The British Virtual Assistant


SHARON SENGER
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# TRANSACTION MANAGEMENT

*"Taking you smoothly from contract to closing"*

## Summary of Services

### Setup:
Receive signed P & S Contract
Check all addendums are attached and all documents have been signed/initialed
Check all contingency due dates and set up reminders to ensure no important deadlines are missed.
Communicate with Agent to confirm all paperwork has been received and is correct
Prepare commission disbursement forms and send to appropriate parties
Send Agent copy of timelines and critical dates

### Processing:
Confirm that title has been ordered and if not then order.
Update title with Buyers information and arrange for copies to be sent to all parties
Confirm that title has been received by all parties
Confirm that CC&R's and HOA Minutes have been received
Send to Escrow commission disbursement and copy of P&S contract
Send all other parties involved with the transaction a copy of the P&S contract
Send Agent Transaction Summary Report
Contact Buyers' Lender that loan application has been made and request a copy of the Buyers pre-qualification letter. Add to digital file.
Check Earnest-Money note due date, track and add to digital file
Confirm listing status changed in NWMLS

### Vendor Appointments:
Set up and confirm Home Inspector appointment
Set up and confirm Pest Inspector (if appropriate)
Set up and confirm any additional service provider appointments
Monitor and obtain receipts for all work orders
Order Resale Certificate
Order and distribute Home Owners Associate CC&R's
Order and distribute Home Owners Minutes
Appraiser check when to be carried out

**Deadline Tracking:**
Sends reminders to Agent via phone and/or email daily to confirm contingency due dates.
Typical but not limited to contingencies that are tracked:
Inspection Contingency
Financing Contingency
Septic Addendum (where appropriate)
Form 17
Sale of Contingent property
Resale Certificate
CC&R's and HOA Minutes review
Appraisal call to Lender

**Lender Communication:**
Periodical checks with the Lender to ensure that the transaction is going to schedule
Check date of appraisal
Track work orders and obtain receipts
Monitor estimated delivery of loan docs to Escrow

**Escrow Communication:**
Liaise with Escrow to confirm Loan docs are received prior to closing
Liaise with Escrow to confirm signing appointments have been set up
Ensure that Escrow have copies of all receipts for work orders
Ensure that Escrow have received any additional or changes to addendums that may have taken place during the course of the transaction
Contact Escrow on the day of closing to ensure that recording and funding has occurred with no problems.
Contact Agent confirm that the transaction has closed

**Additional Services:**
Check and confirm with Agent Buyers walk through prior to closing
Custom branded CD for Agent & Office with all key documents, notes & emails
Check status in MLS to sold
Order sign to be removed
Digital storage of File for 30 days after closing

**Transaction Coordination Fee:** **$499.00 per transaction**