PHT Transaction Coordination 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
- Send copy of fully executed purchase agreement to other side agent, closer, and lender (Buyers only)
- 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
- Confirm inspection is scheduled
- Upload documents to Skyslope for broker review and communicate any broker issues to agent
- Upload documents to agent's Google drive for storage/online access
- Coordinate listing status changes (Listings only)
- Receive any amendments or additional documents and distribute copies to parties/upload to Skyslope
- Follow up with agent/parties to confirm that inspection contingency has cleared
- Follow up with agent/parties/lender to confirm financing continency has cleared
- Follow up with agent/parties to confirm HOA document review is complete and resale disclosure has been signed
- Prior to closing, confirm any inspection amendment work has been completed and paid receipts provided
- After closing, receive copy of check and settlement statement and submit to Skyslope for processing

Agent Responsibilities When Working With TCs

- Negotiate/problem-solve when issues arise
- Draft amendments and other documents
- Send documents out for signature
- 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 of efforts
- Handle any time-sensitive matters that arise on evenings or weekends