

Transaction Coordinating for Sellers

TRANSACTION COORDINATION - \$300

Note: Agents are cc'd on all TC and client communication. TC services are from accepted contract to closing.
TC fee is paid out of commission after closing.

IMMEDIATE ACTIONS - WITHIN 1 BUSINESS DAY OF RECEIVING PURCHASE AGREEMENT

- Reviews PA for important Info: EM Amount, Inspection, Written Statement, Close Date - Add Dates to any items
- Change MLS Status with contingency (or pending if applicable)
- Send any missing signatures out for signatures
- Verify Trust Funds has been requested
- Email Buyers Agent - TC Intro, Ask Title Co, EM Instructions
- Fill out Closing Summary Worksheet
- Send Agent List Of Important Dates - Inspection Deadlines, Written Statement Date, Close Date
- Send PA and CS Worksheet to Title/Closer
- Send Seller Intro Email: Copy of PA, Next Steps (Inspection)
- Upload Documents to Skyslope
- Email Listing Coordinator accepted PA

FIRST WEEK FOLLOW UP TASKS

- Verify Earnest Money has been Submitted
- Send Lender Copy of Settled Earnest Money
- Verify Inspection has been scheduled
- Verify HOA Documents have been ordered (If Applicable)
- Remind Agent of Inspection Deadline (48 Hours prior)
- Send All Parties inspection amendment for signatures (if applicable)
- Follow Up/Clear Any Contingencies
- Change Status to Pending (When Applicable)
- Make Any Corrections Needed to Skyslope Checklist
- Weekly Update to Agent
- Update all parties with any updated information
- Create Pending Social Media Post

Transaction Coordinating for Sellers

ONGOING FOLLOW UP TASKS

- Follow Up/Remove any remaining Contingencies
- Verify EM has Cleared, Upload to Skyslope and Copy to Lender
- Email Lender to check in on Appraisal Date and Due Date
- Send Seller Next Step Email - Appraisal
- Follow up on any inspection items
- Check in with Title (Week 2)
- Update Agent on Appraisal (work orders)
- Check in with Title (Week 3)
- Follow up on any appraisal work orders
- Send Title Commitment to Agent for Review
- Send Email to Lender reminder Written Statement (If Applicable)

ONE WEEK PRE-CLOSING

- Send email to Lender Checking in on Clear to Close
- Request Final Alta from Title
- Review and Send Alta to Agent for Review
- Send Next Step Email to Seller (Closing Info, Keys, and Final Walkthrough procedure)
- Verify Skyslope Checklist is Complete and Accurate
- Weekly Update to Agent (if no other communication that week)

POST CLOSE

- Upload Commission Check, Alta and Deed to Skyslope
- Update Status to SOLD on MLS
- Send out Review to Client through RateMyAgent
- Create Just Sold Social Graphic
- Send agent reminder to remove ride and LB
- Send Listing Coordinator Confirmation of SOLD and Sign Removal Request or order sign down

Transaction Coordinating for Buyers

TRANSACTION COORDINATION - \$300

Note: Agents are cc'd on all TC and client communication. TC services are from accepted contract to closing. TC fee is paid out of commission after closing.

IMMEDIATE ACTIONS - WITHIN 1 BUSINESS DAY OF RECEIVING PURCHASE AGREEMENT

- Reviews PA for important Info: EM Amount, Inspection, Written Statement, Close Date - Add Dates to any items
- Send any missing signatures out for signatures
- Send agent reminder to initiate Trust Funds
- Email Listing Agent - TC Intro, Ask Title Co, EM Instructions
- Send Buyer Intro Email: Copy of PA, EM Instructions & Inspection Instructions
- Fill out Closing Summary Worksheet
- Send Agent List Of Important Dates - Inspection Deadlines, Written Statement Date, Close Date, HOA Docs
- Send PA and CS Worksheet to Lender
- Send PA and CS Worksheet to Title/Closer
- Upload Documents to Skyslope
- Let Client know about LiveEasy and to look for the email invite

FIRST WEEK FOLLOW UP TASKS

- Verify Earnest Money has been Submitted
- Verify Inspection has been scheduled
- Verify HOA Documents have been received (If Applicable)
- Remind Agent of Inspection Deadline (48 Hours prior)
- Send All Parties inspection amendment for signatures (if applicable)
- Follow Up/Clear Any Contingencies
- Make Any Corrections Needed to Skyslope Checklist
- Weekly Update to Agent
- Update all parties with any updated information

Transaction Coordinating for Buyers

ONGOING FOLLOW UP TASKS

- Send Lender Copy of Settled Earnest Money
- Follow Up/Remove any remaining Contingencies
- Email Lender when Contingencies are Removed and OK to order Appraisal
- Verify EM has Cleared, Upload to Skyslope and Copy to Lender
- Email Lender to Check In on Appraisal Date and Due Date
- Send Buyer Next Step Email - Appraisal
- Follow up on any inspection items
- Check in with Title (Week 2)
- Email Lender to Check In on Appraisal Received 24 hours after due date
- Update Agent on Appraisal (work orders)
- Check in with Title (Week 3)
- Follow up on any appraisal work orders
- Send Title Commitment to Agent for Review
- Send Email to Lender reminder Written Statement 48 hours before deadline(If Applicable)
- Send Listing Agent the Written Statement (If Applicable)
- Weekly Update to Agent (if no other communication that week)
- Update all parties if any information has changed
- Order Warranty (If Applicable) make sure copy is sent to Agent & Title

ONE WEEK PRE-CLOSING

- Send email to Lender Checking in on Clear to Close
- Request Final Alta from Title
- Review and Send Alta to Agent for Review
- Send Next Step Email to Buyer for Closing Info and Final Walkthrough procedure
- Verify Skyslope Checklist is Complete and Accurate
- Weekly Update to Agent (if no other communication that week)
- Send Client the Utility Information

POST CLOSE

- Upload Commission Check, Alta and Deed to Skyslope
- Email Agent - Congrats, Thanks and reminder to ask for Review