

PROPERTY ADDRESS:	MLS #:
123 Main St, Philadelphia, PA 12345	404676

QUICK REFERENCE				
CONTRACT DATE:	ACCEPTANCE:	SALE PRICE:	SELLER'S ASSIST:	EMD DEPOSIT:
		\$350000.00	\$5000.00	

CONTINGENCY DATES				CLOSING INFORMATION	
EXECUTION DATE:	DEPOSIT DUE:	LOAN APP DUE:	ORDER TITLE WORK BY:	DATE:	6/18/2025
				TIME:	
MTG COMMIT DUE:	BRTI DUE:	SELLER RESP DUE:	APPRAISAL DATE:	LOCATION:	
				SELLER ATTENDING:	<input type="checkbox"/> YES <input type="checkbox"/> NO

AGENT INFORMATION		
AGENT:	ROLE:	OPP. AGENT:
Agent Name	DUAL AGENT	

BUYER INFORMATION	SELLER INFORMATION
NAME:	NAME:
Buyer Name	Seller Name
PHONE:	PHONE:
(222) 222-2222	(222) 333-2243
ADDRESS:	ADDRESS:
123 Main St, Philadelphia, PA 12345	123 Main St, Philadelphia, PA 12345
EMAIL:	EMAIL:
buyer@email.com	seller@email.com

LEGAL INFORMATION		
ATTORNEY:	CONTACT:	EMAIL:
Attorney Name		

FINANCIAL DETAILS		LENDER INFORMATION
COMMISSION DETAILS		COMPANY:
LIST SIDE %:	BUYER SIDE %:	
3.00	3.00	
TOTAL %:	\$ AMOUNT:	PHONE:
6.00		
SELLER PAID:	BUYER PAID:	EMAIL:

SERVICE PROVIDERS	
INSPECTION	TITLE
INSPECTOR:	COMPANY:
	Title Company
CONTINGENCY:	PHONE:
INSPECTION:	EMAIL:

REFERRAL INFORMATION	UTILITIES
DUE TO:	WATER: <input type="checkbox"/> PRIVATE <input type="checkbox"/> PUBLIC   SEWER: <input type="checkbox"/> PRIVATE <input type="checkbox"/> PUBLIC
Referral Party	
%:	
20.00	

# 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	INSPECTIONS & CONDITION
<b>DEPOSIT:</b> <input type="checkbox"/> Follow Up Sent to Buyer <input type="checkbox"/> First Deposit Rcvd <input type="checkbox"/> Second Deposit Received	<b>HOME INSPECTION SCHEDULED:</b> <input type="checkbox"/> House/Septic Ready <input type="checkbox"/> Gate Pass Inspection Reports: <input type="checkbox"/> Received <input type="checkbox"/> Sent to Client
<b>MORTGAGE APPLICATION &amp; APPRAISAL ORDER:</b> <input type="checkbox"/> Follow Up with Buyer's Agent	<b>BRTI:</b> <input type="checkbox"/> Prepared/Received <input type="checkbox"/> Sent to Seller
<b>MORTGAGE COMMITMENT:</b> Due Date: _____ Requested: _____ Received: _____ <input type="checkbox"/> Sent to Seller	<b>CIT ADDENDUM:</b> <input type="checkbox"/> Prepared <input type="checkbox"/> Sent <input type="checkbox"/> Signed
<b>TITLE WORK:</b> <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	<b>BRTI REPAIRS:</b> <input type="checkbox"/> Follow Up with Seller <input type="checkbox"/> Request Receipts <input type="checkbox"/> Repairs Finished <input type="checkbox"/> Receipts Received

RESALE CERTIFICATE & C/O	APPRAISAL, WARRANTY & ROFR
<b>RESALE CERTIFICATE:</b> Order Resale Certificate By: _____ Requested Payment from Seller: _____ Seller Paid: _____ Resale Cert Received: <input type="checkbox"/> To Buyer <input type="checkbox"/> To Seller <input type="checkbox"/> To Title Co. Receipt of Documents: Sent to Buyer: _____ <input type="checkbox"/> Fully Signed	<b>RIGHT OF FIRST REFUSAL:</b> <input type="checkbox"/> Requested <input type="checkbox"/> Received
<b>RESALE ADDITIONAL INFORMATION:</b> Name: _____ Phone: _____ Email: _____ Exp: _____ Cost: _____	<b>APPRAISAL:</b> <input type="checkbox"/> Ordered      Scheduled: _____ Value OK? <input type="checkbox"/> Yes <input type="checkbox"/> No      Appraisal Repairs? <input type="checkbox"/> Yes <input type="checkbox"/> No (If Yes to Repairs): Repairs Completed: _____ Notify Lender: _____
<b>CERTIFICATE OF OCCUPANCY:</b> <input type="checkbox"/> Request Payment <input type="checkbox"/> Seller Paid <input type="checkbox"/> Inspection Set: _____ <input type="checkbox"/> C/O Received <input type="checkbox"/> Sent Copy to Buyer	<b>HOME WARRANTY:</b> <input type="checkbox"/> Ordered <input type="checkbox"/> Sent Invoice to Title

CLOSING PREP	SETTLEMENT & CLOSEOUT
<b>UTILITY INFO:</b> <input type="checkbox"/> Requested from Seller <input type="checkbox"/> Received Sent to Buyer: _____	<b>SETTLEMENT:</b> <input type="checkbox"/> Send Request to Title Company <input type="checkbox"/> Clear to Close <input type="checkbox"/> Reserve Conference Room <input type="checkbox"/> Schedule Walkthrough Preferred Time: _____ Preferred Location: _____
<b>CLOSING ATTENDANCE:</b> Client Attending: _____ (If No) <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Docs Sent to Client: _____ <input type="checkbox"/> Docs Signed Early @ Title: _____	<b>SEND SETTLEMENT NOTICE:</b> <input type="checkbox"/> List Agent <input type="checkbox"/> Seller <input type="checkbox"/> Buyer <input type="checkbox"/> Buyer's Agent <input type="checkbox"/> Attorney
<b>ESCROW CHECK:</b> Request Escrow Check: _____ <input type="checkbox"/> Confirm Receipt <input type="checkbox"/> Conventional Check <input type="checkbox"/> Electronic Check	<b>DOCS &amp; REPORTS:</b> Pre-Settlement Walkthrough Report & Settlement Info Sheet: <input type="checkbox"/> Prepared <input type="checkbox"/> Sent to Agent Preliminary HUD: <input type="checkbox"/> Requested <input type="checkbox"/> Reviewed <input type="checkbox"/> Shared

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<b>ESCROW CHECK:</b> Request Escrow Check: _____ <input type="checkbox"/> Confirm Receipt <input type="checkbox"/> Conventional Check <input type="checkbox"/> Electronic Check	<b>DOCS &amp; REPORTS:</b> Pre-Settlement Walkthrough Report & Settlement Info Sheet: <input type="checkbox"/> Prepared <input type="checkbox"/> Sent to Agent Preliminary HUD: <input type="checkbox"/> Requested <input type="checkbox"/> Reviewed <input type="checkbox"/> Shared

## NOTES

_____ _____ _____ _____
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