

TRANSACTION COORDINATOR SERVICES

TRANSACTION COORDINATOR TASKS

- Receive submission form and signed documents
- Review documents for missing dates/signatures
- Identify deadlines (inspection, financing, HOA review, etc.) and send calendar and email reminders to agent
- Call client to introduce TC as additional resource.
- Send TrustFunds information (buyers only), if requested on submission form
- Confirm EM is paid
- Send list of inspectors (buyers only), if requested on submission form
- Assist in scheduling of inspection as needed.
- Upload documents to Skyslope for broker review and communicate any broker issues to agent
- Upload documents to MYSISU
- Coordinate listing status change (listings only)
- Receive any amendments or additional documents and distribute copies to parties/upload to Skyslope
- Coordinate appraisal scheduling.
- Group text with agent and client if appraisal is "good". If not, TC will contact agent directly
- Follow up with agent/parties to confirm that inspection contingency has cleared
- Follow up with agent/parties/lender to confirm financing contingency has cleared
- Follow up with agent/parties to confirm HOA document review is complete and resale disclosure has been signed
- Confirm closing has been scheduled
- 1 week before closing we will review file again to confirm there are not any missing documents and move forward accordingly
- Request missing documents from client. Includes creating amendments/addenda & sending for signatures
- Prior to closing, confirm any inspection amendment work has been completed and paid receipts provided
- Request 5-star review from client, if agent has provided review links.
- After closing, receive copy of check and settlement statement and submit to Skyslope for processing
- Text request to clients for 5-star reviews
- Prepare amendments/addenda either according to template or agent direction and send out for signature
- Send out signing requests for missing signatures or missing non-customized documents.

AGENT RESPONSIBILITIES WHEN WORKING WITH TCS

- Draft original contract documents and obtain signatures. Negotiate/ problem-solve when issues arise
- Respond to questions and requests from TCs in a timely manner
- Copy TCs on email communication whenever possible to keep everyone informed and reduce duplication efforts
- Handle any time-sensitive matters that arise on evenings or weekends.
- Review proposed ALTA for final check on transaction details.

