

PROPERTY ADDRESS:	MLS #:

QUICK REFERENCE				
CONTRACT DATE:	ACCEPTANCE:	SALE PRICE:	SELLER'S ASSIST:	EMD DEPOSIT:

CONTINGENCY DATES				CLOSING INFORMATION	
EXECUTION DATE:	DEPOSIT DUE:	LOAN APP DUE:	ORDER TITLE WORK BY:	DATE:	
				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:

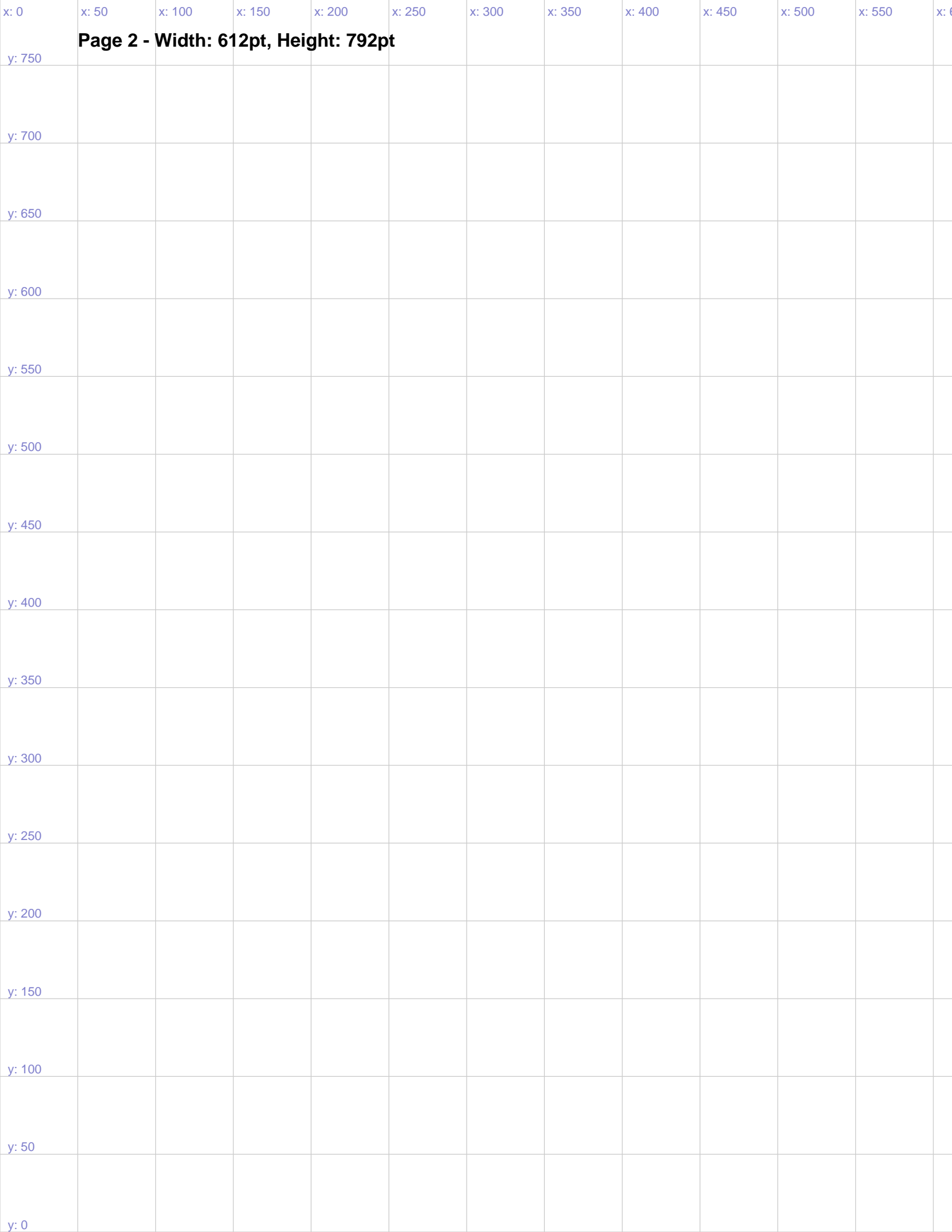
BUYER INFORMATION	SELLER INFORMATION
NAME:	NAME:
PHONE:	PHONE:
ADDRESS:	ADDRESS:
EMAIL:	EMAIL:

LEGAL INFORMATION		
ATTORNEY:	CONTACT:	EMAIL:

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

SERVICE PROVIDERS	
INSPECTION INSPECTOR:	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



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TRANSACTION COORDINATOR TASK LIST

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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: <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 Started

☐ File Submitted

☐ File Approved

☐ Commission Submitted

FILE PREPARATION

☐ Added to Pending Checklist

☐ Added to Calendar

☐ Tasks Set Up

☐ Pended MLS

☐ Added to ShowingTime

INTRODUCTION

☐ Sent to Client

☐ Sent to Agent

☐ Sent to Attorney

☐ Sent to Lender

FINANCIALS & TITLE

DEPOSIT:

☐ Follow Up Sent to Buyer

☐ Second Deposit Received

☐ First Deposit Rcvd

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

☐ Inspection Set: _____

☐ Sent Copy to Buyer

☐ Seller Paid

☐ C/O Received

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: _____

☐ Conventional Check ☐ Electronic Check

☐ Confirm Receipt

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

☐ Repairs Finished

☐ Request Receipts

☐ 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

☐ Reserve Conference Room

Preferred Time: _____ Preferred Location: _____

☐ Clear to Close

☐ Schedule Walkthrough

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 PSW Report

☐ Upload Closing Documents to Command & Submit

☐ Submit Commission in Command

☐ Signed Commission Check

☐ Signed Settlement Info Sheet

CLOSE OUT LISTING IN MLS:

☐ PMAR ☐ GLVR

NOTES