

# Service Lists

## **Buy Side-\$600**

- Letter of introduction to clients and vendors/Send congratulations to clients w/ important next steps
- Create a customized closing checklist for brokers and clients shared through A Frame Portal
- Review all documents for compliance correctness-interface with broker when documents/signatures are needed
- Create transaction folder and import/organize documents-shared with all parties through A Frame Portal
- Share dates and deadlines to Calendar integrations
- Send contract documents to title company, lender, co-broker
- Track deadlines (document reviews, inspections, ORW, etc.)
- Confirm receipt of earnest money
- Create any additional documents needed throughout transaction, obtain necessary signatures, and
- Send documents to vendors when necessary (extensions, amendments, addendums)
- Order/Schedule/Follow-up with vendors including:
  - Title company
  - Inspectors/Testers (Well, pests, water, etc.)
  - Appraiser
  - Surveyor
- Provide any documents needed by vendors (surveys, HOA Disclosure, CCR's, etc.)
- Provide additional Weekly updates/follow-up for clients via email or through A Frame Portal
- Provide clients utility information for opening or closing accounts
- Set up closing for clients
- Send final closing disclosures and request client reviews
- Submit compliance documents & commission for approval