



RESPONSIBILITIES

TRANSACTION COORDINATOR TASKS

LISTING COORDINATION

- Draft listing documents*
- Schedule photos
- Add listing dates to calendar
- Send introduction email to clients
- Enter listing as draft in MLS*
- Send listing live email to clients
- Order listing home warranty
- Draft price change documents
- Update MLS status or content
- Submit and ensure file compliance*
- Process listing cancellation or expiration

TRANSACTION COORDINATION

- Update MLS status
- Add contract dates to calendar
- Draft commission statement
- Send introduction emails
- Order home warranty
- Order utilities concierge service
- Track earnest money
- Track appraisal
- Track loan status
- Draft amendments
- Send executed documents to parties
- Email closing reminders
- Confirm release of contingencies
- Schedule closing
- Email closing packet to closers
- Email closing instructions
- Request final statement for review
- Maintain file organization
- Submit and ensure file compliance
- Send post-close check-in to clients
- Send review request to clients
- Schedule closing statement email
- Verify sold information in MLS
- Email tax credit reminder to clients
- Enter listing comp as draft in MLS*
- Process contract termination*

All tasks are subject to permitted access to applicable accounts, platforms, and systems.

*Separate or additional fees may apply



AGENT RESPONSIBILITIES

GENERAL

- Maintain contact databases
- Schedule showings
- Draft buyer agreements
- Draft purchase agreements
- Maintain file records
- Communicate brokerage, association, and legal requirements

LISTING COORDINATION

- Submit service form
- Prepare listing description
- Review and approve draft listing documents
- Provide property access details
- Collect property documentation (HOA, solar, etc.)
- Review and approve draft MLS listing
- Share showing feedback with clients

TRANSACTION COORDINATION

- Submit service form
- Locate and deliver abstract
- Collect property documentation (HOA, solar, etc.)
- Schedule inspections
- Coordinate inspection repairs
- Collect or provide inspection repair documentation
- Initiate contract changes
- Review and approve draft documents
- Notify TC of transaction updates
- Approve release of contingencies
- Schedule final walkthrough
- Review commission statements
- Review final statement
- Upload closing documents
- Deposit commission checks
- Handle post-closing requests

These lists are intended as a general guide and may change as needed. Some tasks may not be relevant or required for every file.