

| | |
|-------------------|-------------|
| PROPERTY ADDRESS: | MLS #: |
| <div></div> | <div></div> |

| | | | | |
|-----------------|-----------------------------|-------------|------------------|--------------|
| QUICK REFERENCE | | | | |
| CONTRACT DATE: | Test Agent Name | SALE PRICE: | SELLER'S ASSIST: | EMD DEPOSIT: |
| <div></div> | ACCEPTANCE: listingAgent | <div></div> | <div></div> | <div></div> |

| | | | | | |
|-------------------|-------------|---|------------------|--|-------------|
| CONTINGENCY DATES | | 223 Test Street, Philadelphia, PA 12345 | | CLOSING INFORMATION | |
| EXECUTION DATE: | DEPOSIT | TEST-12345 | LOAN APP DUE: | ORDER TITLE WORK BY: | DATE: |
| <div></div> | <div></div> | <div></div> | <div></div> | <div></div> | <div></div> |
| MTG COMMIT DUE: | BRTI DUE: | | SELLER RESP DUE: | APPRAISAL DATE: | TIME: |
| <div></div> | <div></div> | <div></div> | <div></div> | <div></div> | <div></div> |
| | | | | LOCATION: | |
| | | | | SELLER ATTENDING: <input type="checkbox"/> YES <input type="checkbox"/> NO | |

| | | |
|-------------------|------------------|-------------|
| AGENT INFORMATION | | |
| AGENT: | ROLE: | OPP. AGENT: |
| <div></div> | John Test Client | <div></div> |

| | | | |
|-------------------|--------------------------------------|--------------------|--|
| BUYER INFORMATION | | SELLER INFORMATION | |
| NAME: | john.test@example.com | NAME: | |
| <div></div> | 2155551234 | <div></div> | |
| PHONE: | 456 Test Ave, Philadelphia, PA 12345 | PHONE: | |
| <div></div> | SELLER | <div></div> | |
| ADDRESS: | | ADDRESS: | |
| <div></div> | 6% | <div></div> | |
| EMAIL: | 3% | EMAIL: | |
| <div></div> | | <div></div> | |

| | | |
|-------------------|--------|-------------|
| LEGAL INFORMATION | | |
| ATTORNEY: | 3% | EMAIL: |
| <div></div> | \$5000 | <div></div> |
| CONTACT: | | |
| <div></div> | | |

| | | |
|--------------------|---------------|--------------------|
| FINANCIAL DETAILS | | |
| COMMISSION DETAILS | | LENDER INFORMATION |
| LIST SIDE %: | BUYER SIDE %: | COMPANY: |
| <div></div> | <div></div> | <div></div> |
| TOTAL %: | \$ AMOUNT: | PHONE: |
| <div></div> | <div></div> | <div></div> |
| SELLER PAID: | BUYER PAID: | EMAIL: |
| <div></div> | <div></div> | <div></div> |

| | |
|-------------------|-------------|
| SERVICE PROVIDERS | |
| INSPECTION | TITLE |
| INSPECTOR: | COMPANY: |
| <div></div> | <div></div> |
| CONTINGENCY: | PHONE: |
| <div></div> | <div></div> |
| INSPECTION: | EMAIL: |
| <div></div> | <div></div> |

| | | | |
|----------------------|-------------|---|--|
| REFERRAL INFORMATION | | UTILITIES | |
| DUE TO: | %: | WATER: <input type="checkbox"/> PRIVATE <input type="checkbox"/> PUBLIC SEWER: <input type="checkbox"/> PRIVATE <input type="checkbox"/> PUBLIC | |
| <div></div> | <div></div> | | |

Test HOA

Philadelphia

Test Attorney

Test Title Company

This is a test of special instructions that might be longer text

Urgent test issues would go here

Additional notes for testing purposes would appear here

2025-05-02

Test Agent Signature

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 <hr/> MORTGAGE APPLICATION & APPRAISAL ORDER: <input type="checkbox"/> Follow Up with Buyer's Agent <hr/> MORTGAGE COMMITMENT: Due Date: _____ Requested: _____ Received: _____ <input type="checkbox"/> Sent to Seller <hr/> 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 | 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 <hr/> BRTI: <input type="checkbox"/> Prepared/Received <input type="checkbox"/> Sent to Seller <hr/> CIT ADDENDUM: <input type="checkbox"/> Prepared <input type="checkbox"/> Sent <input type="checkbox"/> Signed <hr/> 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 <hr/> RESALE ADDITIONAL INFORMATION: Name: _____ Phone: _____ Email: _____ Exp: _____ Cost: _____ <hr/> CERTIFICATE OF OCCUPANCY: <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/> C/O ADDITIONAL INFORMATION: Township: _____ Phone: _____ Email: _____ Cost: _____ | RIGHT OF FIRST REFUSAL: <input type="checkbox"/> Requested <input type="checkbox"/> Received <hr/> 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: _____ <hr/> HOME WARRANTY: <input type="checkbox"/> Ordered <input type="checkbox"/> Sent Invoice to Title |

| CLOSING PREP | SETTLEMENT & CLOSEOUT |
|---|---|
| UTILITY INFO: <input type="checkbox"/> Requested from Seller <input type="checkbox"/> Received Sent to Buyer: _____ <hr/> CLOSING ATTENDANCE: 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/> ESCROW CHECK: Request Escrow Check: _____ <input type="checkbox"/> Confirm Receipt <input type="checkbox"/> Conventional Check <input type="checkbox"/> Electronic Check | 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: _____ <hr/> 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 <hr/> DOCS & REPORTS: 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/> 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 <hr/> CLOSE OUT LISTING IN MLS: <input type="checkbox"/> PMAR <input type="checkbox"/> GLVR |

NOTES