

Transaction Coordinator Services

TC OBJECTIVE: To handle the daily processing details once the purchase agreement is accepted, ensuring that the timeline stays on track and communications flow smoothly. This results in a transaction process with no surprises and a smooth closing for all parties involved.

INITIAL SET UP:

- Accept Dotloop invite
- Review all documents
- Request missing items
- Confirm inspection date and EMD status
- Arrange documents for title order (listing card, PA, disclosures, EMD)
- Arrange documents for lender (listing card, PA, EMD)
- Order title insurance
- Send or submit to office administrator (if applicable)

INTRODUCTIONS TO:

- Listing/Buying Agent (request or provide any missing items)
- Clients (buyers will be included in lender introduction)
- Lender on buyer side (include title contact, HOA contact if applicable)

IF NEEDED:

- Get survey quotes, order survey and distribute when received
- Get HOA contact info. and request association documents and fees, send to client/title/lender
- Order well and septic inspections and distribute reports when received
- Order home warranty and provide invoice to client/title/lender

FOLLOW UP/TRACK:

- Check inspection status and keep agent apprised of the end date
- Notify lender to order the appraisal and let the listing agent know
- Notify Buyers Agent when appraisal has been scheduled
- Check with Lender or Buyers Agent one week after appraisal appointment for status and notify all parties
- Assist with follow up on any addenda and distribute to necessary parties
- Review title commitment and send to client and agent. Notify and track if anything is needed to clear title
- Check in with parties on target status during final phase

CLOSING:

- Coordinate with all parties and schedule closing
- Send closing confirmation details to client, including time, location, possession date and utility contacts
- Review closing statement and send to client and agent
- Add closing package to the loop and change the loop status



Trish Boros
Transaction Coordinator
616.730.3348
trish@grtransactions.com

