

PROPERTY ADDRESS:	MLS #:
1234 Maple Avenue, Philadelphia, PA 19128	MLS-87654321

QUICK REFERENCE				
CONTRACT DATE:	ACCEPTANCE:	SALE PRICE:	SELLER'S ASSIST:	EMD DEPOSIT:
		\$575000	\$5000	

CONTINGENCY DATES				CLOSING INFORMATION	
EXECUTION DATE:	DEPOSIT DUE:	LOAN APP DUE:	ORDER TITLE WORK BY:	DATE:	2023-08-15
				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:
Sarah Johnson	LISTINGAGENT	

BUYER INFORMATION	SELLER INFORMATION
NAME:	NAME:
David & Emily Wilson	Robert & Maria Thompson
PHONE:	PHONE:
(215) 555-5678	(215) 555-1234
ADDRESS:	ADDRESS:
987 Oak Street, Philadelphia, PA 19106	1234 Maple Avenue, Philadelphia, PA 19128
EMAIL:	EMAIL:
wilsons@example.com	thompson.family@example.com

LEGAL INFORMATION		
ATTORNEY:	CONTACT:	EMAIL:
James Smith, Esq.		

FINANCIAL DETAILS		LENDER INFORMATION
COMMISSION DETAILS		COMPANY:
LIST SIDE %:	BUYER SIDE %:	
3	3	
TOTAL %:	\$ AMOUNT:	PHONE:
6		
SELLER PAID:	BUYER PAID:	EMAIL:

SERVICE PROVIDERS	
INSPECTION	TITLE
INSPECTOR:	COMPANY:
	First American Title Insurance Comp
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
%:	

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	<input type="checkbox"/> SEC
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"/> 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"/> Pending MLS	<input type="checkbox"/> Sent to Lender	
FINANCIALS & TITLE		INSPECTIONS & CONDITION	
DEPOSIT:		HOME INSPECTION SCHEDULED:	
<input type="checkbox"/> Follow Up Sent to Buyer		<input type="checkbox"/> House/Septic Ready	
<input type="checkbox"/> Second Deposit Received		<input type="checkbox"/> Gate Pass	
<input type="checkbox"/> First Deposit Rcvd		Inspection Reports:	
		<input type="checkbox"/> Received	
		<input type="checkbox"/> Sent to Client	
MORTGAGE APPLICATION & APPRAISAL ORDER:		BRTI:	
<input type="checkbox"/> Follow Up with Buyer's Agent		<input type="checkbox"/> Ordered	
		<input type="checkbox"/> Sent to Seller	
MORTGAGE COMMITMENT:		CIT ADDENDUM:	
Due Date: _____		<input type="checkbox"/> Prepared	
Requested: _____		<input type="checkbox"/> Sent	
Received: _____		<input type="checkbox"/> Signed	
<input type="checkbox"/> Sent to Seller			
TITLE WORK:		BRTI REPAIRS:	
<input type="checkbox"/> Title Work Ordered		<input type="checkbox"/> Follow Up with Seller	
<input type="checkbox"/> Seller's Info Sent to Title Co		<input type="checkbox"/> Request Receipts	
<input type="checkbox"/> TC Invoice Sent to Title Company		<input type="checkbox"/> Repairs Finished	
		<input type="checkbox"/> Receipts Received	
RESALE CERTIFICATE & C/O		APPRAISAL, WARRANTY & ROFR	
RESALE CERTIFICATE:		RIGHT OF FIRST REFUSAL:	
Order Resale Certificate By: _____		<input type="checkbox"/> Requested	
Requested Payment from Seller: _____		<input type="checkbox"/> Received	
Seller Paid: _____			
Resale Cert Received:		APPRAISAL:	
<input type="checkbox"/> To Buyer		<input type="checkbox"/> Ordered	
<input type="checkbox"/> To Seller		Scheduled: _____	
<input type="checkbox"/> To Title Co.		Value OK? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Receipt of Documents:		Appraisal Repairs? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Sent to Buyer: _____		(If Yes to Repairs):	
<input type="checkbox"/> Fully Signed		Repairs Completed: _____	
Notify Lender: _____		HOME WARRANTY:	
		<input type="checkbox"/> Ordered	
		<input type="checkbox"/> Sent Invoice to Title	
RESALE ADDITIONAL INFORMATION:		SETTLEMENT & CLOSEOUT	
Name: _____		SETTLEMENT:	
Phone: _____		<input type="checkbox"/> Send Request to Title Company	
Email: _____		<input type="checkbox"/> Clear to Close	
Exp: _____		<input type="checkbox"/> Reserve Conference Room	
Cost: _____		<input type="checkbox"/> Schedule Walkthrough	
		Preferred Time: _____	
CERTIFICATE OF OCCUPANCY:		Preferred Location: _____	
<input type="checkbox"/> Request Payment		SEND SETTLEMENT NOTICE:	
<input type="checkbox"/> Seller Paid		<input type="checkbox"/> List Agent	
<input type="checkbox"/> Inspection Set: _____		<input type="checkbox"/> Seller	
<input type="checkbox"/> C/O Received		<input type="checkbox"/> Buyer	
<input type="checkbox"/> Sent Copy to Buyer		<input type="checkbox"/> Buyer's Agent	
		<input type="checkbox"/> Attorney	
C/O ADDITIONAL INFORMATION:		DOCS & REPORTS:	
Township: _____		Pre-Settlement Walkthrough Report & Settlement Info Sheet:	
Phone: _____		<input type="checkbox"/> Prepared	
Email: _____		<input type="checkbox"/> Sent to Agent	
Cost: _____		Preliminary HUD:	
		<input type="checkbox"/> Requested	
		<input type="checkbox"/> Reviewed	
		<input type="checkbox"/> Shared	
CLOSING PREP		COMMAND UPDATE:	
UTILITY INFO:		<input type="checkbox"/> Signed HUD	
<input type="checkbox"/> Requested from Seller		<input type="checkbox"/> Signed Commission Check	
<input type="checkbox"/> Received		<input type="checkbox"/> Signed PSW Report	
Sent to Buyer: _____		<input type="checkbox"/> Signed Settlement Info Sheet	
CLOSING ATTENDANCE:		<input type="checkbox"/> Upload Closing Documents to Command & Submit	
Client Attending: _____ (If No)		<input type="checkbox"/> Submit Commission in Command	
<input type="checkbox"/> Yes <input type="checkbox"/> No			
<input type="checkbox"/> Docs Sent to Client: _____			
<input type="checkbox"/> Docs Signed Early @ Title: _____			
ESCROW CHECK:		CLOSE OUT LISTING IN MLS:	
Request Escrow Check: _____		<input type="checkbox"/> PMAR	
<input type="checkbox"/> Confirm Receipt		<input type="checkbox"/> GLVR	
<input type="checkbox"/> Conventional Check			
<input type="checkbox"/> Electronic Check			
NOTES			