

Transaction Coordination

Congratulation with your transaction! The following worksheet will help This means your Transaction Coordinator will be working efficiently to see that the necessary documents are

If you are representing a Seller:

Your Escrow Coordinator would need all the appropriate Listing Agreement & Agency Disclosure signed by you & your client before the listing is input into the MLS system. We required paperwork to be turned in within 24 hours of acquiring the listing:

- Listing Contract
- Agency Disclosure
- Authorization to Exclude, if Listing does not enter MLS within 48 Hrs

Your Escrow Coordinator can open a pre-escrow, and order any inspections ordered or reports needed. A Disclosure Package will be prepared for your sellers to fill-out and signed, within 3 days of listing.

If you are representing a Buyer:

Your Coordinator needs to have the following documents fully executed within 24hrs of an accepted offer:

- Purchase Contract
- Agency Disclosures for both Sellers and Buyers
- Buyer's Initial Deposit Check must be turn-in to your Escrow Coordinator
- Counter Offers and Addendum
- Escrow is open if needed
- Disclosure Package and Report will be obtained from Listing Agent

To make sure your Coordinator can continue to provide exceptional service please inform your Coordinator if any reports need to be ordered such as a home inspection or home warranty. Your Coordinator will then contact the title company to order the prelim and schedule a pick-up for the deposit check. Once they receive the disclosures from the Listing Agent they will prepare the disclosure packet for your buyers to sign. These are time sensitive procedures and with your aid your Coordinator will meet all required deadlines.

Congratulations on your new transaction please let us know if you have any questions!

Transaction Detail Sheet

Transaction Information

Address _____
 City, Zip _____
 Area _____ County _____
 List Date _____ Exp Date _____
 Market Date _____ List Price _____
 Contract Date _____ C.O.E. _____
 Sale Price _____ MLS# _____
 Transaction Type Regular Short Sale REO

Commission & Referral Information

Listing Office % _____ Comm Amt \$ _____
 Selling Office % _____ Comm Amt \$ _____
 Referral % _____ Comm Amt \$ _____
 Broker _____
 Tax ID # _____
 Agent's Name _____
 Address _____
 City State Zip _____
 Phone _____ Fax _____

Contingency Removal Dates

Financing _____
 Physical _____
 Other _____

Listing Agent Information

Company Name _____
 Agent's Name _____
 Address _____
 City, Zip _____
 Office Phone _____ Office Fax _____
 Direct Line _____ Cell Phone _____
 E-mail Address _____

Buyer's Agent Information

Company Name _____
 Agent's Name _____
 Address _____
 City, Zip _____
 Office Phone _____ Office Fax _____
 Direct Line _____ Cell Phone _____
 E-mail Address _____

Seller's Information

Name _____
 Address _____
 City, Zip _____
 Home Phone _____
 Work Phone _____ Work _____
 Cell Phone _____ Cell _____
 Fax _____ Fax _____
 E-Mail Address _____
 E-Mail Address _____

Buyer's Information

Name _____
 Address _____
 City, Zip _____
 Home Phone _____ Alt _____
 Work Phone _____ Work _____
 Cell Phone _____ Cell _____
 Fax _____ Fax _____
 E-Mail Address _____
 E-Mail Address _____

Escrow & Deposit Information

Title Company _____
 Escrow Officer _____
 Escrow # _____
 Address _____
 City State Zip _____
 Phone _____ Fax _____
 Init'l Deposit _____ Date _____
 Add'l Deposit _____ Date _____

Lender Information

Company Name _____
 Loan Officer _____
 Address _____
 City, Zip _____
 Office Phone _____ Office Fax _____
 Cell Phone _____ Other _____
 E-mail Address _____
 Loan Program _____ Loan Amount _____

Insurance Info

Quote Yes No Carrier _____ Rate _____

Office Use

File # _____
 Notes: _____

SOURCE MUST BE COMPLETED (CIRCLE ONE)

Cold call/FSBO/Expired Floor Direct Mail/Farming
 Email/eMarketing Newspaper Referral/Center of Infl.
 Internet - Agent Website Open House Sign Call
 Internet - Corp Website Relocation Internet - Other Website

File Checklist

Property:

Agent:

Representing: **Seller** **Buyer** (circle one)

COE:

