



## **Policies, Procedures, and Pricing**

**[brokerrelieftm.com](http://brokerrelieftm.com)**

**970-599-1172**

# Hello!

My name is Nikole Stevenson, and I am a **Licensed Transaction Coordinator** in Colorado. I am excited to be working with you. I know you have a choice about which TC you add to your team and I am **sincerely thankful** for you choosing my Transaction Management business, **Broker Relief!**

The main benefits of working with a virtual TC are business **growth, productivity, freedom** of time, and processes that create structure.

Utilizing my services will **save you time and money** so you can focus on the things that matter in your business.

I will work on the tasks we've agreed upon upfront. It's the only way I can be **highly efficient** and keep my prices in check. If you require additional tasks done, additional fees may be included and agreed upon by both parties. The primary systems I use in my business are CTM Econtracts, GSuite, Outlook, and TCDocs.

**“Nikole with Broker Relief is our transaction coordinator for Penta Homes Real Estate and Property Management.**

**She is professional, on top of things, and has great integrity. We don't ever have to follow up with her to make sure she is getting the job done. She frees up our time to do other things and we love having a TC. Highly recommend!” -Penta Homes**



# Policies & Procedures

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## **01. Communication**

My preferred method of communication is email. I am open to other forms as needed. All emails received during business hours will be responded to the same day.\*

*\*New files received after 3pm will be processed the next business day.\**

## **02. Hours of Operation**

Monday through Friday 9-5 MST.

Weekends may be available on a case by case basis, with a fee to be determined ahead of time.

## **03. Transaction Fees**

Buyer OR Seller Side: \$500

Dual Sides: \$800

Cancelled File: \$50

## **04. Billing and Payment**

The agent agrees to pay invoices directly within 15 working days of closing (unless otherwise agreed upon).

Invoices will be sent via email.

## **05. Contracting Team**

On occasion I may utilize the services of a subcontractor (such as when I am unavailable and need to keep things moving in my absence). Under these circumstances their work will be overseen by me personally to ensure quality and compliance.

## **06. Confidentiality**

Your confidentiality and privacy is the utmost importance to me. No information will be divulged to third parties about your business.

# Transaction Coordinator Tasks

*This is a list of common tasks that I will complete for you. Please review thoroughly and sign at the bottom to confirm your approval.*

## **WHEN THE TRANSACTION IS UNDER CONTRACT I WILL:**

- Keep everyone informed
  - Introduction emails will be sent providing contract deadlines, transaction contacts, and a copy of executed contract to Lender, Co-Op Agent, Title Company, and Buyer/Seller (your client as appropriate).
  - Introduction emails to agent's client (buyer/seller) will include agent's suggestions on home insurance, inspectors, etc. This is customized per agent and will need to be reviewed/approved for the first transaction.
  - Maintain constant contact with all parties involved for status updates as well as outstanding items.
  - Provide agent weekly email updates on the status of the transaction (on Mondays unless otherwise specified).
  - Coordinate with agent's compliance department throughout transaction.
- Create file within your preferred compliance software (such as CTM or brokerage-designated program).
- Ensure initial documents are fully executed
  - Check for proper dates, initials, and signatures.
  - Ensure broker information on contract is completed.
  - Reach out for corrections as necessary.
  - Assist in compliance with the contract as requested by compliance/escrow department.
  - Submit all required under-contract documents to compliance within 48 hours of execution.
- Contact Title Company for a copy of the Earnest Money receipt, and include in compliance file.

- Gather additional documents throughout the contract.
  - Send/request disclosure packages and gather signatures.
  - Upload all disclosures, documents, and reports into agent's file as they are received or fully executed throughout the transaction.
- Order Home Warranty and/or Survey/ILC upon request.
- Monitor contract changes
  - Ensure the Lender, Title Company, and compliance department receive any amendments or changes to the contract.
  - Update deadlines from amend-extends.
- Monitor deadlines
  - Monitor status of buyer's loan with Lender.
  - Monitor appraisal timeline and completion with Lender.
    - Keep agent and their client (buyer/seller) informed about appraisal.
  - Ensure HOA documents are sent/received in accordance with deadlines.
  - Monitor all other deadlines within transaction by providing email reminders to agent, Lender, and/or Title Company.
  - Send an email reminder to agent on the day of any applicable deadlines pertaining to their side of the transaction in addition to the weekly status updates.
- Closing Items
  - Check with Title Company and agent's compliance department to ensure the file is ready prior to closing.
  - Assist in scheduling closing appointment with Title Company, agent, agent's client (buyer/seller), and co-op agent in a timely manner.
  - Email agent and their client (buyer/seller) with closing details including date, time, and location.
  - Confirm closing occurred.
- Provide completed file within 7 days after closing
  - Email agent AND their client (buyer/seller) with final copies of the documents from closing.
  - Upload a file with copies of all of my emails pertaining to the transaction.
  - Email agent a zip file of all transaction documents.
  - Email compliance department with the zip file, if applicable.
  - Ensure the agent's file in their preferred compliance software is completed.

## Agent Expectations During Transaction:

- Fight for the clients
  - Advise and negotiate with clients and other agents.
  - Review Title Instructions and settlement statements.
  - Review Preliminary Title Reports.
  - Negotiate repairs and/or any changes in contract.
- Draft the win!
  - Prepare all contracts (as per DORA, a TC is not allowed to perform any licensed activities without being listed as a co-agent on the contract).
- Keep in touch
  - Communicate items needed/contract changes with TC in a timely manner.
  - Forward necessary documents to TC as they are obtained.
- Review/Approve Commission Disbursement from Title Company.

## ALA CARTE SERVICES

These are some additional services that I provide in addition to the core Transaction Management services. If there is something you need that isn't listed just ask.

- |   |   |
|---|---|
| <input type="checkbox"/> <b>Flyer/Brochure Design</b> | <input type="checkbox"/> <b>Social Media Management</b>             |
| <input type="checkbox"/> <b>Data Entry</b>            | <input type="checkbox"/> <b>Showings (\$50 + hourly drive time)</b> |
| <input type="checkbox"/> <b>Client Concierge</b>      | <input type="checkbox"/> <b>Other-Ask!</b>                          |

**Fee Schedule:**

- All of the below paid upon invoice:
  - Listing or Buying Side: \$500.00
  - Dual Transaction: \$800.00
  - Special Project Work: \$50.00 per hour
  - Cancelled File: \$50.00
- Services are to be billed within 15 days of closing or of service completion unless otherwise agreed upon. As per the Colorado Division of Real Estate, services must not be dependent upon closings, and thus cancelled files and additional services are billed as listed.

I agree that I have reviewed the transaction coordinator tasks and agree to receive these services.

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Signed

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Date

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Name

**"I look forward to helping you excel further in your real estate business while giving you more time to focus on**



**what is most important; your clients!"**

# To begin working on your files, we'll need the following items:

## During onboarding:

- ✓ List of all documents needed for compliance for your brokerage
- ✓ Access to brokerage compliance software or CTM
- ✓ Review/Customize introduction emails
- ✓ List of preferred vendors, such as inspector, insurance agent, and Title Company, and preferred appraisal scheduling method such as Showing Time

## For each file:

- ✓ Executed Contract and disclosures (share via CTM if applicable)
- ✓ Client name, phone, & email (Can be shared via CTM if applicable)
- ✓ Lender name, phone, & email
- ✓ Title and/or Escrow contact name, email, and phone
- ✓ Billing contact, phone & email