

## DUAL AGENT

<b>PROPERTY ADDRESS:</b> 123 Test Street, Philadelphia, PA 19123	<b>MLS#:</b> MLS12345	<b>AGENT:</b> John Test Smith
<b>CLOSING DATE:</b>	<b>TIME:</b>	<b>LOCATION:</b>

### INITIAL DOCUMENTATION

☐ AOS   ☐ Check   ☐ SPD   ☐ PreQual/POF   ☐ SEC   ☐ Wire Notice   ☐ HW  
☐ Deed   ☐ Referral Form   ☐ RLBPHD   ☐ FYP Form   ☐ WN   ☐ DMN  
☐ CN   ☐ Dual Agency   ☐ KPSS ABA Form   ☐ BEC   ☐ BAC  
☐ KW Disclosure   ☐ CBC  
**KW Addendum signed:**   ☐ Buyer   ☐ Seller   ☐ Agent

### CONTRACT PROCESSING

☐ File started   ☐ Submitted Contract Folder   ☐ Approved  
☐ Commission Submitted   ☐ Added to Pending Checklist   ☐ Date on Calendar  
☐ Tasks set up  
**Intro & AOS Copy to:**   ☐ Buyer   ☐ Bank   ☐ Attorney   ☐ Seller

### DEPOSITS & MORTGAGE

**EMD Due:** \_\_\_\_\_ **Amount:** \_\_\_\_\_  
**Follow up on:**   ☐ Deposit   ☐ Mortgage Application   ☐ Appraisal  
☐ 1st Deposit received   ☐ 2nd Deposit received

### INSPECTIONS & REPORTS

☐ Inspection Instructions sent to Seller   ☐ Pass @ Gate  
☐ Home Inspection Scheduled   ☐ House & Septic Ready  
**Inspection Types:**   ☐ General   ☐ Termite   ☐ Radon   ☐ Water   ☐ Septic  
**Inspection Date:** \_\_\_\_\_ **Inspector:** \_\_\_\_\_  
☐ Inspection Reports received   ☐ sent to Buyer   ☐ BRTI Prepared   ☐ sent to Seller  
☐ CIT Prepared   ☐ Sent   ☐ Signed

### RESALE CERTIFICATE & C/O

**Resale Certificate:**   ☐ Order Resale Cert.   ☐ Request Payment from Seller  
☐ Check Sent   ☐ Received   ☐ Copy sent to Buyer   ☐ Title Co  
**Receipt of Documents:**   ☐ sent   ☐ Receipt of Documents signed  
**C/O Req Payment:**   ☐ Sent   **INSPECTION DATE:** \_\_\_\_\_  
☐ Copy to Buyer

### APPRAISAL & MORTGAGE

**Mortgage Type:** \_\_\_\_\_  
**Appraisal:**   ☐ Ordered   ☐ Scheduled   ☐ Value OK?  
**Repairs:**   ☐ Repairs Needed   ☐ No Repairs Needed   ☐ Completed  
☐ Notified Lender  
**Mortgage Commitment Due:** \_\_\_\_\_   ☐ Requested   ☐ Received

### WARRANTY, REPAIRS, & UTILITY INFO

**Utility Info:**   ☐ Received   ☐ Sent  
**Warranty:**   ☐ Yes   ☐ No   ☐ Ordered   ☐ Invoice sent to Title Company  
**Warranty Company:** \_\_\_\_\_  
**Warranty Cost:** \_\_\_\_\_ **Paid By:**   ☐ Seller   ☐ Buyer  
**BRTI repairs:**   ☐ Repairs finished   ☐ request receipts  
☐ Receipts received and sent to Agent/Buyer

### CLOSING

**Seller attending:**   ☐ Yes   ☐ No   ☐ Mailed Docs   ☐ Sign early at Title Office  
☐ Requested Escrow Check   ☐ Confirmed Receipt

### CLOSING DATE TRACKING

**Closing Date:** \_\_\_\_\_   ☐ Confirmed  
☐ All Parties Notified   ☐ Extension Signed   ☐ Calendar Updated  
**Closing Time Preferred:** \_\_\_\_\_

### COMMISSION DETAILS

**Buyer's Agent %:**   
**Listing Agent %:**    **Seller Paid Commission:** \_\_\_\_\_  
**Total Commission %:**    **Buyer Paid Commission:** \_\_\_\_\_

### BUYER

**NAME:** Buyer Test Client  
**ADDRESS:** 100 Buyer Ave, Philadelphia, PA 19123  
**PHONE:** 215-555-6789  
**EMAIL:** buyer@example.com

### SELLER

**NAME:** Seller Test Client  
**ADDRESS:** 200 Seller St, Philadelphia, PA 19123  
**PHONE:** 215-555-4321  
**EMAIL:** seller@example.com

### ATTORNEY

**NAME:** John Attorney  
**CONTACT:** \_\_\_\_\_

### AGENT INFORMATION

**NAME:** John Test Smith  
**PHONE:** \_\_\_\_\_  
**EMAIL:** \_\_\_\_\_

### TITLE AGENT INFORMATION

**NAME:** Test Title Company  
**PHONE:** \_\_\_\_\_  
**EMAIL:** \_\_\_\_\_  
☐ TITLE ORDERED   ☐ ROFR   ☐ TC INVOICE SENT

### HOA INFORMATION

☐ YES   ☒ NO  
**ASSOCIATION:**    **RESALE EXPIRES:** \_\_\_\_\_  
**EMAIL:** \_\_\_\_\_ **PHONE:** \_\_\_\_\_  
**SELLER SENT PAYMENT ON:** \_\_\_\_\_  
**NAME:** Seller Test Client  
**CONTACT:** \_\_\_\_\_

### RESALE CERTIFICATE RECEIVED

☐ RECEIVED  
**NOTES:** \_\_\_\_\_

### CERTIFICATE OF OCCUPANCY

☐ YES   ☒ NO  
**MUNICIPALITY:**   
**REQUESTED:** \_\_\_\_\_ **RECEIVED:** \_\_\_\_\_  
**C/O INSPECTION ON:** \_\_\_\_\_

### LENDER INFORMATION

**NAME:** \_\_\_\_\_  
**PHONE:** \_\_\_\_\_  
**EMAIL:** \_\_\_\_\_

### INSPECTION DETAILS

**INSPECTOR:** \_\_\_\_\_  
**CONTINGENCY DATE:** \_\_\_\_\_ **INSPECTION DATE:** \_\_\_\_\_

### UTILITIES INFORMATION

**WATER TYPE:** \_\_\_\_\_ **SEWER TYPE:** \_\_\_\_\_

### REFERRAL INFORMATION

☐ YES   ☒ NO  
**DUE TO:**    **{{referralFee}}%**

### NOTES

\_\_\_\_\_  
 \_\_\_\_\_

### QUICK REFERENCE

**Contract Date:** \_\_\_\_\_  
**Acceptance Date:** \_\_\_\_\_  
**Price:** 350,000  
**Seller's Assist:**