IN	(S)	(B)	REQUIRED		Description
			L	S	
LISTING FORMS NOTE: Please turn in Listing, along with first five (5) items listed below within 24 hours.					
			R		Exclusive Authorization and Right to Sell
			R		Seller's Agency Disclosure
			R		Short Sale Information & Advisory - SSIA
			R		REO Advisory (Listing) - REOL
			R		MLS Printout / Authorization to exclude from MLS (circle one)
					RE Infolink Data Sheet/Class
					Authorization to Advertise on the Internet
					MLS Status Change Form/MLS Exclusion Form
					Seller's /Tenant's Duty to Protect Personal Property
					Property Profile
CONTRACT FORMS/RELATED FORMS NOTE: Please turn in fully executed Purchase Contract, within 24 hours.					
			R		Purchase Contract: PRDS CAR OTHER (circle one)
			R		Short Sale Addendum - SSA
			R		REO Advisory - REO
			R		Counter Offer: 1 2 3 4 5 (circle one)
					Addendum: 1 2 3 4 5 (circle one)
					"As Is" Addendum (if applicable)
					Common Interest Development Addendum (if applicable)
					Financing Addendum (if applicable)
					Seller Possession after COE (Rent Back)
					CAR Addenda - PAA-11
					Contingent Sale Addenda
					Probate Advisory (CAR)
FORMS NEEDED AT TIME OF SALE					
			R		Buyer's Agency Disclosure signed by Buyer's Agent and "Seller" - Read Box on 1st pg of AD
			R		Seller's Agency Disclosure signed by Seller's Agent - Read Box on 1st Pg of AD
			R		PN Real Estate Group Deposit Check Information Sheet
			R		Copy of Buyer's Deposit Check <input type="checkbox"/> Receipt of Deposit Check - From Escrow <input type="checkbox"/>
			R		Increased Deposit Form (RID-11) If Increased Deposit is part of Purchase Contract
					Copy of Increased Deposit Check
					Buyer's Estimated Closing Costs
DISCLOSURES					
			R	R	Transfer Disclosure Statement - TDS-11
			R	R	Seller Property Questionnaire - SPQ (Applied when CAR Purchase Contract is used, Para 11A is checked)
			R	R	Supplemental Statutory and Contractual Disclosures - SSD (Applied when CAR Purchase Contract is used, Para 11A Checked)
			R	R	Agent's Duty to Visually Inspect and Disclose - AVID
			R	R	Lead-Based Paint & Lead-Based Paint Hazards - FLD (Applied to Residential Prop built before 1978)
			R	R	Water Heater & Smoke Detector Statement of Compliance - WHSD
			R	R	Market Conditions Advisory - MCA
			R	R	Disclosure and Consent for Representation of More than One Buyer or Seller - DA
			R	R	Statewide Buyer and Seller Advisory - SBSA (Applied when CAR Purchase Contract is used, Para 11C)
			R	R	Sellers Affidavit of Nonforeign Status - FIRPTA (Required for all Sellers)
					Mold Disclosure (Included in Buyer Inspection Advisory, Natural Hazard Disclosure)
			R	R	PRDS Seller's Supplemental Checklist - SSC (May be used in place of CAR SSD or SPQ Form)
			R	R	Natural Hazards Disclosure Statement
			R	R	Residential Earthquake Hazards Disclosure Statement (if built pre-1960)
			R	R	Receipt for Environmental Hazards and Earthquake Safety Booklet (Seller's)
			R	R	Receipt for Environmental Hazards and Earthquake Safety Booklet (Buyer's)
					City of San Jose Street Tree Disclosure (REQUIRED if property is located in San Jose)
			R	R	PN Real Estate Group Affiliated Business Disclosure *
			R	R	PN Real Estate Group Inspection Advisory *
NOTE: * Required from SIDE we represent					
CONTINGENCY REMOVALS					
			R	R	Property Condition <input type="checkbox"/> Financing Contingency Removal <input type="checkbox"/>
					Insurance <input type="checkbox"/> Property Disclosures <input type="checkbox"/>
					Title Doc's <input type="checkbox"/> CID Doc's <input type="checkbox"/>
					Lead Inspection <input type="checkbox"/> Seller and Additional Financing <input type="checkbox"/>
INSPECTION REPORTS/CLEARANCES					
			R	R	Preliminary Title Report
			R	R	CC&R's
			R	R	Environmental Report Property ID Disclosure Source JCP Other
			R	R	Geological Report Property ID Disclosure Source JCP Other
					HOA Documents (if applicable) Request for HOA Doc's <input type="checkbox"/>
			R	R	PN R.E.Group Insp Advisory * <input type="checkbox"/> Buyer's Inspection Waiver - BIW <input type="checkbox"/>
					Termite Report <input type="checkbox"/> Termite Clearance <input type="checkbox"/>
					Roof Inspection <input type="checkbox"/> Company Name / #'s:
					Property Inspection <input type="checkbox"/> Company Name / #'s:
					Chimney Inspection <input type="checkbox"/> Company Name / #'s:
					Pool/Spa Inspection <input type="checkbox"/> Company Name / #'s:
					Others <input type="checkbox"/> Company Name / #'s:
					Copy of Permits/Finals <input type="checkbox"/>
FORMS NEEDED AT CLOSE OF ESCROW					
			R	R	Verification of Property Condition - VP (Buyer's Final Walk Through Inspection)
			R	R	HUD Statement
MANAGER'S REVIEW - Listing: _____ Sale: _____ Closing: _____					

Listing Checklist

Date	Cmplt'd	Tasks	Notes
		Listing Contract Signed - Listing Contract, Agency Discl - Authorization to Exclude if not Entering MLS w/i 48 hrs	
		Open Escrow	
		Order NHD, Prelim, HOA Docs	
		Disclosures	
		Inspection	
		Preparation	
		Pictures	
		Yard Sign	
		Flyers	
		Property Folder	
		Open House	

New Purchase Checklist

Date	Cmplt'd	Tasks	Notes
		Purchase Contract Signed - Fully Executed Contract - Counter Offer - Must turn-in to Office w/i 24 hrs	
		Agency Disclosures - Sellers - Buyers	
		Open Escrow if needed (Buyer can open Escrow in Buyer-paid County)	
		Buyer Initial Deposit Check - Copy of check - Copy of Escrow Receipt - Must deposit to escrow in 3 days	
		Disclosures - Obtain Discl's fr Listing Agent - Review Discl and Reports with Buyers	
		Inspection	
		Contingencies Removal	
		Increased Deposit - RID - Copy of Buyer Check - Copy of Escrow Receipt	