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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: | 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"/> 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 <hr/> MORTGAGE APPLICATION & APPRAISAL ORDER: <input type="checkbox"/> Follow Up with Buyer's Agent <hr/> MORTGAGE COMMITMENT: Due Date: _____ Requested: _____ Received: _____ <input type="checkbox"/> Sent to Seller <hr/> 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 | 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 <hr/> BRTI: <input type="checkbox"/> Prepared/Received <input type="checkbox"/> Sent to Seller <hr/> CIT ADDENDUM: <input type="checkbox"/> Prepared <input type="checkbox"/> Sent <input type="checkbox"/> Signed <hr/> 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 <hr/> RESALE ADDITIONAL INFORMATION: Name: _____ Phone: _____ Email: _____ Exp: _____ Cost: _____ <hr/> CERTIFICATE OF OCCUPANCY: <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 <hr/> C/O ADDITIONAL INFORMATION: Township: _____ Phone: _____ Email: _____ Cost: _____ | RIGHT OF FIRST REFUSAL: <input type="checkbox"/> Requested <input type="checkbox"/> Received <hr/> 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: _____ <hr/> 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: _____ <hr/> 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: _____ <hr/> ESCROW CHECK: Request Escrow Check: _____ <input type="checkbox"/> Confirm Receipt <input type="checkbox"/> Conventional Check <input type="checkbox"/> Electronic Check | 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: _____ <hr/> 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 <hr/> 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 <hr/> 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 <hr/> CLOSE OUT LISTING IN MLS: <input type="checkbox"/> PMAR <input type="checkbox"/> GLVR |

NOTES