

Real Estate Data Room Checklist

A one-page preparation guide for property acquisitions, disposals and financing

Use this checklist before inviting buyers, lenders, advisers or other external reviewers.

01 Ownership & title

- ☐ Title deeds
- ☐ Land registry extracts
- ☐ Transfer records
- ☐ Ownership structure chart

02 Financials & performance

- ☐ Operating statements
- ☐ Budgets and forecasts
- ☐ Valuation reports
- ☐ Capex plans

03 Leases & rent roll

- ☐ Lease agreements and amendments
- ☐ Rent roll and arrears
- ☐ Tenant list
- ☐ Service charge records

04 Property & technical

- ☐ Building plans
- ☐ Inspection and maintenance reports
- ☐ Surveys
- ☐ Warranties

05 Legal & compliance

- ☐ Permits and planning approvals
- ☐ Insurance policies
- ☐ Litigation summary
- ☐ Compliance certificates

06 Environmental & zoning

- ☐ Environmental assessments
- ☐ Zoning and land-use documents
- ☐ Energy certificates
- ☐ Remediation records

Before launch: confirm title and lease schedules match, apply permission groups for each bidder or lender, and name who owns updates and the Q&A queue.

A prepared room gives buyers and lenders a clear structure while sellers keep control of what is shared, with whom and when.