

EXAMPLE

Document Checklist with NOTES

0_3_Trust/LLC

1_Escrow

CDA

BR B BA S LA **FULLY EXECUTE!**

2/3/20 9:49 AM | did 2-3 sent to cassie 2-4

Commission

BR B BA S LA

1/31/20 1:39 PM | asked 1-31,

EMD

BR B BA S LA

1/31/20 1:39 PM | asked 1-31,

Escrow Amend Buyers name

BR B BA S LA

Escrow Inst

BR B BA S LA

1/31/20 1:39 PM | asked 1-31,

TC Invoice

BR B BA S LA

2/3/20 9:53 AM | made

Title plot map

BR B BA S LA

Title Report

BR B BA S LA

1/31/20 1:39 PM | asked 1-31,

2_Sales Docs

AD2

BR B BA S LA **FULLY EXECUTE!**

2/5/20 12:48 PM | asked 2-5

ADM1 credit

BR B BA S LA **FULLY EXECUTE!**

1/30/20 3:43 PM | sent 1-30

ADM2- buyers name

BR B BA S LA

1/31/20 1:35 PM | sent 1-31,

BIA

BR B BA S LA **FULLY EXECUTE!**

2/5/20 12:48 PM | asked 2-5

POF

BR B BA S LA **FULLY EXECUTE!**

PRBS

BR B BA S LA

1/28/20 7:49 PM | 1-28,

RPA

BR B BA S LA

1/28/20 7:49 PM | need #32 box checked and dated LA sig, asked 1-28,

RPA pg10 Escrow

BR B BA S LA

1/31/20 1:39 PM | asked 1-31,

TAXROLL

BR B BA S LA

WFA

BR B BA S LA

EXAMPLE

Document Checklist with NOTES

3_Disclosures

- AVID KW**
 BR B BA S LA **FULLY EXECUTE!**
2/6/20 8:10 PM | asked 2-6
- AVID Other**
 BR B BA S LA **FULLY EXECUTE!**
- Consumer ACK**
 BR B BA S LA **FULLY EXECUTE!**
- DBD**
 BR B BA S LA **FULLY EXECUTE!**
- Environmental Ack**
 BR B BA S LA **FULLY EXECUTE!**
2/5/20 12:45 PM | asked 2-5,
- ESD**
 BR B BA S LA **FULLY EXECUTE!**
2/5/20 12:46 PM | 2-5
- FVAC**
 BR B BA S LA
- KW ABD**
 BR B BA S LA **FULLY EXECUTE!**
- LAD**
 BR B BA S LA **FULLY EXECUTE!**
- MCA**
 BR B BA S LA **FULLY EXECUTE!**
- NHD Report - Add 2 RFR**
 BR B BA S LA **FULLY EXECUTE!**
2/5/20 12:46 PM | asked 2-5, HAVE
- NHD Sig**
 BR B BA S LA **FULLY EXECUTE!**
- QS**
 BR B BA S LA **FULLY EXECUTE!**
2/5/20 12:58 PM | MADE

Closing Docs for Broker

- 0_CC**
 BR B BA S LA **FULLY EXEC**
- 1_Asked Compliance Officer**
 BR B BA S LA **FULLY EXEC**
1/28/20 8:18 PM | scheduled email to go out on 2-21
- 3_Transaction Summary**
 BR B BA S LA **FULLY EXEC**
- 4_MLS Sold**
 BR B BA S LA **FULLY EXEC**
- 5_Final Statement**
 BR B BA S LA **FULLY EXEC**
- 6_TCDoc Notes**
 BR B BA S LA **FULLY EXEC**
- 7_Email Log**
 BR B BA S LA **FULLY EXEC**
- 8_Sent client file by email**
 BR B BA S LA **FULLY EXEC**
- 9_Got Paid**
 BR B BA S LA **FULLY EXEC**