

TRANSACTION COORDINATION CHECKLIST
(For use when working with Transaction Coordinator)

Agent completes this section

Street Address: _____ City: _____ State: _____ Zip: _____
Seller Name(s): 1. _____ 2. _____ Seller Home #: _____
Seller 1 Cell #: _____ Seller 2 Cell #: _____
Seller 1 Work #: _____ Seller 2 Work #: _____
Seller 1 email: _____ Seller 2 email: _____
Vacant: ☐ Yes ☐ No Contract Amount: _____ Lockbox: ☐ eKey ☐ Combination

Agent

- ☐ Complete all tasks on Pending Contracts Checklist
- ☐ Check MLS to ensure listing is pending and correct agents have been
- ☐ credited Send this form to Transaction Coordinator

Transaction Coordinator

Buyer Contract

- ☐ Introduce yourself to the Buyer, Agents, and Lender via phone and email explaining what you'll be doing.
- ☐ Send Buyer a list of home inspectors
- ☐ Coordinate home inspection with Seller and their Agent
- ☐ Check in weekly with Buyer's lender
- ☐ If being paid for by Buyer, order home warranty, ensure there are no exclusions and submit report to title company
- ☐ Send "Important Contact Information" form to Buyer
- ☐ Obtain Appraisal Results
- ☐ Confirm with Seller that all repairs have been completed
- ☐ Follow up with Seller's agent to get receipts for repairs
- ☐ Coordinate final walk-through with title company, agents and clients
- ☐ Notify Seller's Agent when utilities have been reassigned to Buyer
- ☐ Coordinate closing with lender, Title Company, agents and clients
- ☐ 1 week prior to closing, notify Buyer to transfer utilities into their name to be scheduled the day of closing
- ☐ Request preliminary HUD from Title Company 1 week prior to closing & send to Agent to review
- ☐ Request Closing Disclosure from Lender 1 week prior to close
- ☐ Obtain final HUD from Title Company & send to Agent to review
- ☐ Send **final** HUD
- ☐ Send a satisfaction survey after closing

Seller Contract

- ☐ Introduce yourself to the Seller and Agents via phone and email about what you'll be doing.
- ☐ Send a list of preferred vendors for repairs to Seller
- ☐ Send a list of radon mitigation companies to Seller
- ☐ If being paid for by Seller, order home warranty, ensure there are no exclusions and submit report to title company
- ☐ Coordinate termite inspection with Seller
- ☐ Coordinate home warranty entrance, if applicable
- ☐ Coordinate appraisal with Seller
- ☐ Obtain Appraisal Results
- ☐ Confirm with Seller that all repairs have been completed
- ☐ Reconcile repair receipts to list of requested repairs
- ☐ After reconciliation, send receipts to Buyer's Agent at least 1 week prior to closing
- ☐ 1 week prior to closing, confirm with Seller utilities are taken out of their name scheduled for the day of closing
- ☐ Verify what is to remain at the home per contract
- ☐ Notify Agent when to pick up sign and lock-box
- ☐ Send a satisfaction survey after closing
- ☐ Request preliminary HUD from Title Company 1 week prior to closing & send to Agent to review
- ☐ Obtain final HUD from Title Company & send to Agent to review
- ☐ Send **final** HUD

Ongoing

- ☐ Obtain the Home Inspection Contingency Release and other miscellaneous addenda, send to [processing](#) and ensure both Agents have them
- ☐ Check in weekly with the Buyer's lender
- ☐ Post daily updates in the Dropbox file