

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

CONTRACT DATE:	ACCEPTANCE:	SALE PRICE: \$575000	SELLER'S ASSIST: \$5000.00	EMD DEPOSIT:
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CONTINGENCY DATES

EXECUTION DATE:	DEPOSIT DUE:	LOAN APP DUE:	ORDER TITLE WORK BY:
MTG COMMIT DUE:	BRTI DUE:	SELLER RESP DUE:	APPRAISAL DATE:

CLOSING INFORMATION

DATE:	2023-08-15
TIME:	
LOCATION:	
SELLER ATTENDING:	<input type="checkbox"/> YES <input type="checkbox"/> NO

AGENT INFORMATION

AGENT: Sarah Johnson	ROLE: LISTINGAGENT	OPP. AGENT:
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BUYER INFORMATION

NAME: David & Emily Wilson
PHONE: (215) 555-5678
ADDRESS: 987 Oak Street, Philadelphia, PA 19106
EMAIL: wilsons@example.com

SELLER INFORMATION

NAME: Robert & Maria Thompson
PHONE: (215) 555-1234
ADDRESS: 1234 Maple Avenue, Philadelphia, PA 19128
EMAIL: thompson.family@example.com

LEGAL INFORMATION

ATTORNEY: James Smith, Esq.	CONTACT:	EMAIL:
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FINANCIAL DETAILS

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

SERVICE PROVIDERS

INSPECTION	TITLE
INSPECTOR:	COMPANY: First American Title Insurance Company
CONTINGENCY:	PHONE:
INSPECTION:	EMAIL:

REFERRAL INFORMATION

DUE TO: ABC Referral Company	%: 25.00
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UTILITIES

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

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: <u>Maple Avenue Community Association</u>	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: _____
Email: _____ Phone: _____ Cost: _____ Exp: _____	HOME WARRANTY: <input type="checkbox"/> Ordered <input type="checkbox"/> Sent Invoice to Title

CERTIFICATE OF OCCUPANCY:	SETTLEMENT & CLOSEOUT
<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	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: _____
C/O ADDITIONAL INFORMATION: Township: <u>Philadelphia County</u> Phone: _____ Email: _____ Cost: _____	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
UTILITY INFO: <input type="checkbox"/> Requested from Seller <input type="checkbox"/> Received Sent to Buyer: _____	DOCS & REPORTS: Pre-Settlement Walkthrough Report & Settlement Info Sheet: <input type="checkbox"/> Prepared <input type="checkbox"/> Sent to Agent
CLOSING ATTENDANCE: (If No) Client Attending: _____ <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Docs Sent to Client: _____ <input type="checkbox"/> Docs Signed Early @ Title: _____	Preliminary HUD: <input type="checkbox"/> Requested <input type="checkbox"/> Reviewed <input type="checkbox"/> Shared
ESCROW CHECK: Request Escrow Check: _____ <input type="checkbox"/> Confirm Receipt <input type="checkbox"/> Conventional Check <input type="checkbox"/> Electronic Check	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

CLOSING PREP
NOTES <div style="height: 100px; border: 1px solid black;"></div>