A. **Basic Seller Closing Package**

Agent completes all paperwork with seller(s) prior.
- ➤ Communications and scheduling with all parties
- ➤ Schedule closing, complete attorney forms, review CD/HUD
- ➤ Process Home Warranty (if applicable)
- ➤ Compliance review and document management (Dotloop, others, and personal file)
- ➤ Coordinate commission check and file submission to office

Not Included: Negotiating price or repairs

B. **Basic Buyer Package**   (FSBO transactions)

Agent completes all paperwork with buyer(s).
- ➤ Communications and scheduling with all parties
- ➤ Order inspections
- ➤ Schedule closing, complete attorney forms, review CD/HUD
- ➤ Process Home Warranty (if applicable)
- ➤ Compliance review and document management (Dotloop, others, and personal file)
- ➤ Coordinate commission check and file submission to office

C. **Basic New Construction Closing Package**

Agent completes all paperwork with buyer(s).
- ➤ Communications and scheduling with all parties
- ➤ Order inspections (if necessary)
- ➤ Review CD/HUD, if available
- ➤ Compliance review and document management (Dotloop, others, and personal file)
- ➤ Coordinate commission check and file submission to office

Not Included: Negotiating price or repairs

Terminated transaction fee if a lot has been completed $50

POLICIES

<u>New Clients:</u> One-time startup fee of $40 for initial set up.

<u>Service Request form:</u> Agent will complete form with package or service requested and detail customer contact information (this can be sent via email)

<u>Office space and meetings:</u> The "By George" Services employee has a home office and will perform any field work as needed or agreed upon. The "By George" Services employee is not required to be present at any other office, unless otherwise agreed to. The agent and the "By George" Services employee may schedule convenient meeting times/locations as needed to discuss assignments.

<u>Invoicing:</u> Closing transactions are invoiced the day after closing.

<u>Payments:</u> Invoices are sent through email. Payment can be made with credit card, debit card, cash, or check payable to By George Services, LLC address listed below. Payments are due upon receipt. Payments are considered late after 10 days and a 10% late fee will be added.

By George Services, LLC 1215 Crown Vista Drive Indian Land, SC 29707

<u>Taxes:</u> "By George" Services is incorporated and will provide a W-9.

<u>Relationship:</u> The agent is responsible for paying "By George" Services for all work performed and goods procured. This relationship is not binding and as such, can be terminated by either party at any time. Assignments initiated prior to termination will be completed and compensated for as intended, unless otherwise agreed to.

<u>Services:</u> "By George" Services does not carry pass through expenses to third parties, unless otherwise agreed to. As the "By George" Services employee may be a party to confidential client information, such information shall remain confidential to the agent and "By George" Services employee

The policies listed above are hereby agreed to by the following:

Agent: _____

Date: _____

NEW CLIENT SET-UP

Agent:_____

Phone:_____

Email(s) – include all that apply: _____

_____

Company Name, Address, and Compliance phone number and Broker-in-charge:

_____

_____

_____

License#: NC_____NRDS#:_____

SC_____

Service	User Name/log in:	Password:
MLS		
Command		
Dotloop		
DocuSign		
Dropbox		
Zip forms		
Other system		

*Please provide authorization for all accounts that sharing is required, i.e. MLS

identity sharing, Dropbox, OneDrive, etc.

"BY GEORGE" SERVICES
Assisting Real Estate Agents

Service Request/Customer Information

Agent:_____ Date:_____

Package:_____

Customer Information:

Names:_____

Customer 1 Email:_____

Customer 1 Cell:_____

Customer 2 Email:_____

Customer 2 Cell:_____

Seller:

Specific Instructions:

_____

_____

_____

Buyer:

Inspections out of normal: _____

Specific Instructions:

_____

_____

_____

Lender Info: _____

Attorney to pick: _____

Additional request: _____

Additional Services: _____

_____

_____

Lynn Marshall
704.562.8263 Office/Cell
Lynn@ByGeorgeServices.com