

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"/> BAC	<input type="checkbox"/> CN	<input type="checkbox"/> KW DISCLOSURE	<input type="checkbox"/> DMN
<input type="checkbox"/> DEED		<input type="checkbox"/> REFERRAL FORM	<input type="checkbox"/> W-9
DUAL AGENCY: <input type="checkbox"/> B <input type="checkbox"/> S		WIRE NOTICE: <input type="checkbox"/> B <input type="checkbox"/> S	HOME WARRANTY: <input type="checkbox"/> B <input type="checkbox"/> S
			KW ADDENDUM: <input type="checkbox"/> B <input type="checkbox"/> S <input type="checkbox"/> A
COMMAND		FILE PREPARATION	
<input type="checkbox"/> File Started		<input type="checkbox"/> Added to Pending Checklist	
<input type="checkbox"/> File Submitted		<input type="checkbox"/> Added to Calendar	
<input type="checkbox"/> File Approved		<input type="checkbox"/> Tasks Set Up	
<input type="checkbox"/> Commission Submitted		<input type="checkbox"/> Pended MLS	
		<input type="checkbox"/> Added to ShowingTime	
FINANCIALS & TITLE		INTRODUCTION	
DEPOSIT:		<input type="checkbox"/> Sent to Client	
<input type="checkbox"/> Follow Up Sent to Buyer		<input type="checkbox"/> Sent to Agent	
<input type="checkbox"/> First Deposit Rcvd		<input type="checkbox"/> Sent to Attorney	
<input type="checkbox"/> Second Deposit Received		<input type="checkbox"/> Sent to Lender	
MORTGAGE APPLICATION & APPRAISAL ORDER:			
<input type="checkbox"/> Follow Up with Buyer's Agent			
MORTGAGE COMMITMENT:			
Due Date: _____ Requested: _____			
Received: _____ <input type="checkbox"/> Sent to Seller			
TITLE WORK:			
<input type="checkbox"/> Title Work Ordered			
<input type="checkbox"/> Seller's Info Sent to Title Co			
<input type="checkbox"/> TC Invoice Sent to Title Company			
RESALE CERTIFICATE & C/O		INSPECTIONS & CONDITION	
RESALE CERTIFICATE:		HOME INSPECTION SCHEDULED:	
Order Resale Certificate By: _____		<input type="checkbox"/> House/Septic Ready	
Requested Payment from Seller: _____		<input type="checkbox"/> Gate Pass	
Seller Paid: _____		Inspection Reports:	
Resale Cert Received:		<input type="checkbox"/> Received	
<input type="checkbox"/> To Buyer		<input type="checkbox"/> Sent to Client	
<input type="checkbox"/> To Seller			
<input type="checkbox"/> To Title Co.		BRTI:	
Receipt of Documents:		<input type="checkbox"/> Prepared/Received	
Sent to Buyer: _____ <input type="checkbox"/> Fully Signed		<input type="checkbox"/> Sent to Seller	
RESALE ADDITIONAL INFORMATION:		CIT ADDENDUM:	
Name: _____ Phone: _____		<input type="checkbox"/> Prepared	
Email: _____ Exp: _____		<input type="checkbox"/> Sent	
Cost: _____		<input type="checkbox"/> Signed	
CERTIFICATE OF OCCUPANCY:		BRTI REPAIRS:	
<input type="checkbox"/> Request Payment		<input type="checkbox"/> Follow Up with Seller	
<input type="checkbox"/> Seller Paid		<input type="checkbox"/> Request Receipts	
<input type="checkbox"/> Inspection Set: _____		<input type="checkbox"/> Repairs Finished	
<input type="checkbox"/> C/O Received		<input type="checkbox"/> Receipts Received	
<input type="checkbox"/> Sent Copy to Buyer			
C/O ADDITIONAL INFORMATION:			
Township: _____ Phone: _____			
Email: _____ Cost: _____			
CLOSING PREP		APPRAISAL, WARRANTY & ROFR	
UTILITY INFO:		RIGHT OF FIRST REFUSAL:	
<input type="checkbox"/> Requested from Seller		<input type="checkbox"/> Requested	
<input type="checkbox"/> Received		<input type="checkbox"/> Received	
Sent to Buyer: _____			
CLOSING ATTENDANCE:		APPRAISAL:	
Client Attending: _____ (If No)		<input type="checkbox"/> Ordered	
<input type="checkbox"/> Yes <input type="checkbox"/> No		Scheduled: _____	
<input type="checkbox"/> Docs Sent to Client: _____		Value OK? <input type="checkbox"/> Yes <input type="checkbox"/> No	
<input type="checkbox"/> Docs Signed Early @ Title: _____		Appraisal Repairs? <input type="checkbox"/> Yes <input type="checkbox"/> No	
		(If Yes to Repairs):	
		Repairs Completed: _____ Notify Lender: _____	
ESCROW CHECK:		HOME WARRANTY:	
Request Escrow Check: _____		<input type="checkbox"/> Ordered	
<input type="checkbox"/> Confirm Receipt		<input type="checkbox"/> Sent Invoice to Title	
<input type="checkbox"/> Conventional Check			
<input type="checkbox"/> Electronic Check			
NOTES			