

TRANSACTION COORDINATOR TASK LIST

DOCUMENT CHECKLIST

- | | | | | | |
|-------------------------------|------------------------------|--|--------------------------------------|------------------------------|--|
| <input type="checkbox"/> AOS | <input type="checkbox"/> EMD | <input type="checkbox"/> SPD | <input type="checkbox"/> PREQUAL/POF | <input type="checkbox"/> SEC | <input type="checkbox"/> BEC |
| <input type="checkbox"/> BAC | <input type="checkbox"/> CN | <input type="checkbox"/> KW DISCLOSURE | <input type="checkbox"/> DMN | <input type="checkbox"/> CBC | <input type="checkbox"/> RLBPHD |
| <input type="checkbox"/> DEED | | <input type="checkbox"/> REFERRAL FORM | <input type="checkbox"/> W-9 | | <input type="checkbox"/> KPSS ABA FORM |

DUAL AGENCY: B S

WIRE NOTICE: B S

HOME WARRANTY: B S

KW ADDENDUM: B S A

COMMAND	FILE PREPARATION	INTRODUCTION
<input type="checkbox"/> File Started	<input type="checkbox"/> Added to Pending Checklist	<input type="checkbox"/> Sent to Client
<input type="checkbox"/> File Submitted	<input type="checkbox"/> Added to Calendar	<input type="checkbox"/> Sent to Agent
<input type="checkbox"/> File Approved	<input type="checkbox"/> Tasks Set Up	<input type="checkbox"/> Sent to Attorney
<input type="checkbox"/> Commission Submitted	<input type="checkbox"/> Pended MLS	<input type="checkbox"/> Sent to Lender
	<input type="checkbox"/> Added to ShowingTime	

FINANCIALS & TITLE

DEPOSIT:

- Follow Up Sent to Buyer First Deposit Rcvd
- Second Deposit Received

MORTGAGE APPLICATION & APPRAISAL ORDER:

- Follow Up with Buyer's Agent

MORTGAGE COMMITMENT:

Due Date: _____ Requested: _____
 Received: _____ Sent to Seller

TITLE WORK:

- Title Work Ordered Seller's Info Sent to Title Co
 TC Invoice Sent to Title Company

RESALE CERTIFICATE & C/O

RESALE CERTIFICATE:

Order Resale Certificate By: _____

Requested Payment from Seller: _____

Seller Paid: _____

Resale Cert Received:

- To Buyer To Seller To Title Co.

Receipt of Documents:

Sent to Buyer: _____ Fully Signed

RESALE ADDITIONAL INFORMATION:

Name: _____ Phone: _____

Email: _____ Exp: _____

Cost: _____

CERTIFICATE OF OCCUPANCY:

- Request Payment Seller Paid
 Inspection Set: _____ C/O Received
 Sent Copy to Buyer

C/O ADDITIONAL INFORMATION:

Township: _____ Phone: _____

Email: _____ Cost: _____

CLOSING PREP

UTILITY INFO:

- Requested from Seller Received

Sent to Buyer: _____

CLOSING ATTENDANCE:

Client Attending: _____ (If No)

- Yes No Docs Sent to Client: _____
 Docs Signed Early @ Title: _____

ESCROW CHECK:

Request Escrow Check: _____ Confirm Receipt

- Conventional Check Electronic Check

INSPECTIONS & CONDITION

HOME INSPECTION SCHEDULED:

- House/Septic Ready Gate Pass

Inspection Reports:

- Received Sent to Client

BRTI:

- Prepared/Received Sent to Seller

CIT ADDENDUM:

- Prepared Sent Signed

BRTI REPAIRS:

- Follow Up with Seller Request Receipts
 Repairs Finished Receipts Received

APPRAISAL, WARRANTY & ROFR

RIGHT OF FIRST REFUSAL:

- Requested Received

APPRAISAL:

- Ordered Scheduled: _____
 Value OK? Yes No Appraisal Repairs? Yes No

(If Yes to Repairs):

Repairs Completed: _____ Notify Lender: _____

HOME WARRANTY:

- Ordered Sent Invoice to Title

SETTLEMENT & CLOSEOUT

SETTLEMENT:

- Send Request to Title Company Clear to Close
 Reserve Conference Room Schedule Walkthrough

Preferred Time: _____ Preferred Location: _____

SEND SETTLEMENT NOTICE:

- List Agent Seller Buyer Buyer's Agent Attorney

DOCS & REPORTS:

Pre-Settlement Walkthrough Report & Settlement Info Sheet:

- Prepared Sent to Agent

Preliminary HUD:

- Requested Reviewed Shared

COMMAND UPDATE:

- Signed HUD Signed Commission Check
 Signed PSW Report Signed Settlement Info Sheet
 Upload Closing Documents to Command & Submit
 Submit Commission in Command

CLOSE OUT LISTING IN MLS:

- PMAR GLVR

NOTES