

TRANSACTION COORDINATION

SELLER/LISTING TEMPLATE

Review Contract for any missing information

Send under contract email to Buyer Agent (cc - listing agent client)

Send Under Contract Intro Email to Agent & Seller Client (cc- Closing Attorney)

Send calendar invites for Important Dates to Keep Note of

Upload executed contract to compliance system & monday

Change status of property on MLS (fmls & gamls)

SEND: Under Contract Text 1 - SELLER REPRESENTATION & Their Seller Client

Send Template: EMD Request to BUYER AGENT

Request seller fill out the utility form/approximate cost for bills

Send Utility Providers List to Buyer Agent

Create commission agreement based on listing agreement send to all parties in BM (usually 6% but check to be certain!)

Send TEXT Template: Commission agreement

Complete CDA Process based on Agent Onboarding Sheet

Agent/ lender check in on loan status

Agent check in on appraisal status

Prepare for removal of lockbox & transfer of keys

Check agent compliance system for broker updates/requests

Confirm all repairs have been completed from seller

Send the before closing email for sellers

Set up closing day experience

Request Settlement Statement from Closing Attorney - Share w/ Seller & Listing agent

Mark home as sold on FMLS & GAMLS

CASH BUYER - GEORGIA

Review Contract for any missing information

Fill in ALL categories in the Monday.com board with the dates, lender info, etc

Confirm w/ Agent that they have a client signed BBA, upload to compliance system once retrieved.

Upload the Binding Contract into Agent compliance

Send Buyer Under Contract Email within 12 hours of receipt

SEND: Under Contract Group Text 1 to Agent & Their Buyer Client

Send Listing Agent Under Contract Email

Send calendar invites for Important Dates to Keep Note of

Schedule home inspection & notify all parties

Social Media Post Creation (Under Contract)

Ensure EMD Instructions were delivered to client from closing attorney (if applies)

END: EMD Text 1 to Agent & Buyer client in Group Text (1 day after)

SEND: EMD Text 2 to Agent & Buyer client in Group Text (2 days after contract)

Upload the EMD confirmation into Agent Compliance

SEND: Request for Inspection Report / ATAC Update Text to Agent Only

SEND: Request for Inspection Report / ATAC Update Email to Agent Only

Send ATAC & Inspection Report to listing agent (use template)

Order the home warranty (per contract/ATAC)

Notify Agent that the home warranty was ordered

Send the Home Warranty invoice to Closing Attorney, CC: All parties involved in the transaction.

Request Commission Agreement from Listing Agent

SEND Email & Text Templates to Agent: Transaction Fee - TO BUYER AGENT ONLY DO NOT INCLUDE TO CLIENT

Send Commission Agreement to Closing Attorney w/ client BBA (if applies)

Confirm the utility information form was filled out by the Listing agent

Once Utility provider info is received from Listing agent forward to the buyer via Email

SEND GROUP TEXT: Utility Provider Info Confirmation - TO CLIENT GROUP TEXT w/ AGENT

Obtain all invoices/receipts for repairs from listing agent (Refer to ATAC)

SEND TEXT TO AGENT ONLY: Scheduling time for closing

Schedule Closing Day & Time w/ Closing Attorney via Email

Set Up Closing Day Video

Obtain Termite letter from listing agent & send to attorney (if applicable- check original contract & ATAC)

Ensure that ATAC & ALL amendments have been sent to the closing attorney and uploaded into the Agent compliance system!

Complete Agent Pay at Close Brokerage form

Send out Agent Pay at Close to Closing Attorney

Confirm appraisal has been completed & value is sufficient

Schedule Final Walk w/ Agent & client

Send client email template: Before Closing (What to Expect @ Closing)

Request How Keys will be exchanged from Listing agent (text template)

Confirm the closing packet was received by the attorney email template: Closing Update (Package from Lender) CLOSING ATTORNEY

Confirm that the buyer has received wiring instructions text: Wire Instructions for closing - BUYER

Schedule email template to Closing Attorney requesting the Settlement Statement

Social Media Post (Closed)

FINANCING

Review Contract for any missing information

Fill in ALL categories in the Monday.com board with the dates, lender info, etc

Check Agent contract writing system for a client signed BBA, upload to compliance system once retrieved.

Upload the Binding Contract into Agent compliance system

Send Buyer Under Contract Email within 12 hours of receipt

Send Listing Agent Under Contract Email

Send calendar invites for Important Dates to Keep Note of

SEND: Under Contract Group Text 1 to Agent & Their Buyer Client

Schedule home inspection & notify all parties - if requested

Social Media Post Creation (Under Contract)

Ensure EMD Instructions were delivered to client from closing attorney (if applies)

SEND: EMD Text 1 to Agent & Buyer client in Group Text (1 day after)

SEND: EMD Text 2 to Agent & Buyer client in Group Text (2 days after contract)

Upload the EMD confirmation into Agent Compliance

SEND: Request for Inspection Report / ATAC Update Text to Agent Only

SEND: Request for Inspection Report / ATAC Update Email to Agent Only

Send ATAC & Inspection Report to listing agent (use template)

Order the home warranty (per contract/ATAC)

Notify Agent that the home warranty was ordered

Send the Home Warranty invoice to Closing Attorney, CC: All parties involved in the transaction.

Request Commission Agreement from Listing Agent

SEND Email & Text Templates to Agent: Transaction Fee - TO BUYER AGENT ONLY DO NOT INCLUDE TO CLIENT

Send Commission Agreement to Closing Attorney w/ client BBA (if applies)

Confirm the utility information form was filled out by the Listing agent

Once Utility provider info is received from Listing agent forward to the buyer via Email

SEND GROUP TEXT: Utility Provider Info Confirmation - TO CLIENT GROUP TEXT w/ AGENT

SEND: Loan Update - Lender Check in

SEND TEXT TO AGENT ONLY: Scheduling time for closing

Schedule Closing Day & Time w/ Closing Attorney via Email

Obtain Termite letter from listing agent & send to attorney (if applicable- check original contract & ATAC)

Ensure that ATAC & ALL amendments have been sent to closing attorney and uploaded into Agent compliance system!

Complete Agent Pay at Close Brokerage form

Confirm appraisal has been completed & value is sufficient

Schedule Final Walk w/ Agent & client

Confirm that Lender sent Closing Disclosure (CD)

SEND: Confirm Clear to Close w/ lender email template

Send client email template: Before Closing (What to Expect @ Closing)

Prepare to order closing gift

Send/Update the current calendar invite for closing day!

Set Up Closing Day Video

Request How Keys will be exchanged from Listing agent (text template)

Confirm the closing packet was received by the attorney email template: Closing Update

(Package from Lender) CLOSING ATTORNEY

Send out Agent Pay at Close to Closing Attorney

Confirm that the buyer has received wiring instructions text: Wire Instructions for closing -
BUYER
Schedule email template to Closing Attorney requesting the Settlement Statement
Obtain all invoices/receipts for repairs from listing agent (Refer to ATAC)
Social Media Post (Closed)
Request final settlement statement
Follow up w/ listing agent & closing attorney for executed T&R (if terminated)
Termination
Send Thank You Email: Post Close Thank You & Review Request 1 (Updated)
If this is a new construction home, schedule a reminder to schedule the home warranty walk
through with the builder