Sample Checklist for Transaction Coordinators

Varies depending on which State you are in

* Confirm all Docs are Completed & Signed Correctly
* Send Welcome Email/Contact docs to lender, Title Companies and Other Agent
* Email Client Intro Email & CC Agent
* Listing ONLY: email agent verifying all contingencies are added to MLS
* Add Agent to Commission Plan
* Confirm Admin Fee Amount ($395 per agent)
* Confirm Home Inspection Date/Time/Inspector
* Confirm septic inspection is needed
* Confirm Title Company has CR disclosure & Client Info
* Verify who is to order the termite inspection
* Upload EMD receipt – Receive the EMD from the Title Company
* Confirm Inspection results
* Send Clear Termite & Moisture Report to All Closing Parties
* Follow up on repair request addendum
* Listing ONLY: email agent verifying all contingencies are removed from MLS
* Confirm Appraisal is Ordered
* Confirm survey was ordered if requested
* Do we have clear title/title commitment received
* Lender Follow-up to check status of appraisal and loan
* Confirm if there is a home warranty on the contract to order & order if applicable
* Email all parties to see if we are on target to close
* Request Prelim CD/ALTA to review before closing
* Verify Closing Date & Time with Agent and Closing Company
* Confirm walk through Date/Time
* Send Client closing info with utilities & closing checklist
* Email to remove post sign from property
* Request fully signed CD/ALTA
* Check on status of Check or Wire
* Confirm Brokermint info matches CD (closing date/price/etc)
* Has the Commission Check been Deposited?
* Email agent to verify marked SOLD in MLS