



Closing with Cara
TRANSACTION COORDINATOR

TC Tasks & Services

WHEN A TRANSACTION IS UNDER CONTRACT I WILL:

- Handle closing documents, securely
- Keep everyone informed- Introduction email will be sent providing datelines and a copy of executed contract to Listing Agent, Buyers Agent, Buyer/Seller, Lender and Title Company & your client (as appropriate)
- Ensure everything is fully executed with proper dates, initials and signatures
- Ensure broker information is completed and reach out for corrections as necessary, monitoring compliance with the contract
- Submit all required under contract documents to compliance within 48 hours of execution
- Send/request disclosure packages and gather signatures
- Ensure the Lender, Title Company, and Broker receive any amendments or changes to the contract
- Contact title company for a copy of the EM check receipt and email receipt to co-op agent and include in compliance file
- Keeping in contact with the title company and lender throughout the transaction. Provide agent email updates on the status of the transaction
- Update deadlines from amend-extends
- Collect HOA documents in accordance with deadlines and email to buyer agent (if on list side) or to buyer (if on buyer side)
- Order Home Warranty per contract, if required
- Coordinate and monitor status of buyers loan with Loan Officer

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- Confirm inspection has been set up in accordance with offer deadline
- Monitor appraisal timeline and completion with the lender
- Remind agent to draft Commission Disp request. If TC is completing CDA request, form MUST BE approved by agent before submitting to escrow and compliance
- Check-in with the Lender regarding the appraisal and any work orders or appraised value issues
- Ensure represented client is provided a copy of all documents
- Upload all disclosures, documents, and reports into agents online transaction management service as they are received or fully executed throughout the transaction. (if applicable)
- Provide access to transaction coordinator's transaction management service 24/7 to all parties to the transaction (if applicable)
- Maintain constant contact with all parties involved for status updates as well as outstanding items
- Coordinate and confirm final walk-through
- Schedule closing appointment for client and agent, if applicable
- Confirm closing date and time has been set up with the seller, buyer, agent, and co-op agent in a timely manner
- Confirm final recording and alert agents
- Conduct a final audit of the file 7 days prior to closing to ensure all documents are uploaded and the file is complete
- Upload Final HUD/CD to online transaction management service for agent compliance

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THIS SERVICE INCLUDES
ALL THE ABOVE (CONTRACT TO CLOSE TRANSACTION)
PLUS:

BUYERS SIDE:

- Upload buyers Rep Agreement and all Broker required forms
- Submit all executed contracts, counter-proposals, and amendment extensions (if applicable) to the lender
- Arrange EMO pick up/remind the buyer to wire as necessary
- Upload all forms, amendments, and addendums for compliance
- Follow up on repairs and receipts
- Provide utility contact info and remind the buyer to transfer utilities
- Coordinate Key transfer
- Coordinate Closing Gift per agent instructions. (if needed)

SELLERS SIDE:

- Listing Agreement and all Broker required forms
- Follow up signatures of all documents
- Upload all forms, amendments, and addendums for compliance
- Follow up on repairs and receipts
- MLS Data input to pending inspection, pending, & closed
- Coordinate Closing Gift per agent instructions. (if needed)
- Order For sale sign down

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AGENT EXPECTATIONS DURING TRANSACTION:

- Review escrow instructions and settlement statements
- Review preliminary title reports
- Negotiate repairs and/or any changes in contract
- Advise the client of any contingency timeline removals (we will remind all parties of the dates and timeframes in the introductory email)
- If TC is drafting documents, the agent will review before being sent to client (if applicable)

FEE SCHEDULE:

- Listing or Buyer Side: \$495.00
- Dual Agent Transaction: \$695.00
- MLS Input: \$100
- Compliance Only: \$150
- Services are to be paid at closing according to Support Service Agreement

FILE AUDITING/BROKER COMPLIANCE

Fee: \$150

If you find yourself overwhelmed with gathering all the documents and disclosures for your broker's compliance, I can take care of that for you.