Services & Pricing Guide

🟢 BASIC — Compliance Support Package | $250

Ideal for agents who want peace of mind knowing their files are compliant and properly uploaded, while they handle client communication and negotiations.

📁 File Setup & Compliance

- Create transaction and upload initial documents to brokerage CRM
- Monitor file for missing or required documents
- Ensure all required documents are uploaded for brokerage compliance
- Track addendums, RE-10, and required forms as the transaction progresses

📌 Ongoing Oversight

- Remind agent of missing items and compliance deadlines
- Keep file organized and up to date in CRM

👉 **Agent remains main point of contact for client, title, and lender.**

✅ **We currently work with and are experienced in the following brokerage platforms:**

 SkySlope • Paperless Pipeline • BrokerMint • Silvercreek Docs • Reesio

(and are happy to learn and adapt to additional systems as needed)

🔵 STANDARD — Full Transaction Coordination | $500

Best for agents who want full support from contract to close and less day-to-day admin work.

📁 File Setup & Compliance

- All services included in Basic Package
- Full document management from pending to close
- Ensure brokerage compliance and file completion

🤝 Communication & Coordination

- Open transaction with title, lender, client, and other agent
- Act as liaison between all parties throughout transaction
- Send client updates and copies of paperwork as needed

📅 Scheduling & Deadlines

- Coordinate and schedule home inspection
- Track deadlines and contingency timelines
- Schedule signing appointments and coordinate key handoff

📄 Transaction Documents

- Assist with writing addendums, RE-10, and transaction-related forms
- Prepare disbursement agreement (DA) and share with brokerage and title

👉 **Agent stays focused on client relationships and negotiations.**

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(and are happy to learn and adapt to additional systems as needed)

🟣 PREMIUM — White-Glove Transaction Support | $750

Best for agents who want hands-on support and elevated client service throughout the transaction.

✅ **Everything in Standard, plus:**

✍️ **Offer & Contract Support**

- Assist with writing initial offer documents (BB, RE14, RE21)
- Prepare additional brokerage-required documents as needed
- Obtain signatures on all buyer documents

🤝 **Client-Focused Service**

- More direct support with paperwork and timelines
- Extra assistance ensuring smooth communication and quick turnaround

👉 **Great for busy agents or those handling higher transaction volume.**

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SkySlope • Paperless Pipeline • BrokerMint • Silvercreek Docs • Reesio

(and are happy to learn and adapt to additional systems as needed)

🟡 DELUXE — Full-Service + Offer Strategy Support | $1,000

Best for agents who want maximum leverage and full administrative support from offer to close.

✅ **Everything in Premium, plus:**

📝 **Offer Strategy & Submission**

- Write additional RE-21 offers until contract is accepted
- Prepare and send offer with highlights to listing agent
- (or provide scripted email for agent to send)

🚀 **Maximum Support**

- Priority-level coordination and fast turnaround
- Full back-end support so agent can stay fully client-facing

👉 **Ideal for competitive markets and high-volume agents.**

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(and are happy to learn and adapt to additional systems as needed)

Buyer Transaction Coordination Packages

Basic - Perfect for agents who simply need help uploading files to their brokerage CRM and staying compliant.

Standard - Ideal for agents who want us to manage the transaction details and communicate directly with all parties.

Premium - Perfect for agents who would like extra help in order to give their clients exemplary service from start to finish.

Deluxe - Perfect for agents who want a high-touch, polished experience for their clients from contract to close

