled follow-up.*

CASE TIP: Need a quick answer? Give us a call. We're committed to fast, clear communication every step of the way.

How CASE Supports Brokers

A leasing partner who keeps up

At CASE, we understand that your reputation is built one deal at a time. We work to make every interaction with our properties easier, faster, and more professional, because when your clients are confident, deals close.

Bring in CASE When You Need:

- Fast, direct answers on property details, availability, and leasing terms
- Organized, ready-to-share materials — *floor plans, specs, and marketing assets*
- Responsive coordination that keeps momentum from stalling
- Reliable follow-through so nothing falls through the cracks between steps
- A dependable ownership team that shows up prepared and honors commitments

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Working With CASE Means:

- Competitive, clearly communicated commission structure
- One point of contact who knows the property and can answer quickly
- Professional marketing materials ready to share with prospective tenants
- Flexible touring availability to fit your client's schedule
- Transparent leasing terms with no surprises late in the process
- 40+ years of commercial real estate experience in the Tulsa market
- An ownership team that values broker relationships, and shows it

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Additional Notes

Ready to Add a CASE Property to Your Tour List?

Contact our leasing team directly

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