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

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

| | | |
|-------------------|----------|--------|
| LEGAL INFORMATION | | |
| ATTORNEY: | CONTACT: | EMAIL: |
| Attorney Name | | |

| | | |
|--------------------|--------------|--------------------|
| FINANCIAL DETAILS | | LENDER INFORMATION |
| COMMISSION DETAILS | | |
| LIST SIDE %: | SELLER PAID: | COMPANY: |
| 3.00 | \$10000.00 | |
| BUYER SIDE %: | BUYER PAID: | PHONE: |
| 3.00 | \$2500.00 | |
| TOTAL %: | \$ AMOUNT: | EMAIL: |
| 6.00 | | |

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

| FINANCIALS & TITLE | INSPECTIONS & CONDITION |
|--|---|
| DEPOSIT: <input type="checkbox"/> Follow Up Sent to Buyer <input type="checkbox"/> First Deposit Rcvd <input type="checkbox"/> Second Deposit Received | HOME INSPECTION SCHEDULED: <input type="checkbox"/> House/Septic Ready <input type="checkbox"/> Gate Pass Inspection Reports: <input type="checkbox"/> Received <input type="checkbox"/> Sent to Client |
| MORTGAGE APPLICATION & APPRAISAL ORDER: <input type="checkbox"/> Follow Up with Buyer's Agent | BRTI: <input type="checkbox"/> Prepared/Received <input type="checkbox"/> Sent to Seller |
| MORTGAGE COMMITMENT: Due Date: _____ Requested: _____ Received: _____ <input type="checkbox"/> Sent to Seller | CIT ADDENDUM: <input type="checkbox"/> Prepared <input type="checkbox"/> Sent <input type="checkbox"/> Signed |
| 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 | BRTI REPAIRS: <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 |
|--|---|
| RESALE CERTIFICATE: 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 | RIGHT OF FIRST REFUSAL: <input type="checkbox"/> Requested <input type="checkbox"/> Received |
| RESALE ADDITIONAL INFORMATION: Name: _____ Email: _____ Phone: _____ Cost: _____ Exp: _____ | APPRAISAL: <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: _____ |
| C/O ADDITIONAL INFORMATION: Township: _____ Phone: _____ Email: _____ Cost: _____ | HOME WARRANTY: <input type="checkbox"/> Ordered <input type="checkbox"/> Sent Invoice to Title |

| CLOSING PREP | SETTLEMENT & CLOSEOUT |
|--|--|
| UTILITY INFO: <input type="checkbox"/> Requested from Seller <input type="checkbox"/> Received Sent to Buyer: _____ | SETTLEMENT: <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: _____ |
| CLOSING ATTENDANCE: 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: _____ | SEND SETTLEMENT NOTICE: <input type="checkbox"/> List Agent <input type="checkbox"/> Seller <input type="checkbox"/> Buyer <input type="checkbox"/> Buyer's Agent <input type="checkbox"/> Attorney |
| ESCROW CHECK: Request Escrow Check: _____ <input type="checkbox"/> Confirm Receipt <input type="checkbox"/> Conventional Check <input type="checkbox"/> Electronic Check | DOCS & REPORTS: 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 |
| | COMMAND UPDATE: <input type="checkbox"/> Signed HUD <input type="checkbox"/> Signed Commission Check <input type="checkbox"/> Signed PSW Report <input type="checkbox"/> Signed Settlement Info Sheet <input type="checkbox"/> Upload Closing Documents to Command & Submit <input type="checkbox"/> Submit Commission in Command |
| | CLOSE OUT LISTING IN MLS: <input type="checkbox"/> PMAR <input type="checkbox"/> GLVR |

NOTES