

\$350000.00

\$5000.00

PROPERTY ADDRESS: \_\_\_\_\_

MLS #: \_\_\_\_\_

QUICK REFERENCE

CONTRACT DATE: \_\_\_\_\_

ACCEPTANCE: \_\_\_\_\_

SALE PRICE: \_\_\_\_\_

SELLER'S ASSIST: \_\_\_\_\_

EMD DEPOSIT: \_\_\_\_\_

CONTINGENCY DATES

EXECUTION DATE: \_\_\_\_\_

DEPOSIT DUE: \_\_\_\_\_

LOAN APP DUE: \_\_\_\_\_

ORDER TITLE WORK BY: \_\_\_\_\_

MTG COMMIT DUE: \_\_\_\_\_

Agent Name

SELLER RESP DUE: \_\_\_\_\_

DUAL AGENT

APPRaisal DATE: \_\_\_\_\_

CLOSING INFORMATION

DATE: \_\_\_\_\_

TIME: \_\_\_\_\_

LOCATION: \_\_\_\_\_

SELLER ATTENDING: ☐ YES ☐ NO

AGENT INFORMATION

AGENT: \_\_\_\_\_

Buyer Name

ROLE: \_\_\_\_\_

OPP. AGENT: \_\_\_\_\_

Seller Name

BUYER INFORMATION

NAME: \_\_\_\_\_

123 Main St, Philadelphia, PA 12345

PHONE: \_\_\_\_\_

buyer@email.com

ADDRESS: \_\_\_\_\_

EMAIL: \_\_\_\_\_

Attorney Name

SELLER INFORMATION

NAME: \_\_\_\_\_

123 Main St, Philadelphia, PA 12345

PHONE: \_\_\_\_\_

seller@email.com

ADDRESS: \_\_\_\_\_

EMAIL: \_\_\_\_\_

LEGAL INFORMATION

ATTORNEY: \_\_\_\_\_

CONTACT: \_\_\_\_\_

EMAIL: \_\_\_\_\_

FINANCIAL DETAILS

COMMISSION DETAILS

LIST SIDE %: 3.00

6.00

BUYER SIDE %: 3.00

TOTAL %: \_\_\_\_\_

\$ AMOUNT: \_\_\_\_\_

SELLER PAID: \_\_\_\_\_

BUYER PAID: \_\_\_\_\_

LENDER INFORMATION

COMPANY: \_\_\_\_\_

PHONE: \_\_\_\_\_

EMAIL: \_\_\_\_\_

SERVICE PROVIDERS

INSPECTION

INSPECTOR: \_\_\_\_\_

CONTINGENCY: \_\_\_\_\_

INSPECTION: \_\_\_\_\_

TITLE

COMPANY: \_\_\_\_\_

PHONE: \_\_\_\_\_

EMAIL: \_\_\_\_\_

Title Company

REFERRAL INFORMATION

DUE TO: \_\_\_\_\_

Referral Party

%: \_\_\_\_\_

20.00

UTILITIES

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

## NOTES