

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:
 Follow Up Sent to Buyer First Deposit Rcvd
 Second Deposit Received

MORTGAGE APPLICATION & APPRAISAL ORDER:
 Follow Up with Buyer's Agent

MORTGAGE COMMITMENT:
 Due Date: _____ Requested: _____
 Received: _____ Sent to Seller

TITLE WORK:
 Title Work Ordered Seller's Info Sent to Title Co
 TC Invoice Sent to Title Company

HOME INSPECTION SCHEDULED:
 House/Septic Ready Gate Pass
 Inspection Reports:
 Received Sent to Client

BRTI:
 Prepared/Received Sent to Seller

CIT ADDENDUM:
 Prepared Sent Signed

BRTI REPAIRS:
 Follow Up with Seller Request Receipts
 Repairs Finished Receipts Received

RESALE CERTIFICATE & C/O	APPRAISAL, WARRANTY & ROFR
--------------------------	----------------------------

RESALE CERTIFICATE:
 Order Resale Certificate By: _____
 Requested Payment from Seller: _____
 Seller Paid: _____
 Resale Cert Received:
 To Buyer To Seller To Title Co.
 Receipt of Documents:
 Sent to Buyer: _____ Fully Signed

RESALE ADDITIONAL INFORMATION:
 Name: _____ Phone: _____
 Email: _____ Exp: _____
 Cost: _____

CERTIFICATE OF OCCUPANCY:
 Request Payment Seller Paid
 Inspection Set: _____ C/O Received
 Sent Copy to Buyer

C/O ADDITIONAL INFORMATION:
 Township: _____ Phone: _____
 Email: _____ Cost: _____

RIGHT OF FIRST REFUSAL:
 Requested Received

APPRAISAL:
 Ordered Scheduled: _____
 Value OK? Yes No Appraisal Repairs? Yes No
 (If Yes to Repairs):
 Repairs Completed: _____ Notify Lender: _____

HOME WARRANTY:
 Ordered Sent Invoice to Title

CLOSING PREP	SETTLEMENT & CLOSEOUT
--------------	-----------------------

UTILITY INFO:
 Requested from Seller Received
 Sent to Buyer: _____

CLOSING ATTENDANCE:
 Client Attending: _____ (If No)
 Yes No Docs Sent to Client: _____
 Docs Signed Early @ Title: _____

ESCROW CHECK:
 Request Escrow Check: _____ Confirm Receipt
 Conventional Check Electronic Check

SETTLEMENT:
 Send Request to Title Company Clear to Close
 Reserve Conference Room Schedule Walkthrough
 Preferred Time: _____ Preferred Location: _____

SEND SETTLEMENT NOTICE:
 List Agent Seller Buyer Buyer's Agent Attorney

DOCS & REPORTS:
 Pre-Settlement Walkthrough Report & Settlement Info Sheet:
 Prepared Sent to Agent
 Preliminary HUD:
 Requested Reviewed Shared

COMMAND UPDATE:
 Signed HUD Signed Commission Check
 Signed PSW Report Signed Settlement Info Sheet
 Upload Closing Documents to Command & Submit
 Submit Commission in Command

CLOSE OUT LISTING IN MLS:
 PMAR GLVR

NOTES