

Transaction Coordinator Services: Seller Side

Compile Purchase and Sale Agreement

- ✓ Read through PSA in detail
- ✓ Ensure all dates have been filled in
 - If Seller doesn't sign PSA but does sign Counter Offer, ensure they have received PSA through paper trail.
- ✓ All initials and signatures are present
- ✓ Log all Buyer/selling agent/listing agent/seller/title/lender/inspectors contact information
- ✓ All transactions filed with GO Pending Department
- ✓ Create Transaction timeline in Document Manager
- ✓ Signed documents are given to all parties including seller/agents/title
 - Title to begin Preliminary Title Commitment
 - Copies of Title Commitment sent to client and agent
- ✓ Obtain buyers pre-qualification letter from buyer's agent
- ✓ Verify property has been updated in MLS to Pending status
- ✓ Every document to be input and managed through Document Manager for review by GO Staff and Agent

Counter Offers and Addendum/Amendments

- ✓ Verify all counter offers are acquired and numbered sequentially
 - Inspect offers in detail to ensure they are clear
- ✓ Verify all addendum/amendments are acquired
 - Make note of all changes
 - Adjust timelines accordingly

Disclosures

- ✓ Sellers Property Disclosure
 - All Signed
- ✓ Lead Based Paint Disclosure
 - Have signed and dated copy with PSA (same date as PSA)
 - All parties' signatures

Representation Agreements

- ✓ Signed copy of Seller Representation Agreement
 - Agent and Client Signatures

Inspections

- ✓ File all Inspection Contingency's
 - File sellers response
 - RE-10 if seller agrees to repairs or Seller does not agree to repairs
 - Fully signed RE-10 agreeing to terms
- ✓ Schedule repairs as necessary/requested
 - Obtain receipts for Buyer
- ✓ CC&R's have been delivered and approved
 - Verify it is no later than inspection timeline
- ✓ Upload all documentation into Document Manager

Appraisal

- ✓ Check MLS to change "Call Listing Agent" for access

Client Reminders

- ✓ Remind seller to give a generous utility transfer timeline for buyers
- ✓ Seller inspection reminders
 - What to expect
- ✓ Schedule Final Walk through with Agent/Buyer
 - Notify seller and remind to have utilities in use
 - Coordinate generous utility transfer so no transfer fee to buyers

Closing

- ✓ Verify loan is approved and loan documents are ordered as early as possible
- ✓ Schedule signing appropriately so funds are ready by contract date
- ✓ Schedule with Agent/Seller/Title
- ✓ Request and review closing statements 24 hours before signing.
 - Upon agent approval, send copy to client
- ✓ Arrange key/garage door opener transfer

After Closing

- ✓ Arrange closing gifts
- ✓ Hand written thank you notes
- ✓ Follow up plan- May be customized to Agent's preferences
 - 1 week phone call
 - 30 day phone call
 - Hand written birthday card

Please notify me of how I can exceed your expectations!

