



## Expectations & Responsibilities

OPENING ESCROW		AGENT	TC
	Provide fully executed & complete Contract	X	
	Provide client's contact information	X	
	Double-checking Contract for completeness		X
	Sending Contract to Escrow to Open Escrow		X
	Completing Escrow Instructions		X
	Completing Timeline		X
	Sending Timeline to all parties		X
	Creating Skyslope, Dotloop, or Brokerage's Programs to upload Docs		X
If Representing Buyer:			
	Provide Lender's Information	X	
	Provide preferred inspection companies	X	
	Send Contract to Lender		X
If Representing Seller:			
	Provide fully executed Listing Agreement	X	
	Provide entry instructions	X	
	Remind or Change MLS Status		X
PROCESS		AGENT	TC
	Read emails and respond diligently	X	X
	Keep TC updated of any new information affecting transaction	X	
	Inform Clients of TM role	X	
	Main communication with Clients	X	
	Attend inspections	X	
	Review all inspection data & reports	X	
	Provide verbiage for any additional addenda	X	
	Draft Additional Addenda if necessary		X
	Approve Addenda	X	
	Send documents needed for signatures (via DocuSign)		X
	Forward Clients and all parties any document copies for filing		X
	Send notifications through email of deadlines		X

INSPECTIONS & CONTINGENCIES		AGENT	TC
If Representing Buyer			
	Coordinate Home Inspection Negotiate findings		X
	of Home Inspections Draft J-1 Election & send	X	
	for signatures Schedule J-1 Repairs Provide		X
	Coop with Termite Inspection Company Send	X	
	Verification of Funds to Seller Send Prequal to		X
	Seller Track loan status with Lender Negotiate		X
	Appraisal findings Obtain Conditional & Final		X
	Loan Approval		X
		X	
			X
If Representing Seller			
	Send a blank SRPDS to Seller to Complete if Needed		X
	Send SRPDS to Coop Agent		X
	Provide payment method for Condo/M-1 Docs	X	
	Order Condo/M-1 Docs		X
	Send Condo/M-1 Docs to Coop Agent		X
	Schedule Termite Inspection		X
	Schedule Survey		X
PRE-CLOSING		AGENT	TC
	Review Estimated Settlement	X	
	Schedule Final Walk Through		X
	Schedule Signing		X
	Send Utility Checklist to Client		X
If Representing Seller			
	Instruct when to schedule Pre-closing tasks	X	
	Schedule de-staging (if applicable)	X	
	Schedule Cleaning (if applicable)		X
DAY OF RECORDATION		AGENT	TC
	Submit Skyslope, Dotloop, or Brokerage's Program for compliance		X
	Change MLS Status to Sold (if applicable)		X