

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

QUICK REFERENCE				
CONTRACT DATE:	ACCEPTANCE:	SALE PRICE:	SELLER'S ASSIST:	EMD DEPOSIT:
<div></div>	<div></div>	<div></div>	<div></div>	<div></div>

CONTINGENCY DATES				CLOSING INFORMATION
EXECUTION DATE:	DEPOSIT DUE:	LOAN APP DUE:	ORDER TITLE WORK BY:	DATE: <div></div>
<div></div>	<div></div>	<div></div>	<div></div>	TIME: <div></div>
MTG COMMIT DUE:	BRTI DUE:	SELLER RESP DUE:	APPRAISAL DATE:	LOCATION: <div></div>
<div></div>	<div></div>	<div></div>	<div></div>	SELLER ATTENDING: <input type="checkbox"/> YES <input type="checkbox"/> NO

AGENT INFORMATION		
AGENT:	ROLE:	OPP. AGENT:
<div></div>	<div></div>	<div></div>

CLIENT INFORMATION	CLIENT INFORMATION
NAME: <div></div>	NAME: <div></div>
PHONE: <div></div>	PHONE: <div></div>
ADDRESS: <div></div>	ADDRESS: <div></div>
EMAIL: <div></div>	EMAIL: <div></div>

LEGAL INFORMATION		
ATTORNEY:	CONTACT:	EMAIL:
<div></div>	<div></div>	<div></div>

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

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

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

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: _____ Email: _____ Phone: _____ Cost: _____ Exp: _____	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: _____
C/O ADDITIONAL INFORMATION: Township: _____ Phone: _____ Email: _____ Cost: _____	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: _____	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: _____
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: _____	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
ESCROW CHECK: Request Escrow Check: _____ <input type="checkbox"/> Confirm Receipt <input type="checkbox"/> Conventional Check <input type="checkbox"/> Electronic Check	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
	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

NOTES