



LEVERAGE

REAL ESTATE SUPPORT

Transaction Coordination - What we do...

		TC	Agent
1	Write all contracts and supporting documents		X
2	Deliver documents and contact information to TC		X
3	Review documents for signatures and checkboxes	X	
4	Send introduction email to co-op agent, title company, lender and your client	X	
5	Deliver documents to title company and lender	X	
6	Forward any communications to TC when not copied		X
7	Provide your client with steps to closing explanation to set expectations	X	
8	Intro call to your client and answer any questions	X	
9	Prepare and deliver transaction fee invoice	X	
10	Deliver HOA CCR's to buyer/buyer agent	X	
11	Order the home warranty (if applicable)	X	
12	Send inspection expectations email to your client	X	
13	Any and all negotiations including inspection repairs and changes to the contract		X
14	Deliver utility contact information to buyer/buyer agent	X	
15	Review title commitment and work with your client to satisfy all title requirements	X	
16	Care calls to your clients during lulls in the transaction	X	
17	Inspection repair follow up and report on progress	X	
18	Weekly check in with lending to get updates on progress including loan application, appraisal, final conditions and clear to close	X	
19	Coordinate and schedule closing	X	
20	Send email your client all important details for closing	X	
21	Review settlement statement for errors and deliver to client	X	
22	Review all documents prior to closing to ensure compliance	X	
23	Attend closing and get paid!		X
24	Update your CRM with client address, home anniversary and other details.	X	
25	Submit documents for agency compliance	X	
	HOURS PER TRANSACTION = 12-25	9-20	3-5

The items in bold are services no other transaction coordinators offer.

**Learn more by calling 317-446-3665 or email
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