Buyer Transaction Coordination Packages

TRANSACTION SERVICES	BASIC $250	STANDARD $500	PREMIUM $750	DELUXE $1000
Full document transaction coordination from pending to close	✔	✔	✔	✔
Transaction creation and Initial documents uploaded to brokerage CRM	✔	✔	✔	✔
Monitor compliance and remind agents of missing documents	✔	✔	✔	✔
Keep track of Addendums, RE-10 & all docs as the transaction progresses	✔	✔	✔	✔
Ensure 100% of docs are uploaded to brokerage CRM for completion	✔	✔	✔	✔
Open transaction with title, lender, client & listing agent and act as a liaison		✔	✔	✔
Send client updates & a copy of all paperwork throughout transaction		✔	✔	✔
Coordinate and schedule home inspection with buyer and listing agent		✔	✔	✔
Help write Addendums, RE-10 & other docs as the transaction progresses		✔	✔	✔
Schedule signing appointment and coordinate key handoff for closing		✔	✔	✔
Create disbursement agreement (DA) and share with brokerage and title		✔	✔	✔
Help write all intial offer docs including BB, RE14, RE21			✔	✔
Help write any other applicable docs for brokerage compliance			✔	✔
Get signatures on all buyer docs			✔	✔
Help write additional RE-21 offer contracts until the offer gets accepted				✔
Send offer with all highlights to listing agent or a scripted email for buyer's agent to send if preferred				✔

🟢 BASIC — Listing Compliance Package | $250

Best for agents who manage the listing and client communication but want help staying compliant.

📁 File Setup & Compliance

- Create listing transaction and upload initial documents to brokerage CRM
- Monitor file for missing or required documents
- Track addendums, RE-10, and required forms as the transaction progresses
- Ensure all required documents are uploaded for brokerage compliance

📌 Ongoing Oversight

- Remind agent of missing documents and compliance deadlines
- Keep file organized and updated through closing

👉 **Agent manages client communication, showings, and vendors.**

✅ **We currently work with and are experienced in the following brokerage platforms:**

SkySlope • Paperless Pipeline • BrokerMint • Silvercreek Docs • Reesio

(and are happy to learn and adapt to additional systems as needed)

🔵 STANDARD — Full Listing Transaction Coordination | $500

Best for agents who want support managing the transaction once under contract.

📁 File Setup & Compliance

- All services included in Basic Package
- Full document management from pending to close
- Ensure brokerage compliance and file completion

🤝 Communication & Coordination

- Open transaction with title, lender, client, and buyer's agent
- Act as liaison between all parties throughout transaction
- Send client updates and copies of paperwork as needed

📅 Scheduling & Deadlines

- Coordinate home inspection with buyer's agent and seller
- Track contingency deadlines and key milestones
- Schedule signing appointment and coordinate closing logistics

📄 Transaction Documents

- Assist with writing addendums, RE-10, and transaction-related forms
- Prepare disbursement agreement (DA) and share with brokerage and title

👉 **Agent remains focused on negotiations and client relationships.**

✅ **We currently work with and are experienced in the following brokerage platforms:**

SkySlope • Paperless Pipeline • BrokerMint • Silvercreek Docs • Reesio

(and are happy to learn and adapt to additional systems as needed)

🟣 PREMIUM — Listing Launch + Transaction Support | $750

Best for agents who want help preparing and managing the listing in addition to transaction coordination.

✅ **Everything in Standard, plus:**

📝 **Listing Preparation**

- Prepare listing paperwork (BB, RE16, IMLS forms, and other required documents)
- Enter and maintain listing in IMLS, including remarks and updates

📸 **Vendor & Marketing Coordination**

- Schedule photography, staging, sign installation, and vendor appointments
- Coordinate pre-listing logistics with seller and vendors

👉 **Great for busy agents or teams listing multiple properties.**

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(and are happy to learn and adapt to additional systems as needed)

🟡 DELUXE — Full-Service Listing & Marketing Support | $1,000

Best for agents who want maximum leverage from pre-listing through closing.

✅ **Everything in Premium, plus:**

📣 **Marketing Support**

- Create a custom property flyer and amenities sheet for agent use
- Schedule open houses and coordinate logistics

🚀 **Priority-Level Support**

- High-touch communication and fast turnaround
- Full backend support so the agent stays fully client-facing

👉 **Ideal for agents who want a true assistant-style experience.**

✅ **We currently work with and are experienced in the following brokerage platforms:**

SkySlope • Paperless Pipeline • BrokerMint • Silvercreek Docs • Reesio

(and are happy to learn and adapt to additional systems as needed)

LISTING Transaction Coordination Packages

BASIC - Perfect for agents who simply need assistance uploading their transactional paperwork to their brokerage's CRM and staying compliant.

STANDARD - Perfect for agents who would like the standard amount of transactional assistance, allowing us to work directly with the client and free up the agent's time.

PREMIUM - Perfect for agents who would like extra help in order to give their clients exemplary service from start to finish.

DELUXE - Perfect for agents who want a high-touch, polished experience for their clients from contract to close

Listing Transaction Coordination Packages

TRANSACTION SERVICES	BASIC $250	STANDARD $500	PREMIUM $750	DELUXE $1000
Full document transaction coordination from pending to close	✔	✔	✔	✔
Transaction creation and Initial documents uploaded to brokerage CRM	✔	✔	✔	✔
Monitor compliance and remind agents of missing documents	✔	✔	✔	✔
Keep track of Addendums, RE-10 & all docs as the transaction progresses	✔	✔	✔	✔
Ensure 100% of docs are uploaded to brokerage CRM for completion	✔	✔	✔	✔
Open transaction with title, lender, client & buyer agent and act as a liaison		✔	✔	✔
Send client updates & a copy of all paperwork throughout transaction		✔	✔	✔
Coordinate home inspection with buyer's agent and client & send CBS code		✔	✔	✔
Help write Addendums, RE-10 & other docs as the transaction progresses		✔	✔	✔
Schedule signing appointment and coordinate key handoff for closing		✔	✔	✔
Create disbursement agreement (DA) and share with brokerage and title		✔	✔	✔
Prepare listing paperwork including BB, RE16, IMLS & any other listing forms			✔	✔
IMLS Data Entry, Maintenance & Remarks creation			✔	✔
Schedule signpost, photography, staging & any other vendor appointments				✔
Create custom flyer and amenities sheet for agent to print for listing				✔
Schedule Open Houses				✔

Additional Transaction Services

$50
SHOWINGS

- Provide property access for client showings
- Price per showing
- (Location may affect pricing

$150
Listing Material Set Up & Removal

- Flyers, bin, booties, signage & lockbox set up and removal per listing
- Includes up to 25 flyers, bootie bin & booties
- Will store agent signage for this service
- (Location may affect pricing)

$50
Listing Rider Change

- Place pending or rider-of-choice sign at listing
- Will store agent riders for this service
- (Location may affect pricing)

$50
Listing Vendor Access

- Provide vendors access to the property for scheduled services
- Price per vendor visit
- (Location may affect pricing)

Marketing Services

$250+
Pop-By Creation

- Custom pop-bys for client appreciation, holidays, birthdays, and sphere touches
- Choose from a curated list of themed options upon request
- Includes planning, sourcing, and assembly
- Pricing does not include materials or delivery

$125+
Newsletter Creation

- Custom content and branded design for each newsletter
- Frequency based on agent preference
- Uploaded and sent through the agent's preferred email platform

$400+
Social Media Marketing

- Includes 3 branded posts per week
- Packages can be customized for agents who need additional content or increased posting frequency
- Stories and video content are available as add-ons for an additional cost
- Monthly pricing

Business Services

$500+
Email Scripts Set Up

- Custom email scripts designed to streamline communication throughout the transaction process
- Includes 10 custom scripts tailored to either a buyer or seller workflow, covering key stages from contract to close

$500+
CRM Set Up

- Full CRM setup for your sphere using your software of choice
- Final pricing based on database size and CRM platform

$500+
Project Management

- Setup of detailed buyer and seller transaction workflows and checklists
- Built within your preferred project management software (Asana, Jira, Hive, Trello, etc.)

$500+
SOP Creation

- A Standard Operating Procedure designed for your team
- Ensures all team members understand exactly how the business operates, saving time and improving training

$500+
Card CRM Set Up

- Card-based CRM setup to stay in touch with your sphere and past clients
- Automated cards sent for birthdays, anniversaries, holidays, or custom dates
- Final pricing based on database size and card frequency